



# Design-Build Go/No-Go Process and Checklist

The Go/No-Go process is a key component of risk management. Analyzing and understanding the qualifications and capabilities of the client, project, and team are critical to making informed decisions in the pursuit and implementation of all design projects. For design-build delivery, the process is especially valuable in assessing whether the up-front marketing investment and enhanced risk inherent in this project delivery process is supportive of strategic goals, revenue objectives, and operational realities.

Implementing a formal Go/No-Go Process will:

- Increase your odds of success
- Reduce your exposure to liability
- More efficiently use your company's manpower and resources
- Enable you to make decisions more objectively than subjectively

The key items to consider in making a go/no-go decision on whether to pursue a design-build project include both external and internal client and project criteria, your own and your project team's capabilities, and various strategic factors impacting the marketing and winning of the new work. These items include:

## 1. External Owner and Design-Builder Considerations

*These are more objective and will be the same for any firm.*

Consider their experience with design-build and the proposed project type, their reputation, their financial capability, and their litigation history are all things that would be the same for any firm considering the work.

## 2. Internal Owner and Design-Builder Considerations

*These items are more about how the owner and design-builder relate to your firm.*

Identify whether the owner and/or design-builder is already an existing client or a new one, whether there is the potential for future work, and how their company cultures match your own firm's.

## 3. External Project Considerations

*Objective data about the project.*

Assess the scope and size of the project, funding status, budget, schedule, project history, and politics are all considerations for any firm considering the pursuit.

## 4. Internal Project Considerations

*These focus on your own team's capacity and capabilities.*

Evaluate what design services are required, whether your firm has experience and project management leadership in design-build, what engineers and other consultants need to be on your team, and what added value your firm can provide.

## 5. Risk and Financial Analysis

*These items address compensation for design concepts, fees and profitability, professional liability coverage, and contracts.*

Understand the cost to your firm to pursue the project opportunity. If the owner is requesting a design concept as part of the proposal submittal: How will you be compensated for that effort? Is there a stipend from the owner and/or success fee from the contracting entity (likely the general contractor) offered? If the fee structure is not optimal in the pursuit phase, is there an opportunity for additional fees to be negotiated upon selection?

## 5. Risk and Financial Analysis (continued)

For the prime design professional: Do you have adequate professional liability coverage for the size and scope of the project?

Is the contract fair? Does it include construction duties or responsibilities that are inconsistent with design services? Will Design-Builder negotiate terms and conditions? The following clauses should be included in your agreement when working on a Design-Build project: Standard of Care, Disclaimer of Construction Responsibility, Indemnification, Document Ownership, and Quantity/Cost-Estimating Disclaimer.

For engineers and subconsultants: Do you have access to and understand the prime agreement? Can you disclaim certain flow down terms, such as indemnity and liquidated damages?

## 6. Design-Build Team Considerations

*These focus on the experience and relationships among the parties, process alignment, and contracts.*

Arguably, the most critical consideration is understanding your general contractor partner and having an established positive working relationship with them. Generally, the design-build contractor is going to hold the contract with the owner and, consequently, they will be your actual client.

Evaluate the working relationship (or intention to build one), a clearly defined teaming agreement outlining responsibilities, fees, and terms and conditions, and an alignment of processes, including use of BIM and project management tools.

In addition, the prime design firm must have strong and experienced project management to lead the design team in a cooperative manner with the design-builder.

## 7. Your Win Strategy

*This section focuses on several elements that combine for a winning strategy.*

Determine whether there is a match between the owner's and design-builder's needs with your experience, and whether (and how) you can distinguish your firm and team as the best choice for the owner and design-builder.

Berkley DP has developed a tool that assists in the detailed evaluation of these considerations. The Design-Build Go/No-Go Process and Checklist on the following pages will help guide you in collecting the necessary data to make a well-informed decision on pursuing a design-build project. Using this analysis tool will facilitate efficient use of your firm's valuable marketing and overhead labor resources and will help you focus on the pursuit of projects that your firm has the best chance of winning and then delivering successfully. It also includes a section for estimating the cost of the pursuit, both labor and expenses, which may impact your decision.

While still subjective, this template will help you manage your efforts to enable a thoughtful decision for each new potential design-build project.

*Note: this tool can be utilized by the prime consultant or by a subconsultant. Rows that feature the subconsultant's perspective are shaded in gray.*



For other delivery methods, please refer to Go/No-Go Project information Checklist.  
<https://www.berkleydp.com/risk-management/risk-resources/>

# Design-Build Go/No-Go Project Information Checklist



NARRATIVE		Insert + (plus) or – (minus) indicating a positive or negative element for your firm or NA in this column		
Project Name		NA		
Owner		NA		
Design Builder (General Contractor)		NA		
Location		NA		
<b>OWNER/D-B INFORMATION</b>	<b>OWNER</b>	<b>DESIGN-BUILDER</b>	<b>O</b> + / – / NA	<b>DB</b> + / – / NA
<b>EXTERNAL CONSIDERATIONS</b>				
Experience in project type and project delivery method (CM, D-B, other)				
Reputation for quality projects				
Financial capability				
History of litigation				
Who are the key decision-makers?				
<b>INTERNAL (FIRM) CONSIDERATIONS</b>				
Previous experience working with? If no, do they know us?				
Future work?				
Culture aligned?				
<b>PROJECT INFORMATION</b>			<b>+ / – / NA</b>	
<b>EXTERNAL CONSIDERATIONS</b>				
Scope				
Size				
Project location				
Budget (project, construction cost)				
Schedule for selection				
Schedule for completion				



## NARRATIVE

Insert + (plus) or – (minus) indicating a positive or negative element for your firm or NA in this column

PROJECT INFORMATION (continued)		+ / – / NA
EXTERNAL CONSIDERATIONS (continued)		
History behind project		
Funding source/status		
Regulations and entitlements affecting project		
Political considerations impacting project viability and process		
Source of lead		
What is the decision-making process for team selection?		
Is DBE (SB/MBE/WBE/DV) a factor?		
INTERNAL (FIRM) CONSIDERATIONS		
Do we have the appropriate experience and project management leadership in design-build?		
List the design services required that we provide in-house		
List the engineering/architecture/other subconsulting services and potential firms under our contract		
RISK AND FINANCIAL ANALYSIS		+ / – / NA
If the owner is requesting a design concept as part of the proposal submittal, will it be compensated, such as a stipend or success fee? (If not, is there an opportunity for additional fees to be negotiated upon selection?)		
Overall fee/profitability potential		
Do we have adequate professional liability coverage for the size and scope of the project?		

# Design-Build Go/No-Go Project Information Checklist



## NARRATIVE

Insert + (plus) or – (minus) indicating a positive or negative element for your firm or NA in this column

RISK AND FINANCIAL ANALYSIS (continued)		+ / – / NA
Is the contract fair? Will Design-Builder negotiate terms and conditions? (Standard of Care, Disclaimer of Construction Responsibility, Indemnification, Document Ownership, Quantity/Cost-Estimating Disclaimer)		
If a subconsultant to the prime: Can we disclaim certain flow down terms, such as indemnity, warranty/guarantee, and liquidated damages?		
TEAMING INFORMATION		+ / – / NA
Does the design-builder and its proposed team have experience in the project type?		
Does the design-builder and its proposed team have experience with owner?		
Does our firm and the design-builder (general contractor) have prior experience working together in a positive manner?		
Is there a teaming agreement in place, and is it fair?		
List engineering/architecture/other sub-consulting services and potential firms directly to be contracted by design-builder or owner		
Are our processes aligned (BIM, progress design document submissions, project management tools)?		
Is the design-builder and/or owner willing to negotiate contract terms and conditions?		
If a subconsultant to the prime: Does the prime consultant have strong and experienced project management to lead the design team in a cooperative manner with the DB?		

NARRATIVE		Insert + (plus) or – (minus) indicating a positive or negative element for your firm or NA in this column
WIN STRATEGY: EIGHT ESSENTIAL ELEMENTS		+ / – / NA
1. Does the project contribute to the mission of our firm?		
2. Does our internal team’s capabilities and experience match well with design-builder and owner’s needs and expectations?		
3. Do we have an experienced PM and other appropriate staff available?		
4. Who is the competition?		
5. How can we distinguish ourselves from the competition?		
6. Our most important message		
7. What resources/connections do we have to help us get selected?		
8. What is the realistic probability of winning the project (%)?		
OTHER CRITERIA		+ / – / NA

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### SCORING

Total Number of Pluses		
Total Pluses Divided by Total # Answered		%

≥70% = GO  
 50-60% = CONSIDER WITH CARE  
 <50% = NO GO

MARKETING BUDGET	NOTES	\$
Marketing labor/submittal		
Technical labor/submittal		
Expenses/submittal		
Marketing labor/interview		
Technical labor/interview		
Expenses/interview		
<b>TOTAL</b>		

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