USING THE STATEWIDE SMALL WORKS ROSTER

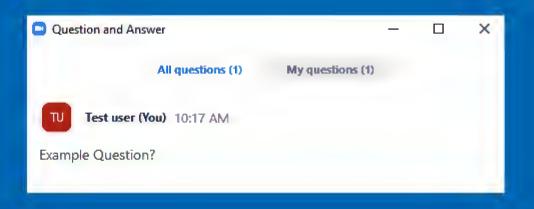






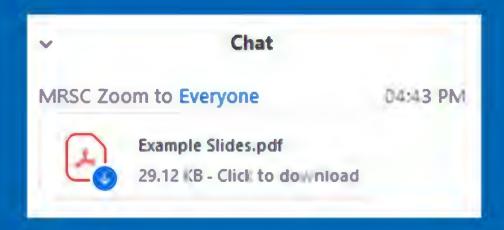
To submit content-related or technical questions, use the Q&A feature

To open the Q&A, press the button at the bottom of your screen



To download the presentation slides, use the Chat feature

To open the Chat, press the Chat button at the bottom of your screen

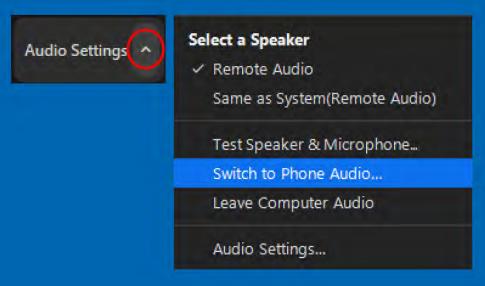


Typing in the Chat is disabled



Zoom Webinar: Audio and Captions

To adjust audio settings or switch to a phone, click the Audio Settings button:



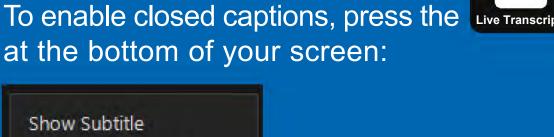
For switching to phone audio, dial the highest number listed (closest to your area), enter the Meeting/Participant ID at the bottom of your screen:

View Full Transcript

Subtitle Settings...

CC

Live Transcript



You may either show subtitles or view the full transcript

For more support: **206-625-1300 ex.19**

MRSC ROSTERS TEAM MEMBERS

- Jon Rose (Facilitator) Finance & Administration Manager
- Lisa Lagerstrom Rosters Lead
- Theresa Gonzales Rosters Coordinator
- Brynn Linville Program Support



Aleanna Kondelis
Contract Consultant
Public Procurement Partners of Washington
pwtraining@mrsc.org, a.Kondelis@ppp-wa.com



Jon Rose



Lisa Lagerstrom



Theresa Gonzales



Brynn Linville

MRSCRosters@mrsc.org

AGENDA

- 1. Overview of the statewide small works roster platform
- 2. Generating a project-specific roster
- Using a project-specific roster for Direct Contracting
- 4. Bidding and award (outside MRSC Roster's platform)
- 5. Adding bidding and award data and publicly available information
- 6. Demonstration
- 7. Questions
- 8. Resources and trainings

ABOUT TODAY'S SESSION

What we will cover in today's session

- Using the statewide small works platform
- Searching registered contractors
- Building a project-specific roster
- Documenting

What we will support after the session

- Statutes
- Policies, processes, and procedures
- Additional resources
- More small works roster training opportunities

Polling Question

How many of you use the MRSC Small Works Roster?

- 1. Yes, looking forward to the updates
- 2. Thinking about it
- 3. No, I think I'll use my own
- 4. What is the MRSC statewide small works roster?

BEFORE USING THE STATEWIDE SMALL WORKS ROSTER

Am I ready to use the statewide small works roster?

Resolutions, polices, processes, and procedures updated

Is small works the right contracting method?

- Estimated contract amount (\$350,000 or less, under \$150,000?)
- Is it a service that pays prevailing wage vs. a construction project?
- Project type
- Primary work category
- What contractors are currently registered in the target project type and work category

THE NEW STATEWIDE SMALL WORKS ROSTER PLATFORM

What's different?

- New look and feel (past the landing page)
- Account settings, allowed to add as many administrators and account users as needed
- Over \$150,000 under \$150,000 (no limited works)
- Project Types
- Categories
- Documenting bids and award, publicly available information
- Agency Dashboard

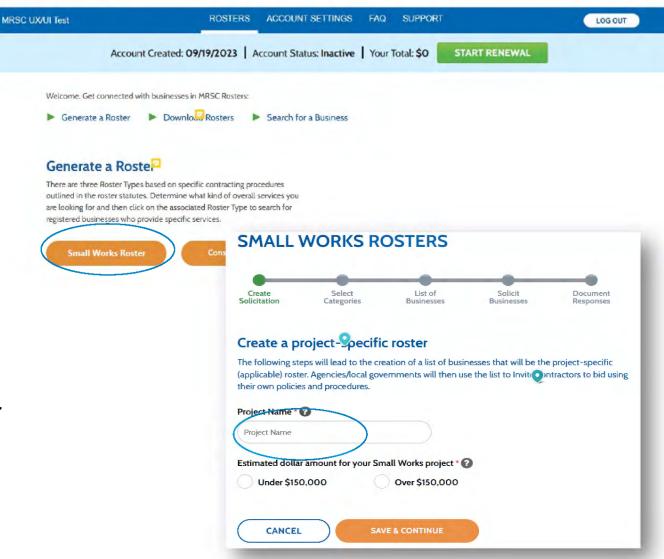




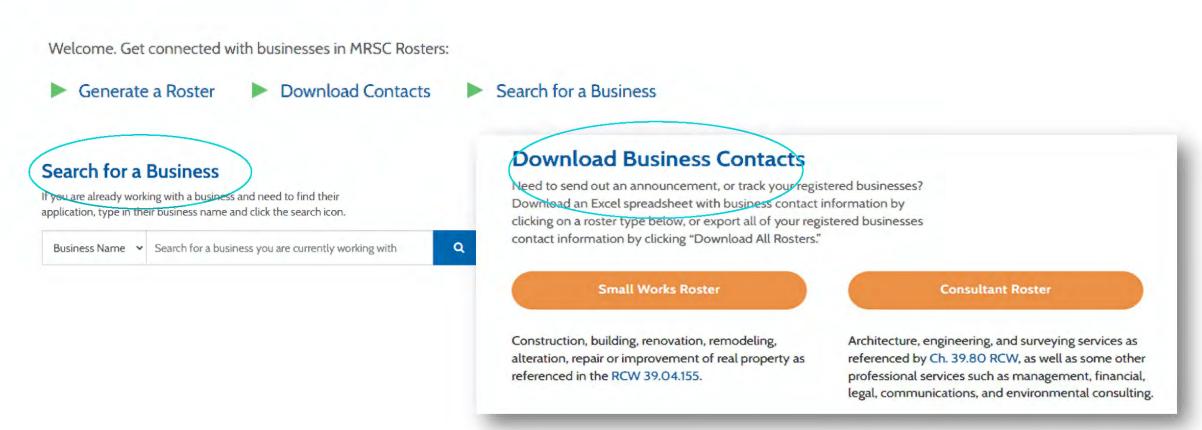


WHEN YOU FIRST ENTER

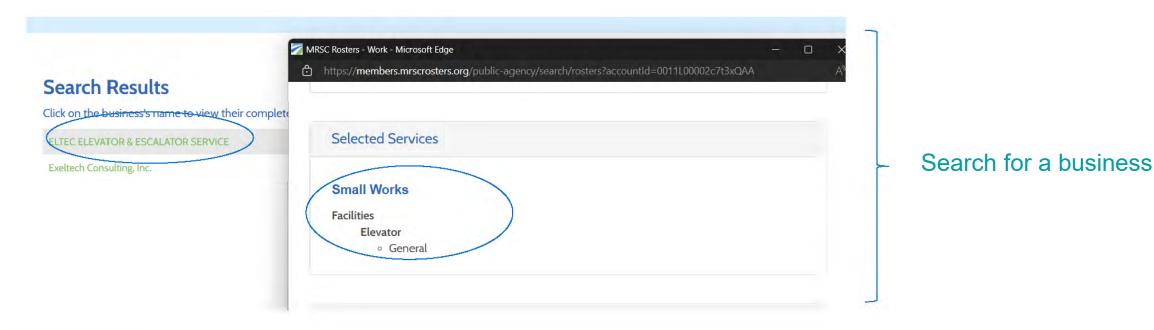
- 1. Log In
- Select "small works"
- 3. Enter project name
 - Your agency name and number.
 Same that will be on your internal documents and
- 4. Select if your project estimate is over \$150,000 or under \$150,000



How do I **search** "the roster" without creating a project-specific roster record?



SEARCHING "THE ROSTER"



Concrete and Masonry, Earthwork, Roadway Construction, Repair, and Maintenance, Site Improvement, Repair, and Maintenance, Storm Drainage Facility Construction, Repair, and Maintenance, Vegetation Work, Water Facility



Download your business contacts

Tiffany Gilthvedt

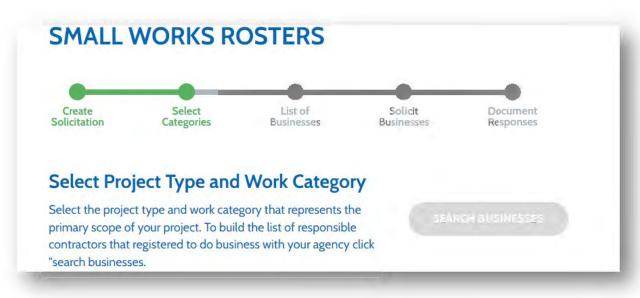
1794 Excavating LLC

KEY TAKEAWAYS

- Plan your project before starting a new project-specific roster around a specific project type and work category
- Projects should be ready to solicit with estimates and invitation documents
- 3. If you are not confident that your project-specific roster will produce a viable list of contractors, use the various search tools or pull an initial list and don't lock it in.
- 4. Don't be nervous about pulling an initial "list," you don't have to lock it in.

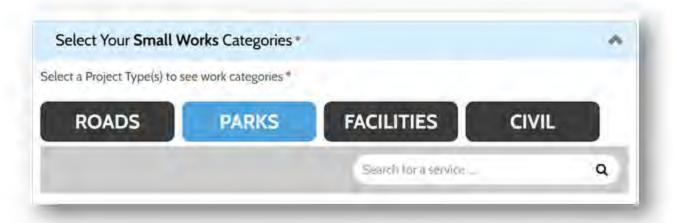
GENERATING A PROJECT SPECIFIC ROSTER

- Select "Project Type" and "(work) category"
- The statewide roster performs best if there is only 1 project type and category selected, which represents the primary work and would focus on the prime that would be able to perform the work

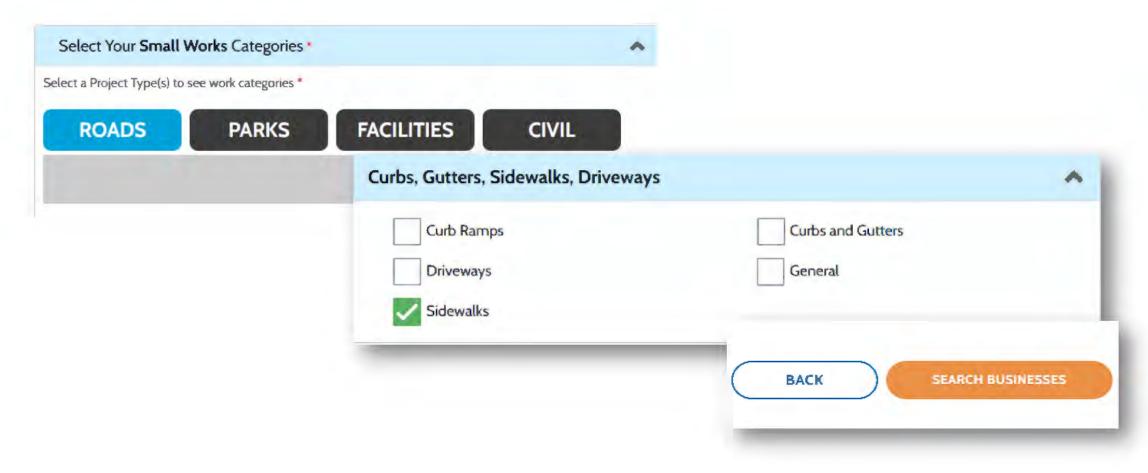


Why are there Project Types? And why only 4.

- With so many users of the statewide roster, business and agencies, we need ways to focus on different work scopes.
- Buildings/Facilities, Parks, Civil, and Roads covers 95% of roster projects over the last several years (based on L&I data)

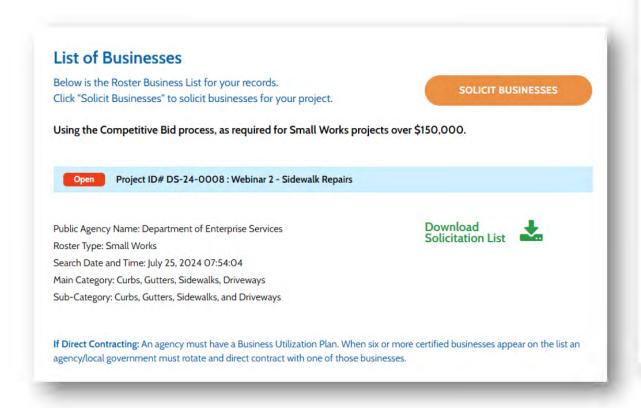


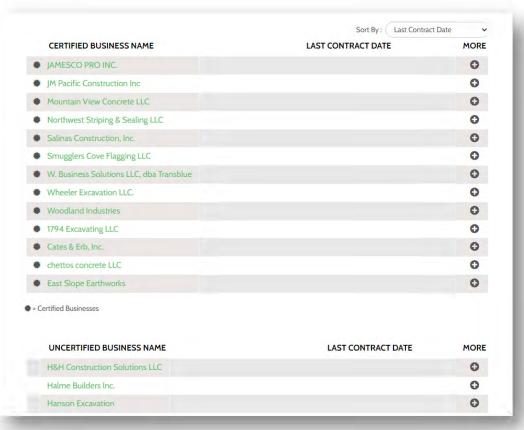
GENERATING A PROJECT SPECIFIC ROSTER



ANALYZING A PROJECT SPECIFIC ROSTER

Before your project-specific roster gets locked in.





GENERATING A PROJECT SPECIFIC ROSTER

- Selecting "solicit businesses" is the point where you "lock in" your project-specific roster.
- This is the point where no additional contractors can be added.
- If you need to recruit or find more bidders, don't "solicit"



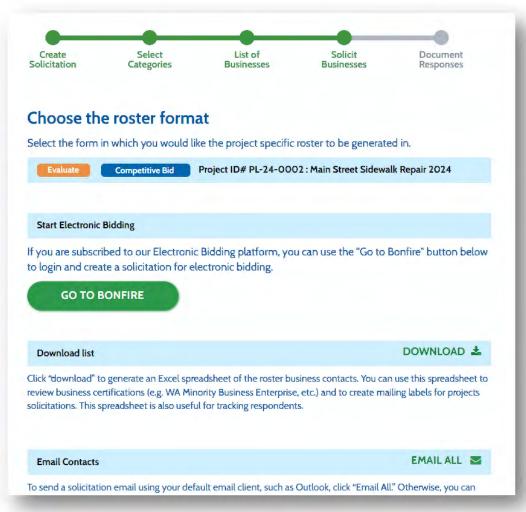
GENERATING A PROJECT SPECIFIC ROSTER

Solicit Businesses

Where are you going to send your list?

"Solicitation" (list) Options

- Go to Bonfire
- Download an ".xls" file
- Copy addresses to outlook (email)



BIDDING AND AWARDING

Key Takeaways:

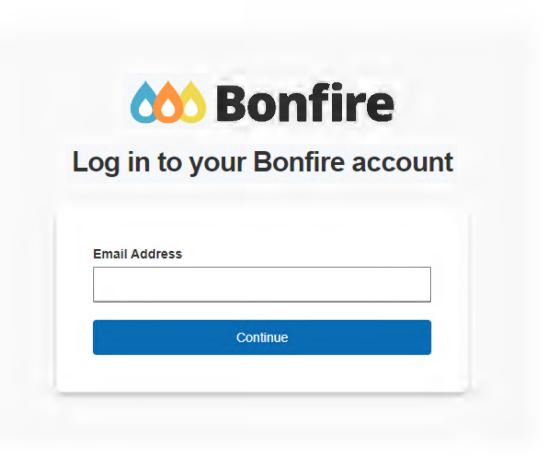
- Use the same process as any other procurement, except only invite your project specific roster contractors
- Outside MRSC Rosters

Public | Purchase~





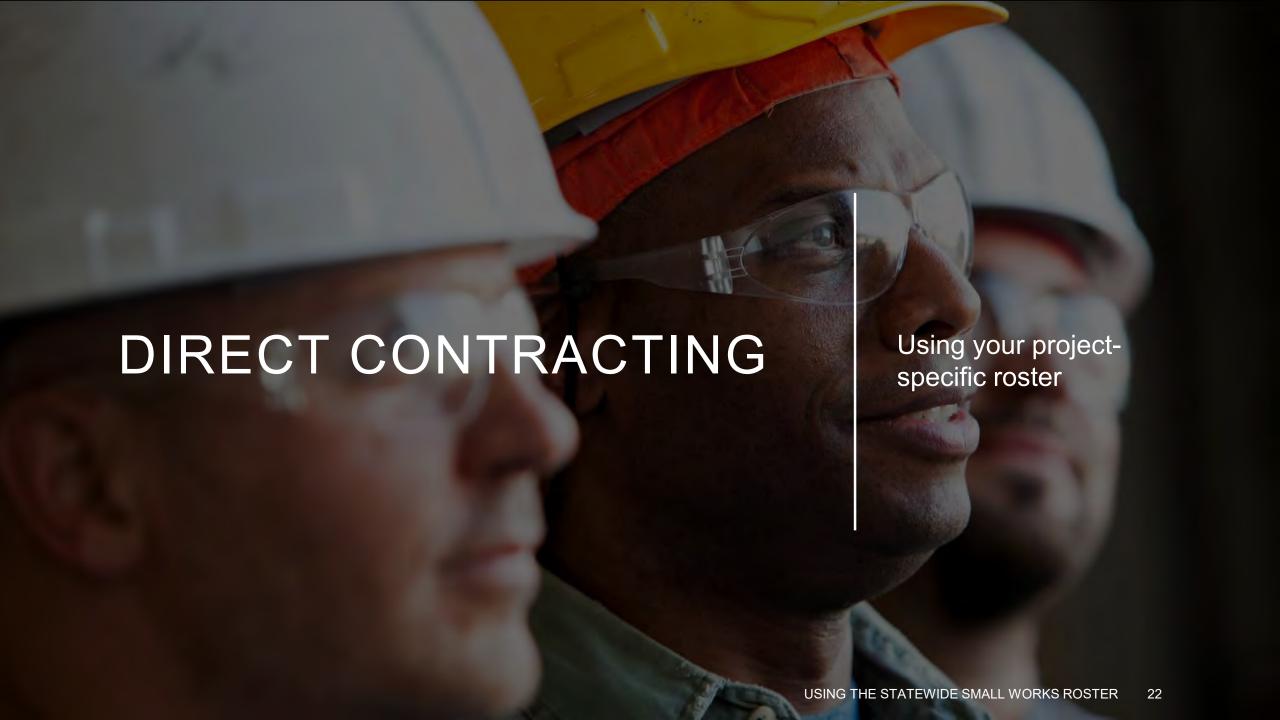




BIDDING AND AWARDING

Key Takeaways:

- Contractors that are on your project-specific roster also need to be registered in your electronic bidding application. The statewide small works roster DOES NOT "talk" to your application.
- Invitations ONLY go to your project specific roster. Don't turn on the "public" facing opportunity.
- Follow your local policies and procedures like any other public works projects.
 (ex., supplemental bidder responsibility criteria, addenda, site walks or prebids, lowest responsive and responsible, etc.)



Polling Question

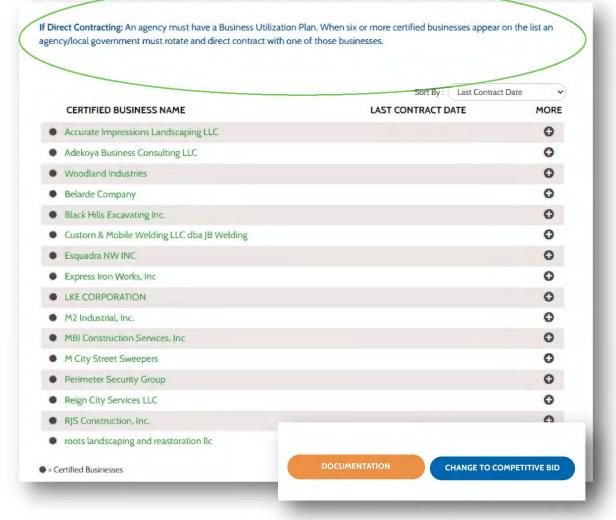
How many are ready to direct contract with a business utilization plan and a rotation policy?

- 1. Ready to go!
- 2. Working on it
- 3. Still have questions
- 4. Huh?

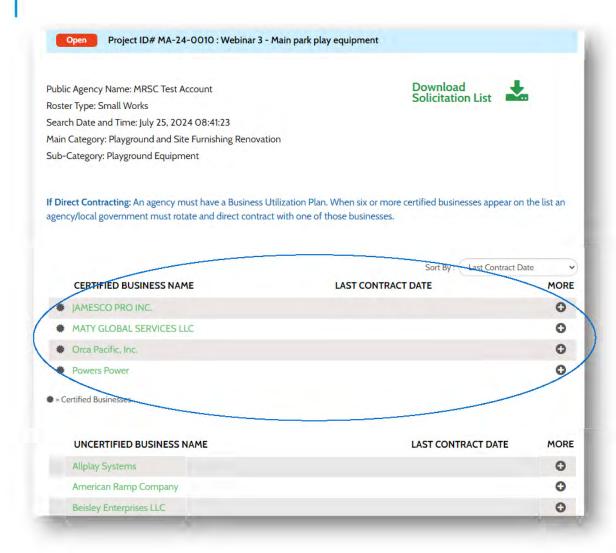
Rule of Six

DIRECT CONTRACTING

SMALL WORKS ROSTERS Select List of Solicit Document Solicitation **Businesses Businesses** Responses **List of Businesses** Below is the Roster Business List for your records. SOLICIT BUSINESSES Click "Solicit Businesses" to solicit businesses for your project. Which Small Works Roster Process do you intend to use? * ? Competitive Bid Direct Contracting Open Project ID# PL-24-0001 : Levana Test 718 ublic Agency Name: Public Agency Levana Download Solicitation List Roster Type: Small Works Search Date and Time: July 18, 2024 14:36:54 Main Category: Fencing Sub-Category: General



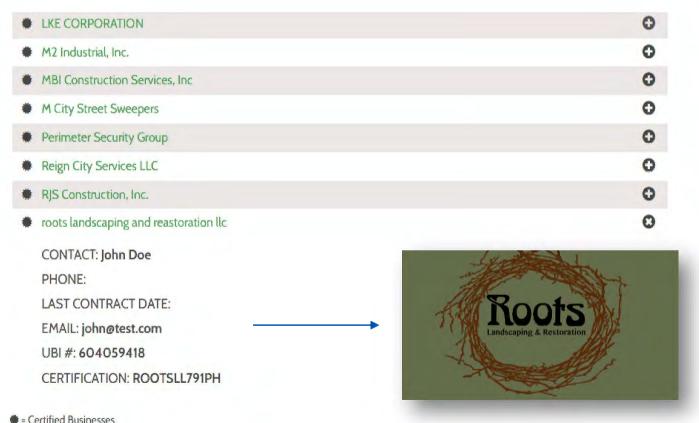
DIRECT CONTRACTING



Five or Fewer

- Consult your Business Utilization Plan
- Rotate through any contractor

DIRECT CONTRACTING





Direct Contracting Practices

- 1. Interest email: ...you are the next *rotated business* on the project-specific roster, are you interested in bidding? No other bidders will be contacted unless you decline, or we are unable to reach agreement on the price.
- Email the solicitation/bidding package: Invitation, Scope, Bid/Negotiation Form, etc.
- 3. Reach agreement
- 4. Award
- 5. Document

DIRECT CONTRACTING

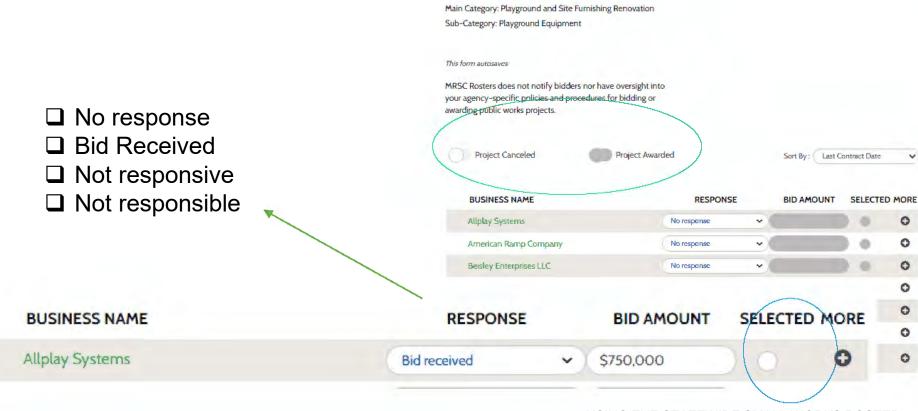
Key Takeaways:

- 1. Must have a Business Utilization Plan prior to soliciting
- 2. Must have a rotation policy
- Must have an approach to invite and accept a bid from a single contractor
- 4. Only engage one contractor at a time
- If a bid is not accepted/acceptable, have strong rationale and documentation as to why



Adding your bidding and award data into the statewide platform

DOCUMENTATION



Document Small Works

the Small Works Roster data page.

Public Agency Name: MRSC Test Account

Search Date and Time: July 25, 2024 08:41:23

Roster Type: Small Works

projects.

Enter responses or outcomes for every contractor on the project-specific roster. Once a determination has been made to award, indicate by clicking "selected." After award, slide the "Project Awarded" toggle and the project will appear on

All bidding and award information is to be kept in agency/local government procurement files and available upon request. Local governments and agencies must follow their local policies for bidding and awarding public works

Competitive Bid Project ID# MA-24-0010 : Webinar 3 - Main park play equipment

DOCUMENTATION

SMALL WORKS ROSTERS



Document Small Works

Enter responses or outcomes for every contractor on the project-specific roster. Once a determination has be to award, indicate by clicking "selected." After award, slide the "Project Awarded" toggle and the project will appear on the Small Works Roster data page.

All bidding and award information is to be kept in agency/local government procurement files and available upon request. Local governments and agencies must follow their local policies for bidding and awarding public works projects.

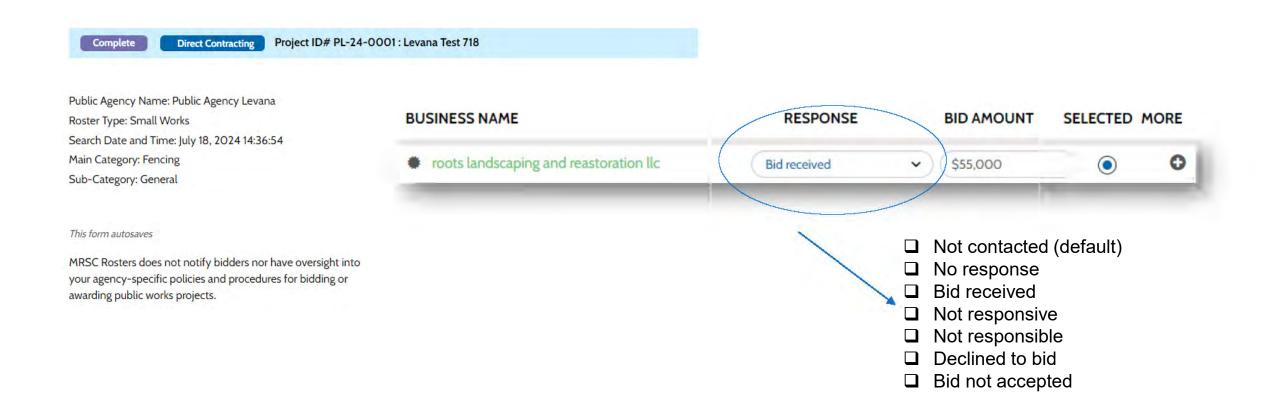
Once an agency has announced the responsive and responsible contractor, notice of award is sent and the appropriate bonding and insurance is collected, followed by signatures on the contract by both the contractor and your agency. By selecting "award" in the system, you are documenting this final exchange of information is complete and a fully executed contract is on file with your agency. Proceed to entering your project, as awarded, in the Awarding Agency portal L&I. (link)

CANCEL

CONFIRM

DOCUMENTATION

DOCUMENTATION: DIRECT CONTRACTING



PUBLICLY AVAILABLE INFORMATION







MRSC SMALL WORKS DATA

The following lists the awarded small works roster projects as documented in MRSC Rosters. MRSC only records those projects and rosters generated using MRSC Rosters. Agencies/local governments may use their own roster and post their own data separately. As required by RCW 39.04.152(6) after an award is made the information shall be recorded and publicly available. MRSC does not keep any physical bidding or award documentation. To request copies of documents please contact the Awarding Agency directly.



Solicitation date	Project ID #	Project Name	Prosess	Awarding Agency	Business Name	Award Amount	More
2024-07-01	CL-24-0001	188th St SW As	Competitive Bid	City of Lynnwood	Olympic Paving,	\$16,000	0
2024-07-02	PC-24-0001	Culvert and La	Competitive Bid	Public Utility Di	NW Utility Servi	\$82,642	0

EXPORT DATASET

1 to 2 of 2



AGENCY DASHBOARD

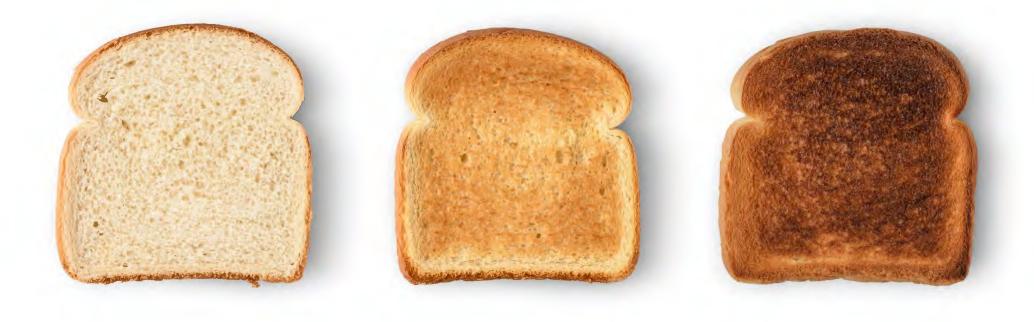
Helping each agency track all small works solicitation and contracts



Can I delete "test" rosters or "mistaken" rosters?

- Not at this time, you may "hide" them.
- This is under further consideration and changes will most likely be made soon so at least the "test" projects are deleted.
- A reminder that "test" projects should not be necessary.

DEMONSTRATION





Answering questions in the Q&A.

QUESTIONS

What do I do if there are no contractors in the category, not the contractor I was looking for, etc.?

- Go "back" and add more categories
- 2. Contact MRSC to find out if there was a "mix up" behind the scenes
- 3. Recruit to the category

Trouble Shooting

- Was the contractor in the same category before July 1
- Is this a new category for your agency
- Contractors that might need to update their registration

Continued...

Example: Ballfield, Netting

Expect to see:

- Coastal Netting
- Beacon Athletics
- Versatile Sports Netting

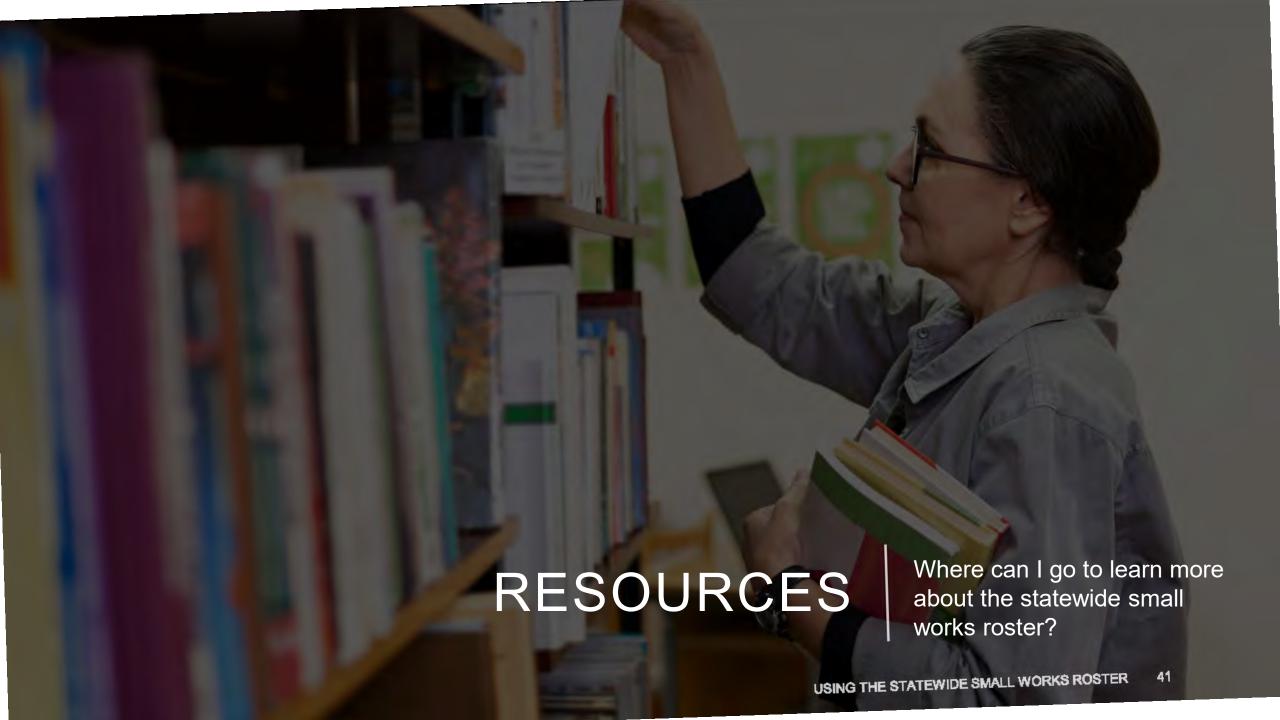
Trouble Shooting

- Were the companies aware you needed these services in this location (e.g., county)
- Were they registered before in a different category

I started my solicitation in June and have a list of contractors I have been collecting bids from. How do I document the award that occurred after July 1, I can't recreate the exact list in the new small works platform?

- The statewide platform and the "reporting" or documentation function is only available for solicitations and project-specific rosters that start in the new platform.
- Previously pulled lists, and any subsequent awards will have to be documented separately on a public agency's own records or site.
- In the statewide small works platform, you cannot add a bidder to a list after the project-specific roster has been created.





RESOURCES AND TRAININGS

Roster Manual

- "Preparing for the Future" Materials
 - Slide Deck
 - Handout
 - Q&A
- Email <u>mrscrosters@mrsc.org</u>
- Updates as the roster evolves and improves

Small Works Roster Manual 2024

This e-publication provides a comprehensive overview of small public works rosters for local and state government agencies in Washington State, with an emphasis on the statewide public works roster administered by MRSC Rosters (mrscrosters.org).

Please note that the Small Works Roster Manual is formatted as a series of webpages (links below), not a PDF document. We no longer offer a PDF copy of the manual.

Small Works Roster Training Materials

MRSC conducted two free, in-person workshops in May 2024 on "Preparing for the Future: Changes to the Small Works Roster." Below are the resources from those training sessions:

- · "Preparing for the Future" Slide Deck
- Workshop Handout Includes sample scope development checklist, bidder responsibility checklist, ordinance/resolution, rotation policy, and business utilization plan
- Q&A and Key Takeaways Answers many questions asked at the workshops as well as additional questions received outside the workshops

Upcoming Trainings



Webinars

- Using PWIA Portal September
- Electronic Bidding October
- Good Faith Efforts November
- Owner Readiness December
- Direct Contracting January
- And more!

Public Works Fundamentals (In-Person)

- Bellingham November 14
- Vancouver March 27
- Puget Sound April 17
- Tri-Cities May 22
- Sequim May 29

Sign up for our training e-newsletter at mrsc.org/e-news

Thank You!

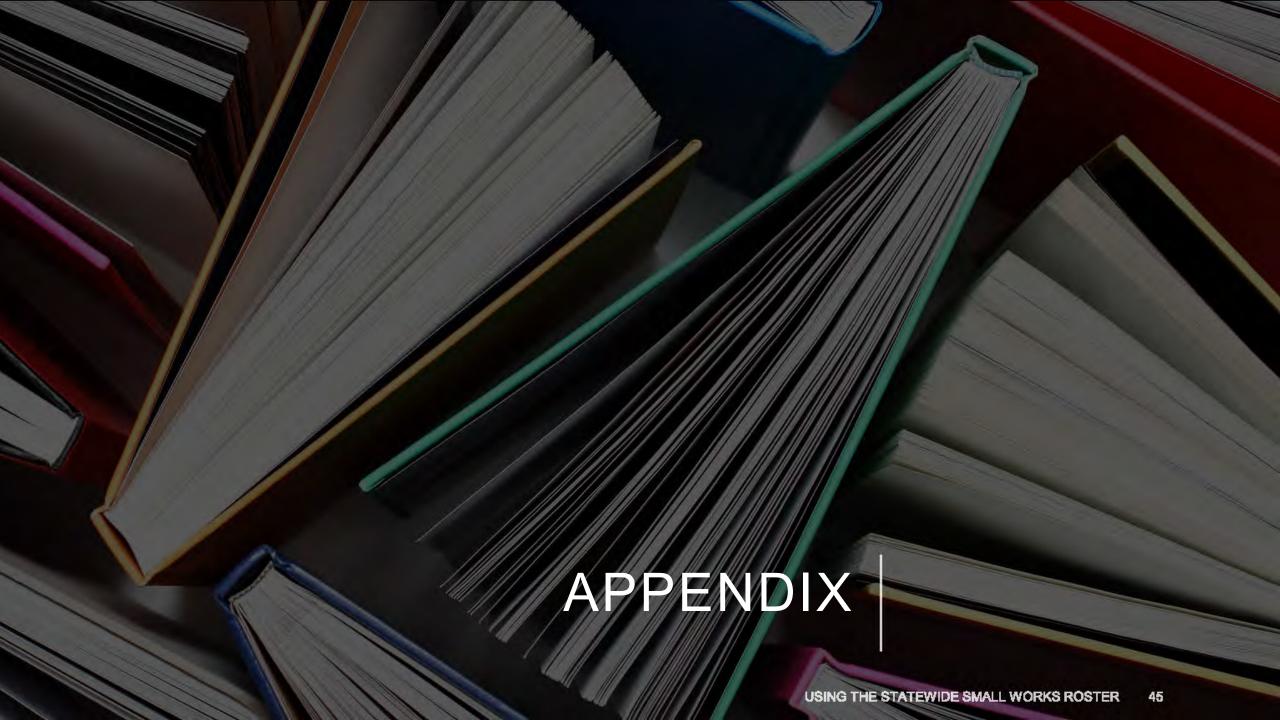
Additional Questions?

Submit your questions to mrsc.org or pwtraining@mrsc.org

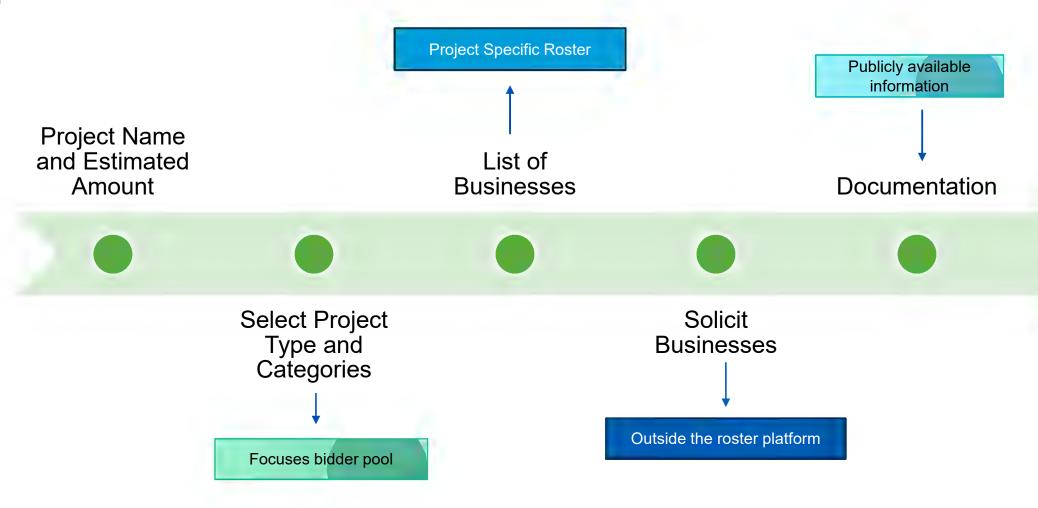
Call MRSC Rosters at 206-625-1300 X14

Please fill out the training evaluation survey





STATEWIDE SMALL WORKS ROSTER "WORKFLOW"



PUBLIC WORKS VS. SMALL WORKS

Small Works are small public works, small works projects have a slightly different definition now

RCW 39.04.010(5)	RCW 39.04.152(1)		
All work	Construction		
Construction	Building		
Alteration	Renovation		
Repair	Remodeling		
Improvement	Alteration		
Not ordinary maintenance (WAC 296-127-010)	Repair		
	Improvement		