

**Sample RFP incorporating Qualifications Based Selection
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This document is a general guideline to a Qualifications Based Selection (1 or 2 step) solicitation for design services. The agency may have additional, or slightly different, specific requirements, based on their procurement laws and policies. Italic font denotes "conversational" issues to consider as the RFP is developed; regular font indicates recommended language.

RFP Announcement: This summary page should be posted and advertised extensively to invite participation in the RFP. Typically, advertisement is made in as an Invitation for Proposals (NOT Bids) in the legal classified ads.

Planning, Design, & Construction Administration Services for

_____ *(building type)*

SCOPE OF SERVICES: *Provide brief summary (2-3 sentences) of the scope of requested.*

PRE-PROPOSAL MEETING: A *(non)* mandatory pre-proposal meeting will be held _____ *(date, time, place)*. Persons interested in submitting proposals are *(encouraged)* required to attend. Conference call capability will be available for the Pre-Proposal meeting. Proposers intending to participate via conference call shall notify _____ *(person, contact info)*. *Technology is your friend: consider Skype, GoToMeeting, and other live communication media for the Pre-Proposal meeting.*

QUESTIONS REGARDING THIS RFP: *Indicate specific contact person, and his/her phone, email.* _____ *(person)* is the sole point of contact for all issues pertaining to this procurement. No oral interpretations concerning this RFP will be made to any person. **Requests for an interpretation must be made in writing** and delivered in person, by fax, or email to _____ *(person)* **at least 4 days before the submittal date.**

DEADLINE FOR PROPOSALS: ____ *(number)* copies of sealed proposals will be **received until date, time**, or such later time as the Procurement Officer may announce by addendum to RFP holders at any time prior to the submittal date. Late proposals will not be accepted and will be returned, unopened.

NOTE: Mailing/delivery times to Alaska may take longer than other areas of the U.S.

Proposal documents may be delivered via *(hard copy, electronic, fax)* to: _____ *(address, email, fax, etc.)*.

Request for Proposals Sample Text

1.0 GENERAL INFORMATION

Provide a brief summary about the Request for Proposals (RFP) process, project funding and other appropriate general information.

1.1 Purpose

The purpose of this document is to solicit proposals from experienced design consultants to provide _____ (*describe type of professional services needed*). The initial services will include _____. The contract may be amended to include other related work as the design and construction process evolves.

1.2 Scope of Services

Describe the specific services needed, such as pre-design, programming, site analysis, cost estimating, life-cycle costing, conceptual design, design development, construction documents, construction administration, commissioning, etc. Write the scope in broad enough terms that you can capture the possible future needs, but also with enough specificity to get the expertise you desire.

Describe specialized services such as environmental permitting, traffic engineering, facility operational issues, energy conservation measures, special funding requirements (such as FAA), and the need for excellent communication, facilitation, consensus building, and/or negotiating skills.

1.3 Completion

Lay out the expected general time line for the project and needed professional services, noting any critical milestones.

1.4 Background

Provide a few paragraphs that outline the context for this RFP – describe the community, the school district (for school projects), and background information about project that will help consultants get to know your needs.

1.5 Questions

Contact _____ (*person, contact info*) for all questions regarding this proposal.

1.6 Standard Contract Language

Standard contract clauses, typical design scope of services, compensation based on lump sum and time/ expenses, and insurance requirements, (*shown as attachment*).

2.0 RULES GOVERNING COMPETITION

2.1 Examination of the RFP:

Proposers should carefully examine the entire RFP and any addenda thereto, and all related materials and data referenced in the RFP. Proposers should become fully aware

of the nature of the services requested and the conditions likely to be encountered in performing the services.

2.2 Proposal Development

The content of proposals will be kept confidential until the selection of the Consultant is publicly announced. All materials submitted in response to this RFP will become the property of the Owner. One copy shall be retained for the official files of the _____ (procurement office) and will become public record after announcement of the successful Proposer. The Owner will not return proposals to the Proposer.

2.3 Proposal Submission Process

Proposals are to be prepared in such a way as to provide a straightforward, concise delineation of the Proposer's capabilities to satisfy the requirements of this RFP. Emphasis should be concentrated on conformance to the RFP instructions, responsiveness to the RFP requirements, and on completeness and clarity of content.

This solicitation does not commit the Owner to select any Consultant for the requested services. All costs associated with the respondents' preparations and submission shall be the responsibility of the Proposer.

3.0 PROPOSAL CONTENT REQUIREMENTS

Proposers should organize the Proposal in a logical and clear manner, and should include the following:

- Title Page that notes the RFP subject, the name of the firm, address, telephone numbers, and name of contact person. Include names of all proposed sub-consultants.
- Table of Contents that clearly identify the information in the Proposal document.
- Letter of Transmittal that is signed by a corporate officer who has authority to bind the firm, indicates that the firm is appropriately licensed in Alaska for the requested scope of services, and acknowledges receipt of all addenda.
- Evidence of experience and expertise that aligns with the RFP Evaluation Criteria.

3.1 Scope of Services (should not exceed __ pages)

Discuss the specific expectations for each type of service being requested.

Initial Project Orientation, Planning and Conceptual Design: Describe the general approach and individual tasks recommended for the efficient and comprehensive planning and conceptual design work.

Design: Describe the firm's approach to developing schematic design options that use a collaborative multi-disciplinary team approach that includes the Owner as an active participant. How will the firm approach project milestone reviews and keep the Owner's governing board informed of progress and milestones, while remaining efficient throughout the design process?

Discuss the firm's design approach to _____ (*building type*) facilities and how this philosophy might affect the scope of services. How does the firm work with Owners to understand their expectations for the quality of materials and priorities within the

construction budget? Discuss the firm's approach to sustainable design in context with _____ (*location*)'s challenging geographic, economic, and climatic conditions.

Describe the firm's approach to the coordination of construction drawings and technical specifications; providing high quality documents to the Owner that reflect the accepted design; and collaboratively refining the design with the Owner during the construction documents phase, but also refrain from substantive design changes?

Construction Cost Estimates: Given recent inflation and labor trends in construction, what specific measures would you introduce into each design phase to improve the accuracy of construction cost estimates? What are the unique construction issues you see in _____ (*location*) that may be reflected in the project cost?

Construction Administration: Discuss the firm's approach to construction administration, especially with projects that are not located in close proximity to the home office. What services are essential for the Consultant to provide, and what services can be provided by third parties without compromising the design?

3.2 History and Experience (should not exceed ___ pages)

Provide descriptions of at least ___ projects completed in recent years that are similar in building type and/or scope to the project described in this RFP. Provide company names and contact information of references for each of the projects. Describe the full consultant team and roles of individuals also proposed in this RFP, design and procurement process used, special considerations of the project, and information about the project budget and schedule.

Provide general background information for the prime consultant firm including specialized experience, capabilities, and unique qualifications in _____ (*building type*) facilities. Discuss the firm's experience in the specific professional services requested, including expertise in contemporary design issues such as sustainability.

3.3 Organization & Personnel Qualifications (should not exceed ___ pages)

Proposals should address all planning, design, and construction administration services requested for this project. Specify the Consultant Team's Project Manager and furnish brief (no more than one page each) resumes for key persons of the team who are proposed to provide leadership, management, and/or specialized services for the project, and document the specific role and involvement of each person proposed. Also include resumes for persons who will be charged with the day to day responsibility for carrying out the project. Document the team's expertise of operational issues associated with the type of facility of this RFP through their participation in seminars, professional organizations, and/or formalized educational study.

Describe the prime consultant's experience and relationships with proposed subconsultants, including its ability to build an effective project team. Note past projects that members of the team have worked on together. Demonstrate expertise in collaborative problem solving, peer review, and quality control.

Describe how this project fits into the firm's overall organization. What is the philosophy of the firm, the types of projects historically completed, and the specialized expertise in public infrastructure projects and sustainable design?

3.4 Project Execution (should not exceed ___ pages)

Propose one or more project methodologies that will produce an effective planning and design process. The approach must provide high quality results for the Owner while maintaining efficiencies and minimizing unnecessary time and cost. Discuss the firm's approach to consensus building with multiple and sometimes conflicting needs. Describe how you build cooperation among stakeholders while maintaining project management control. Discuss your ability to keep the team organized and on track to meet project deadlines.

Discuss the firm's experience with construction related claims that resulted in additional expense to the owner because of design error/omission. How were the owner's interests represented? Was the owner compensated either directly or indirectly, for errors? What methods/measures do you typically use during the design process to minimize errors?

4.0 EVALUATION OF PROPOSALS

4.1 Criteria

Written proposals will be evaluated and scored using the criteria listed on the WRITTEN EVALUATION/RANKING page in order to ascertain which proposal best meets the needs of the project. The items to be considered during the evaluation of written proposals and the associated point values are described on the evaluation form.

Following evaluation of written proposals, the Selection Committee may short-list at least two firms and conduct oral interviews. Such interviews, if held, shall be done in accordance with the process discussed below. Oral interviews will be scored in accordance with criteria listed on the ORAL INTERVIEW EVALUTION/RANKING page.

4.2 Evaluation Process

Evaluation of the written proposals and oral interviews, if held, will be performed by a 5-member Selection Committee. Written proposals will form the basis for selection of the consultant teams to be short-listed for Oral Interviews, but scores in the written proposals will not be considered in the Oral Interview evaluation.

If Oral Interviews are held, the short list of at least two finalists will be invited to attend oral interviews in _____ (*location*). Finalists will be notified and informed of specific interview requirements and procedures at least 7 days prior to the oral interview. Consultant personnel for each oral interview will be limited to no more than the following three persons:

1. Proposed Consultant Team Leader (Project Manager)
2. Project Architect
3. any other key member of the consultant team

Oral interviews, if conducted, will be separately scored and ranked, and will determine the final outcome of the consultant selection process.

5.0 SELECTION AND AWARD PROCESS

5.1 Selection Based on Written Proposals

Each member of the Selection Committee shall independently score all written proposals that are received by the established proposal deadline. Each member's scores, as they relate to the group of proposals, are then ranked. The proposal receiving the highest

score is given a ranking value of "one", the second highest scored proposal receives a ranking of "two", and so on. The independent scores and rankings of each member are then forwarded to the Procurement Officer. These rankings are then checked for accuracy and combined to form a composite ranking. If all members have selected the same firm as the number one ranked firm, the Selection Committee may declare the process complete, or they may proceed to the Oral Interview stage.

The members shall then meet and discuss differences in individual scores and may, as a group, contact references and share information beyond that which appears in the written proposal. As a result, individual members may change their scores and rankings, but must cite their reasons for doing so. At the conclusion of the meeting the Procurement Officer shall re-compute a new combined ranking based upon changes, if any, to the individual rankings.

5.2 Selection Based on Oral Interviews

Following review of the written proposals, the Selection Committee will then discuss their option of proceeding to Oral Interviews. Oral Interviews are at the discretion of the Selection Committee and may be pursued for any reason, but are typically intended to:

- provide more detailed information about the written proposal, especially when the scores/rankings between proposals are close;
- allow the Selection Committee to get to know the expertise and nature of the Proposer's work better;
- provide both the Selection Committee and the Proposer the opportunity to communicate ideas verbally, rather than strictly in written form.

5.3 Proposal Acceptance

Once the selection process (written proposal review and oral interviews, if held) is complete, the Proposer with the lowest numerical rank, based upon the evaluation criteria, will be declared the apparent successful Proposer. In the event of a tie in the ranking totals, the raw scores of the Proposers who are tied will be totaled to determine the successful Proposer. The successful Proposer will be invited to enter into contract negotiations with the CBJ. If negotiations are unsuccessful, discussions with the lowest ranked Proposer will be terminated and the second lowest ranked Proposer may be contacted for negotiations.

Selection of the successful Proposer is anticipated to be announced within __ calendar days of the submission date.

Award of contract, if made, will be to the responsible Proposer selected in accordance with the criteria described in this RFP, and whose final proposal and fee is accepted by the Owner. The Owner reserves the right to award the contract to the successful firm without further discussion.

6.0 INSURANCE REQUIREMENTS

Describe the insurance requirements for the project.

7.0 PROTESTS

Briefly describe the protest process, if applicable

CONSULTING FIRM: _____

SCORED BY: _____

DATE: _____

WRITTEN EVALUATION/RANKING

	Points Possible	Score
1. Scope of Services		
The Consultant demonstrates thorough understanding of the requested services and has identified tasks and approaches necessary to address the issues discussed in this RFP.	0 - 20	_____
2. History and Experience		
a. Firm's experience demonstrates past project success through close coordination with all parties and the ability to work cooperatively with challenging budgets while providing high quality services.	0 - 20	_____
b. Consultant Team demonstrates similar project experience within the last five years.	0 - 10	_____
c. Firm demonstrates expertise in the design of public facility infrastructure projects, especially airfield maintenance facilities.	0 - 10	_____
d. Firm demonstrates expertise in sustainable design.	0 - 15	_____
3. Organization and Personnel Qualifications		
a. Consultant Team is well organized with appropriate levels and types of personnel to accomplish an efficient and effective project.	0 - 20	_____
b. Personnel demonstrate expertise in the relevant planning, design, and construction administration issues for this project.	0 - 30	_____
c. Personnel demonstrate expertise in collaborative problem solving, peer review, and quality control.	0 - 10	_____
d. Consultant Team shows experience in working with one another to form an effective team to provide the needed services efficiently and effectively.	0 - 10	_____
4. Project Execution		
a. Proposed project methodology is logical and effective, and is also solidly grounded in realistic design issues that are relevant to the planned facility. The proposed approach is responsive to the requested services and seems do-able within the proposed project schedule.	0 - 25	_____
b. The Consultant's approach to claims is reasonable and fair to all parties.	0 - 10	_____
5. Proposal is well organized, clear, and responsive.	0 - 20	_____
	Total Points	200 _____
	Individual Ranking	_____

CONSULTING FIRM: _____

SCORED BY: _____ DATE: _____

ORAL INTERVIEW EVALUATION/RANKING

	Points Possible	Score
1. Scope of Services		
a. Understanding of the Project Scope	0 - 20	_____
b. Methodology	0 - 40	_____
2. Consultant's Performance		
a. History and Experience	0 - 40	_____
b. Qualifications and Appropriateness of Personnel	0 - 60	_____
c. Presentation	0 - 40	_____
	Subtotal	_____
	Total Points	200 _____
	Individual Ranking	_____