

Consultant/Contractor Selection Guidelines:

The following RFQ process is recommended by the Division of Public School Capital Construction Assistance for the following consultant/contractor positions: Master Planner, Owner's Representative, Architect, Design/Build, and CM/GC:

- Selection/evaluation team. Recommended evaluation team to be 3 to 5 people as follows:
 - One district, charter school, BOCES, or CSDB admin or board member;
 - One outside, uninvolved, individual who has extensive experience in the design/construction/facility management industry;
 - One who might be owner's rep, if available, possible BEST staff, or another individual who has experience in school design/construction/facility management industry and with the school district;
 - Up to two others, but no more than one more administration or board member.
- A BEST Technical Assistance representative will partner with the district for the entire RFQ process if desired. Since the State invests a substantial amount of funding into a project, BEST staff desires to partner throughout this process and throughout the entire life of the project. BEST staff will attend the interviews if requested to ensure that the process is fair and transparent.
- If potential consultants are to be interviewed, then the personnel that will work on the project should be the individuals interviewed. The marketing team, owners, principals etc., should not be allowed to participate in the interview unless they will be physically working on the project and clearly state the extent that they will be directly involved with the project.
- Selection criteria should be clearly noted in the RFQ. It is suggested that scores be identified for each criteria that will be used, that each criteria be scored, and the candidate with the highest score selected.

A shortlist based on the RFQ response scores may be established and the shortlisted candidates may be interviewed. The selection committee determines the questions to be asked at the interviews in advance with a score for each question, which then can be added to the initial RFQ score resulting in a total combined score. Alternatively, the top shortlisted candidates determined through RFQ may be considered separately and scored on interview only.

- It is suggested that fee proposals not be submitted at the time of the proposal or at the time of the interview. The process should be qualification based. Fees should be negotiated with the top-scoring applicant, the apparent winner. If the

negotiation is unsuccessful with the apparent winner, then the fee may be negotiated with the next highest scoring applicant.

If, however, fee is to be included with the proposal or interview by district policy, it should be kept in a sealed envelope, and opened only upon selection of the winning applicant. Once the process has been completed, the remaining sealed envelopes should be destroyed unopened.

- Fee proposals should provide a very detailed scope/description of the project. They may include but not be limited to:
 - Lump sum fee;
 - Statement of work;
 - Confirmation that all scope items from the original RFQ will be addressed;
 - Any exclusions;
 - # of hours;
 - # of people;
 - Other resources;
 - How the resources are to be used;
 - Breakout of anticipated reimbursables included in the fee proposal;
 - Hourly rates for all personnel involved in the project;
 - Number of site visits anticipated to complete the work.

- RFQ responses that have more or less than what is requested may be automatically eliminated.