
**CARROLL COUNTY PUBLIC SCHOOLS
ADMINISTRATIVE REGULATIONS**

BOARD POLICY DJA: PROFESSIONAL/TECHNICAL SERVICE CONTRACTS

Administrative Procedures For Appointment of Architectural, Engineering and Construction Management Firms For Capital Improvement Projects

I. Introduction

Major school construction projects may require professional architectural, engineering and/or construction management services. The design team made up of architects and engineers provide complete design services from schematic design through occupancy and subsequent warranty period. The construction management firm provides services from design through commissioning including scheduling, estimating, value engineering, contractor management and coordination, A/E coordination, budget management and quality control.

II. Purpose

To set forth guidelines to be used in the process of advertising for, screening of, selection of and negotiation with architectural, engineering and construction management firms for major school construction projects.

III. Guidelines

The following procedures shall apply when selecting firms to perform design or construction management services for capital work exceeding *(\$500,000.00)*.

IV. Selection Procedures

A. Establish Selection Schedule

Development of a selection schedule establishes a time frame for completion of the process and provides each participant with the appropriate information to plan for each phase of the process.

B. Develop Scope of Work

The Scope of Work briefly describes the particular needs of the project and CCPS. The Scope of Work shall contain information such as:

1. Owner's name
2. Project name
3. Project location
4. Single point of contact from the Purchasing Department for the selection process
5. Description of CCPS' need for the project
6. Description of selection process, individuals involved and selection schedule
7. Description of other construction in process or planned for the same site but not part of the Scope of Work
8. Description of all required services
9. Anticipated involvement in each phase of the project, e.g., Building & System Analysis, Ed. Spec. development, Schematic Documents, Design Documents, Construction Documents, Construction, Project Closeout and Warranty Period
10. Project outline, including size, function and occupancy, and other general anticipated requirements, e.g., renovation; demolition; additions; new construction; and energy, land use and site selection considerations
11. Anticipated schedule, including completion of design, start of construction and project completion date
12. Additional or unique requirements/considerations such as anticipated funding delays, budget concerns, project size or construction, etc.

C. Identify Requirements for Proposal

In an effort to maintain consistency and fairness in the evaluation process, a list of specific requirements shall be identified for inclusion with each firm's qualifications. Requirements may include:

1. Name, address and brief history of firm
2. Resumes of personnel to be assigned to the project
3. Related projects/areas of expertise on which the firm has performed work or had experience during the last five years
4. Examples of scheduling, budgeting, value engineering studies, feasibility studies or other specific tasks necessary for this project
5. Financial statement
6. Statement of understanding of Scope of Work
7. Completed U.S. Government Standard Forms 254 and 255

D. Announcement of Request for Proposal

Upon approval of the succeeding year's Capital Improvement Program (CIP) for Carroll County Public Schools by the Board of Public Works and/or Carroll County Government, the Purchasing Department with the assistance of the Office of School Construction may begin public dissemination of appropriate information about each capital project in order for professional firms to be aware of its availability. This shall be accomplished in the following manner:

1. A notice for each project shall be advertised in at least two (2) daily newspapers. The advertisement shall provide the project Scope of Work and date and time for submission of qualifications.
2. A notice for each project shall be transmitted to the F.W. Dodge Division, McGraw Hill Information Systems Company for distribution. All notices shall contain the same information as described in IV.B.
3. For projects that may be eligible for State reimbursement, bid solicitation language will specify Minority Business Enterprise requirements, and a notice shall be transmitted to the Baltimore Council for Economic and Business Opportunity, Inc. All notices shall contain the same information as described in IV.B.

E. Evaluation of Proposal

The Evaluation Committee shall be made up of three (3) to five (5) members, assembled with the intention of including those individuals and groups that are identified as stakeholders. The stakeholders include personnel in the Office of School Construction, Purchasing Department, the Facility Planner, the selected Board member on the construction planning committee for the project, along with one other member of that committee. After the members of the committee are selected, a chairperson shall be designated.

The evaluation process will include the following procedures:

1. The proposals from those interested firms will be assembled and distributed to each member of the Evaluation and Interview Committee by the point of contact referenced in the Scope of Work.
2. Each member of the Evaluation and Interview Committee shall evaluate the proposals from each firm.
3. The committee shall meet after all evaluations have been completed and as necessary to remain within the established Selection Schedule. The results of each member's evaluation shall be compiled, and the short list of firms developed.
4. A letter shall be forwarded to those short listed firms and those firms not making the short list. Along with the letter, short listed firms will be provided with the Interview Process. A schedule for site tours if necessary and any additional information either deemed necessary by the committee or requested by the selected firms.

F. Interviews

In addition to the members of the Evaluation Committee, the Interview Committee shall also have one member assigned from the Planning Committee.

The interview format will consist of two (2) parts. The first shall be a presentation by representatives of the firm along with representative of any sub-consultants that may be utilized. The presentation should focus on the issues listed in the Interview Process. The second part will consist of questions developed by the committee. Each firm must be asked the same questions. Follow up questions are permitted if additional information or clarification is required.

The committee chairperson will assign committee members to perform reference checks for each short listed firm.

Questions may follow the following parameters. Additional parameters may be added if deemed appropriate by the committee:

1. Past performance on similar work in terms of quality
2. Safety
3. Past performance working with State and local agencies in planning, designing and constructing projects
4. Experience and abilities in scheduling and budget management
5. Current work load of firm and ability to accomplish proposed project
6. Special qualifications, experience, design approach, etc.
7. Originality and design quality on previous projects
8. Experience in the construction delivery method proposed for the project

Interviews shall be arranged to remain within the established Selection Schedule.

Any additional information either requested by the short listed firms or as deemed necessary by the committee shall be forwarded to all short listed firms prior to the interview.

G. **Ranking and Selection**

Utilizing the Interview Process, the committee members shall each assess the scores for each firm interviewed. Subsequent to the final interview, the chairperson shall tally the scores for each firm from each committee member.

In accordance with the RFP process, the firms achieving the highest technical score shall be considered the best qualified for the project. Price proposals (submitted under separate cover) from the qualified firms only will be opened and scored by an inverse proportion, and added to their technical score. The Board of Education reserves the right to request "Best and Final" offers from the qualified firms. Price negotiations, if needed, will commence with the highest scoring firm. If price negotiations are terminated with this firm, the committee will enter into negotiations with the next highest scoring firm.

V. Recommendation and Approval

Upon successful completion of the negotiations, the committee chairperson shall prepare a summary of the selection process and a recommendation of the selected firm for approval by the Superintendent via an Action Item for Board of Education approval.

The Board of Education shall act upon the Superintendent's recommendation. If the proposed appointment is rejected, the matter will be returned to the committee for further consideration.

TYPICAL RFP PROCESS

1. Define scope of services and anticipated budget:

- What services are required
- What is the time frame for these services to be performed
- What special qualifications are needed to perform these services
These items will become part of the RFP

- What is the budget for these services
- Where is the funding source, and are these funds secure
- If the RFP comes in over budget, which services would you be able to forfeit

2. Prepare the RFP:

- The RFP is prepared by the Purchasing Department with assistance from the end user
- The provisions, terms and conditions, and any addenda to the RFP become part of the contract

Note: There may be instances when it is prohibited to solicit proposals for an existing service. In these situations, exceptions to the RFP process will be allowed with approval from the Superintendent's designee(s). It is the responsibility of the end user to corroborate why such services should be exempt from the RFP process.

3. Solicit RFP

- RFP is sent to qualified firms, and is advertised in at least one (1) local newspaper(s)
- Once the RFP has been distributed, the Purchasing Department becomes the sole contact. Any information shared with one vendor MUST be conveyed to all vendors via an addendum. All addendums will be issued by the Purchasing Department in writing, and will become part of the RFP contract terms and conditions.

4. Receive, review, analyze and evaluate RFPs:

- All RFP's must be returned to the Purchasing Department by the specified date and time. LATE PROPOSALS WILL NOT BE ACCEPTED.

- The end user and the Purchasing Department will evaluate and score proposals to ensure that all specifications and qualifications have been met. Selection of the most qualified vendor will be done by evaluating and scoring technical proposals. Price proposals, which may be submitted under separate cover or with the technical proposal, will be scored by an inverse proportion and added to the technical score. Interviews may be conducted with those firms meeting technical requirements, prior to evaluating price proposals.

5. Contract Negotiations

- Purchasing Department can negotiate price with the most qualified vendor if necessary.