



Ranking and Selection of Consultants for Local Control



League of Oregon Cities
Annual Conference
Portland, Oregon
November 9th 2002

The Owners Decision Making Process

- Making a commitment to using an “Outside Consultant” for the project.
- Deciding between Design/Bid/Build or an “Alternative” Project Delivery System
- Deciding on the Consultant Selection Process based on Project Complexity and Owner Preferences.
 - RFQ/FRP/Interview (optional)
 - RFP/Interview (optional)

The Owners Decision Making Process Introduction

- Preparation of a Statement of Qualifications and Performance data.
 - Lead person and contact information
 - Project description and Preliminary “scope of work”.
 - Proposal deadline and selection process timeline.
 - Description of selection rating and ranking criteria, selection panel members and selection process to be used.
 - Review “Draft” statement with regulatory and funding agencies prior to release.
 - Define the subject matter

The Owners Notification to Consultants

- Selection of a short list from a “statement of qualifications” pre-screened list
 - Directly hiring a consultant you have confidence in.
 - The next phase of an ongoing project.
- Public Advertisement Procedures
 - Newspaper of record
 - Direct notification to consultants who have shown prior interest in the project
 - Trade journal advertisement if routinely done or required by funding agency.

Receipt and Evaluation of Proposals

- “Postmark” deadline or proposal received by deadline
- Sufficient originals for all reviewers
- Reference checks are most important (more on this next)
- Establish a “weighted” scoring sheet/list
- Score the proposals received
- Finalize the ranking of proposals or proceed to the interview

The Importance of Reference Checks

- Describe the project they worked on for you. Was their “Level of Service” consistent with their “Cost of Service?”
- Would you hire them again?
- Did the project manager “stay the course?”
- Did they hold the contractor to the contract?”
- What was the frequency and rationale for change orders?
- Did they furnish “as constructed” drawings, buried fitting photo documentation, O&M manuals, etc?

The Importance of Reference Checks

- Were their “preliminary estimates” accurate throughout the project?
- Did they set realistic work milestones and meet them?
- Did they provide and special services such as funding assistance, extra public relations work, excessive agency paperwork, etc.
- Did they complete the 11th month warranty inspection and or periodic calls or visits back to the project?

Issues about Proposed Project Staffing

- Who is going to be the start to finish manager and the 2nd level production person? What are their credentials?
- What will be their time commitment at each stage of the project?
- What specific projects of a similar nature to our project have they done and have they worked together on a similar sized project?
- With whom can I best check their individual references?
- How long have they worked for your firm?

Issues about Proposed Project Staffing

- What are the credentials and past experience of the on-site inspector you propose for the project?
- Does your firm have an “independent” QA/QC person or program?
- What sub-consultants will you use and what percentage of the work at each stage of the project will they do?
- Have you worked with these subs on similar projects? If so where and when?

Interview and Ranking Process

- Narrow to 3 firms maximum
- Give 2 + weeks notification with time, place, and specific time for length of interview/presentation.
- Allow at least 1 hour for interview with half hour for set up.
- Let consultant know before if a list of formal questions will be asked.
- Allow at least 20-30 minutes for Q&A.

Interview and Ranking Process

- Allowed to ask for pre-interview submittals
Insurance; EEO, etc.
- Interview team of 3-7; avoid conflicts of interest
- Owner's "head project person" should lead the interview team
- Hold a pre-interview preparation meeting with the interview team

Interview and Ranking Process

- Hold a pre-interview preparation meeting with the interview team
 - Review top ranked proposals
 - Discuss reference checks
 - Go over the scoring procedure
 - Allocation of interview time

Interview and Ranking Process

- Be on time!
- Introduce panel. Be fair and impartial to all consultants
- Follow your predetermined schedule, score each one as they proceed.
- Rate and rank the consultants immediately after all interviews.
- Notify the highest ranking consultant as soon as you have authority to do so.

Insight into Interviews

- Don't choose the last consultant just because they were last. They had that “advantage”.
- Watch for “compatibility? Between your head project person and their project manager.
- This should be a forward thinking session. Innovation and new ideas should be explored.

Insight into Interviews

- This is not a place for “claims” history or “cost history”. The reference checks should have weeded these out.
- A frank discussion about a “true” schedule and potential project stumbling blocks make good Q&A.

Questions

- If I don't have time to answer your question, leave a business card with the question on the back and I will call you with an answer.
- Sample RFQ forms and "Questions and Score Sheets" for the Interview are in the back.
- A tri-Fold "How to" Brochure on the QBS Process furnished by ACEC-Oregon is in the back also.
- Be sure and fill out the evaluation forms on this session before you leave. Thank You.