



# RFP and the Selection Process

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# The QBS Roadmap

- Clarify scope
- Establish a schedule
- Identify stakeholders
- Prepare and issue the Request for Proposals (RFP)
- Evaluate proposals
- Conduct interviews
- Negotiate with selected firm
- Enter into an agreement

**“Begin with the end in mind”**  
– Stephen R. Covey



# Preparing and Issuing the RFP

- Clear scope
- Critical factors for project success
- Develop relevant selection criteria early
- Communicate selection criteria
- Include the submittal deadline and the timeline





# Preparing and Issuing the RFP

- Clearly state the information to be provided
- Constrain the proposal format
- Require references / letters of recommendation
- Include the draft form of agreement
- Require fee proposals in a separate sealed envelope



# Evaluating Proposals

- Evaluate based upon selection criteria
- Team experience
- Individual qualifications and experience
- Reference checks
- Document on a common rating sheet

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	<b>Project 1</b>	<b>Project 2</b>
Team Member 1	X	X
Team Member 2		X
Team Member 3	X	

# Evaluating Proposals

- Evaluator meeting
- Rank firms
- Invite top ranked firms to interviews

Selection Panel Rating Form  
Actions Taken on Firms Considered for Selection

Project: \_\_\_\_\_

Board Member: \_\_\_\_\_

Firm Name & Location	Evaluation Criteria	Rating	Weighting Factor	Final Rating (Rating * Factor)
	<p><b>1. Understanding of the City's Goals and Unique Nature:</b> Based on the information provided by the City and past experience in Monterey, does the proposer understand the unique nature of many of Monterey's neighborhoods and districts?</p> <p><b>2. Staff:</b> Do the qualifications of key personnel to be assigned to work on City projects understand the unique character of Monterey? Do assigned personnel have requisite education, experience, and professional qualifications?</p> <p><b>3. Familiarity with Locality:</b> Does the firm have familiarity with the City and the area required for successfully completing projects? How close are the firm's permanent offices to the Monterey Peninsula? (Preference is to local or near-local firms).</p> <p><b>4. Specific Management Approach:</b> How does the proposer intend to achieve the City's budget and time goals for projects? How will the firm apply its management techniques and resources? Has the firm provided sufficient assurance that projects will be started and completed in a timely manner?</p> <p><b>5. Experience:</b> Has the proposer demonstrated the ability to successfully provide services for projects of a similar complexity and nature as described herein?</p> <p><b>6. Organization:</b> Are the qualifications of the firm's personnel suitable for the anticipated projects; and, does the firm's organizational structure show sufficient depth for its present workload? Is the level of staffing sufficient to produce quality work in a timely manner?</p> <p><b>7. Reputation:</b> Are the firm's references from past clients and associates favorable; and, does the firm show financial and operational stability?</p> <p><b>8. Services Offered:</b> Does the firm offer the breadth and quality of services required for the project?</p>			

Other Comments: \_\_\_\_\_

# Conducting the Interview

- Panel of technical experience and other stake holders
- Questions prepared in advance
- Brief the rating panel
- Allow for presentations
- Rank firms
- Document on a common rating sheet



# Negotiate with the Selected Firm

- Prepare a work breakdown structure
- Open the fee proposal for the top ranked firm
- Identify tasks with a disproportionate level of effort
- Negotiate to achieve mutual scope understanding
- Move to the next ranked firm if unsuccessful

WORK BREAKDOWN STRUCTURE TEMPLATE

No	Type of task	Description of task	Outputs deliverables	Work Package
<b>1</b>	<b>Main Task</b>			
1.1	Sub-task			
1.2	Sub-task			
1.3	Sub-task			
1.4	Sub-task			
1.5	Sub-task			
1.6	Sub-task			
<b>2</b>	<b>Main Task</b>			
2.1	Sub-task			
2.2	Sub-task			
2.3	Sub-task			
2.4	Sub-task			
2.5	Sub-task			
<b>3</b>	<b>Main Task</b>			
3.1	Sub-task			
3.2	Sub-task			
3.3	Sub-task			
3.4	Sub-task			
3.5	Sub-task			
3.6	Sub-task			



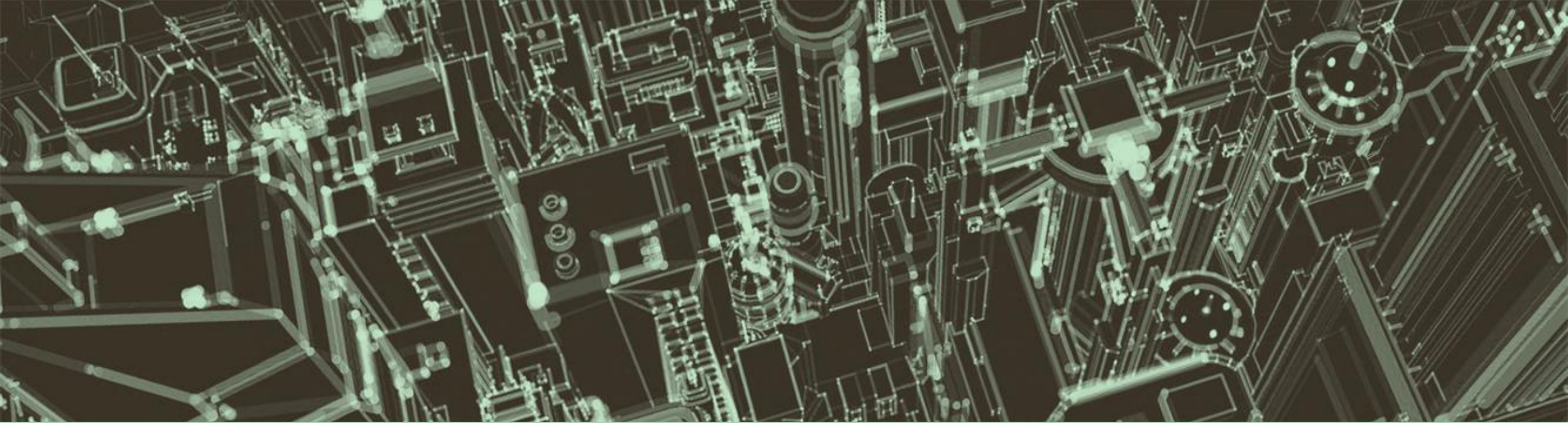
# Entering into a Consultant / Agency Agreement

## Language for Consultant Contracts

- Issue a Request for Proposals
- Receive proposals
- Select most qualified
- **Authorize** execution of an agreement for professional services

## Language for Construction Contracts

- Call for Bids
- Open bids
- Determine lowest responsive bid
- **Award** a contract for construction



Questions?

