

# **Template A**

## **Preliminary Scope of Service**

Name of Project:

Project Owner:

Project Location:

Contact Person:

Address:

Phone:

Email:

Project Description:

Project Goals and Constraints:

Estimated Construction Budget:

Source of Financing:

Project Schedule

Planned Date of Study/Design Startup:

Planned Date of Construction Letting:

Planned Date of Construction Startup:

Planned Date of Completion:

Other Key Dates (i.e., permits, right-of-way regulatory approval)

Site Requirements or Restriction:

Standards or Technology Requirements:

Professional Services Required:

Additional attachments to be included if applicable:

Feasibility studies

Land Surveys

## **Template B**

### **Invitation to Submit a Statement of Professional Qualifications**

To: (List of firms alphabetically)

From: (Project Owner and Owner's Representative and Title)

Subject: Invitation to Submit Statement of Professional Qualifications

Project: (Name of Description of Project)

Your firm is invited to submit its statement of professional qualifications to become eligible for selection to enter into negotiations for professional services agreement for our project. Attached is a list of information that should be included in your Statement of Qualifications, along with a preliminary scope of work for the project.

It is our intention to review the Statement of Qualifications and select firms for further consideration.

Your Statement of Qualifications should be delivered to the following address no later than (time and date). Statements received after this deadline will not be considered.

Statements of Qualifications should be transmitted to:

Name:

Title:

Address:

Email:

#### **List of Information to Be Included in the Statement of Qualifications**

**Your Statement of Qualifications should include the following information:**

1. Firm name, address, and brief history.
2. Services to be provided by your firm.
3. Services to be provided by outside consultants
4. Project understanding and Project Approach – State your firm's understanding of the project and how the firm plans to approach delivering the project.
5. Related experience to include:
  - a. Projects of a relevant nature with date of completion.
  - b. Projects of a relevant scope with date of completion.
  - c. Examples of project budget and cost estimating procedures with results.

## **Template B *continued***

6. You may include a maximum of one page of additional information not included above if you feel it may be useful and applicable to this selection process.

***Note to owner: You may wish to limit the total number of pages for the statement of qualification and specify a font size. It is helpful to outline how you want the statement of qualifications organized by subject, then align your scoring criteria to the outline of information.***

**Note: Any questions regarding the qualification process and project must be submitted by (insert date and time here) ONLY to:**

Name:

Title:

Address:

Phone:

Email:

### **Optional instructions:**

1. Include project name, owner's representative, and phone number, and construction dollar amount for each project example. Include at least one, but no more than five, photos of each project with project identification and firm identification on each photo.
2. Qualifications or key personnel to be assigned to this project. (Note: Key personnel may be requested to attend an interview).
3. The owner may choose to offer a pre-proposal meeting and tour and may opt for a question-and-answer period with a deadline of questions and answers five working days prior to the submittal deadline (Note: Five days is a recommended timeline). Responses to all questions should be published in the same method as the request for qualifications was released. Responses should not identify the names of the firms asking the questions.
4. Conducting an interview is optional to further evaluate the top three to five firms. See template F for more information.
5. It is recommended the owner include a point breakdown per category and that these categories and points be part of the score.

# Template C

## Evaluation Form for Statements of Qualifications

Name of Project

Name of Design Firm

Name of Evaluator

*(The owner should align their scoring criteria with the Request for Statement of Qualifications. The categories below are for example only.)*

<u>CRITERIA</u>	<u>RATING*</u>	<u>WEIGHT</u>	<u>SCORE</u>
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I.	<u>Firm &amp; Individual Qualifications</u>			
	• Services to be provided	X	X	X
	• Qualifications & experience of Principals & key personnel	X	X	X
II.	<u>EXPERIENCE CONSIDERATIONS</u>			
	• Specific project type experience	X	X	X
	• Similar to project type (complexity, size, etc.)	X	X	X
III.	<u>Ability to Perform Work</u>			
	• Availability of staff	X	X	X
	• Projects in progress	X	X	X
	• Other considerations	X	X	X
	• Services to be provided by outside consultants	X	X	X
IV.	<u>References</u>			
	• Quality of design	X	X	X
	• Ability to meet schedules/deadlines	X	X	X
	• Ability to control costs/meet budgets	X	X	X
	• Communication/cooperation	X	X	X

**TOTAL SCORE**

**\*Rating Key**

**1=Poor**

**2=Fair**

**3=Good**

**4=Excellent**

**5=Superior**

# Template D

## Design Firm Reference Check

Name of Design Firm \_\_\_\_\_

Project Referenced \_\_\_\_\_

Owner \_\_\_\_\_ Person Contacted \_\_\_\_\_

Location \_\_\_\_\_ Contact Information \_\_\_\_\_

1. When was the project completed?
2. What services did the firm provide (design, observation, etc.)?
3. Name of firm's representatives you worked with most closely.

- |  | <u>Poor</u> | <u>Fair</u> | <u>Good</u> | <u>Excellent</u> | <u>Superior</u> |
|--|-------------|-------------|-------------|------------------|-----------------|
|  | 1 pt        | 2 pt        | 3pt         | 4 pt             | 5 pt            |
- 

Enter the rating from questions 4-7 directly on Statement of Qualifications Evaluation Form, Part IV, "References" on Template C.

## Template E

### Memo to Firms Not Selected for Further Consideration

**TO:** (List in alphabetical order all firms NOT selected for further consideration)

**FROM:** (Project owner's representative)

**SUBJECT:** (Project name)

We would like to thank you for submitting your Statement of Qualifications and expressing interest in our project.

After careful consideration of all interested firms, the (name of individual or group responsible) has selected the following firms for further consideration for this project:

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

While your firm was not selected for further consideration, we appreciate your interest in our project and submitting your Statement of Qualifications.

# Template F

## Memo to Firms Selected for Interview

To: (Name of firm selected for further consideration)  
From: (Project owner's representative)  
Subject: (Project name)

Your firm has been short-listed and will be interviewed for professional design services.

The other firms selected for further consideration are:

- 1 \_\_\_\_\_
- 2 \_\_\_\_\_

Before making the final selection, we would like to interview representatives of each short-listed firm. Each firm will be allowed (number) minutes to make its presentation and answer questions. The interview for your firm is scheduled for (time, date, and location).

During the interview, your firm's representative should plan to discuss its interpretation of the project requirements; various technical alternatives that might be considered; the key personnel who would be assigned to the project; the firm's experience with similar projects; outside consultants who would be part of the design team; project management and cost control techniques; and methods of determining compensation of required services.

Your interview team should consist of key members of the team for the project. Your team should consist of no more than (number) members.

### **OPTIONAL INSTRUCTIONS**

A list of the evaluation criteria to be utilized by the interview team is attached for your consideration.

We will offer each firm an opportunity to tour the [project site before being interviewed. To arrange for a tour, please contact (provide name and contact information).

OR

A preinterview meeting and tour of the site has been scheduled for (date and time). All parties meet at (location).

# Template G

## Evaluation Form for Short-Listed Firms

Name of Project

Name of Design Firm

Name of Evaluator

Possible Points   Points Awarded

**1. Grasp of project requirements**  
**Firm's analysis, interview preparation & level of interest**

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**2. Design Approach/Methodology**  
**Technical alternatives, creativity, problem solving ability**

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**3. Project Management**  
**Proposed project schedule and cost controls**

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**4. Project Design Team**  
**Subconsultants who would be made part of the project design team**

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**5. Key Project Personnel**  
**Qualifications & experience of project manager & other key personnel**

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**6. Responsiveness**  
**Compatibility between design professional and owner, general attitude ability to communicate**

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**7. Geographic Considerations**  
**Familiarity with locale and local government & regulatory agencies.**

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**TOTAL** \_\_\_\_\_

# Template H

## Final Evaluation Tally Sheet

	<b>Firm A</b>	<b>Firm B</b>	<b>Firm C</b>
Interviewer 1 _____	_____	_____	_____
Interviewer 2 _____	_____	_____	_____
Interviewer 3 _____	_____	_____	_____
Interviewer 4 _____	_____	_____	_____
Interviewer 5 _____	_____	_____	_____
<b>TOTAL SCORE</b>	_____	_____	_____
<b>AVERAGE SCORE</b>	_____	_____	_____

# Template I

## Memo to Short-listed Firms Announcing Final Selection

To: (List alphabetically all interviewed firms)

From: (Projects owner's representative)

Subject: (Project Name)

Following interview with each of the firms that were short-listed for this project, the interviewers ranked the firms in the following order:

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

Throughout this process it has been our objective to select the firm most qualified to provide the services we require. Accordingly, we have entered into negotiations with (name of number one ranked firm).

Please accept our most sincere thanks for the time and effort you have expended on our behalf. Perhaps we will have the opportunity to work together on another project in the future.