

## Appendix 1 Sample Advertisement for A/E Services

Solicitation No. *(Insert Solicitation Number)*  
Qualifications Due  
On *(Insert Date and Time)*

### Advertisement

#### Request for Qualification (RFQ) To Provide A/E Services Project No. *(Insert Project Number)*

The *(Insert Organization Name)*, as “Owner”, is seeking Statements of Qualifications from firms interested in providing *(Insert Type of Service)* Services. The Request for Qualifications (RFQ) is issued to identify the most qualified potential providers of the above-mentioned services. One or more firms which respond to the RFQ and who are determined by the Owner to be especially qualified may be deemed eligible and may be invited to discuss and negotiate for these. All respondents to the RFQ are subject to instructions communicated in this document and additional terms and conditions listed in the Owner’s RFQ. The Owner reserves the right to reject any or all statements of qualifications, and to waive technicalities and informalities at the discretion of the Owner.

**Restriction of Communication:** From the issue date of this RFQ solicitation until a successful proposer is selected and announced, proposers are not allowed to communicate for any reason with any members of the Selection Committee or the Owner staff, except for:

- a) Submission of questions as instructed in the RFQ,
- b) During the proposer's conference (if applicable), or
- c) As provided by any existing work agreement(s).

For violation of this provision, the Owner reserves the right to reject the proposal of the offending proposer.

The RFQ Package may be obtained at *(Insert Link or Address)*. Statements of Qualifications must be delivered to the *(Insert Submission Requirements)* and should be delivered in accordance with instructions in the RFQ package.

Questions may be directed to *(Insert Contact Information)*. Questions will be answered via addendum only. The deadline for submitting questions is *(Insert Deadline)*. The Owner reserves the right to reject any and all statements of qualifications, as well as to waive technicalities and informalities.

It is the policy of the *(Insert Applicable Loan Program)* that small businesses, female-owned businesses and minority businesses have a fair and equal opportunity to participate in these opportunities. Contractors and subcontractors who utilize qualified minority subcontractors may qualify for a state income tax credits for qualified payments made to minority subcontractors. See Official Code of Georgia Annotated (O.C.G.A.) Section 48-7-38.

*(Insert Owner Address and Contact Info)*

**Appendix 2**  
**Sample Request for Qualifications**

***Insert Organization Name (“Owner”)***

**Request for Qualifications**

**To Provide**

***(Insert Type of Service) Services***

**For**

**Project No. *(Insert Number)***  
***(Insert Project Name, Location)***

# Request for Qualifications

## A/E Services

### Project No. *(Insert Number)*, *(Insert Project Name, Location)*

The *(Insert Organization Name)*, (“Owner”), is soliciting statements of qualifications from professional firms interested in providing A/E Services for Project No. *(Insert Number)*, *(Insert Project Name, Location)*, (“Project”). This Request for Qualifications (“RFQ”) seeks to identify potential providers of the above-mentioned services. One or more firms that respond to this RFQ and who are determined by the Owner to be especially qualified, may be deemed eligible and may be invited to discuss and negotiate for these services. All respondents to this RFQ are subject to instructions communicated in this document and are cautioned to completely review the entire RFQ and follow instructions carefully. The Owner reserves the right to reject any or all statements of qualifications or proposals, and to waive technicalities and informalities at the discretion of the Owner. Please note: The issuance of this RFQ invokes a Restriction of Communication on potential respondents, which, if violated, may result in proposal rejection (See Section 8 for details).

## 1. General Project Information

### Project Description

*(Insert Project Description)*... The delivery method for this Project will be *(Insert Delivery Method)*, and, as a minimum, will employ the services of *(Other Team Members, As Applicable)* in addition to the A/E Consultant.

### Project Goals

It is envisioned that the successful Project will achieve the following objectives:

- *(Insert Identified Objectives)*

### Project Schedule

*(Insert Project Work Schedule Expectations)*

(All of the dates above are estimates and subject to change. The fee structure for A/E Consulting Services relative to the schedule and fee amounts will be agreed upon by the Owner and the Consultant prior to the start of Consulting Services.)

## 2. A/E Consultant Requirements

*(Insert Requirements)*

The final scope of services will be developed by the Owner and communicated to eligible firm(s) prior to actual agreement. The Owner will provide additional details and a list of general duties required in A/E Consulting Services for this Project to eligible finalists.

### 3. RFQ Schedule Of Events

The following Schedule of Events represents the Owner's best estimate of the schedule that will be followed. All times indicated are prevailing times in Georgia. The Owner reserves the right to adjust the schedule as the Owner deems necessary.

a. Owner issues public advertisement of <b>RFQ</b> for a period of 30 days	XXX	-----
b. Deadline for written questions/requests for clarification ( <i>see section 6</i> )	XXX	4:00 PM
c. Deadline for submission of Statements of Qualifications ( <i>see sections 5, 7</i> )	XXX	2:00 PM
d. Owner completes evaluation, posts results, and issues Notification to Finalist firms	XXX	-----
e. Owner conducts mandatory pre-proposal conference and site visit (if applicable) for finalist firms	XXX	TBA
f. Deadline for submission of written questions from finalists	XXX	4:00 PM
g. Deadline for finalist firms to submit Project Proposal (if applicable)	XXX	2:00 PM
h. Selection Committee interviews finalist firms	XXX	TBA

### 4. Selection Process

A Selection Committee, consisting of representatives of the Owner, will identify a selection of finalist firms through a qualifications-based selection process. The Selection Committee will receive and evaluate Statements of Qualifications submitted in response to this RFQ using the following criteria:

#### Criteria for evaluation of Statements of Qualifications

*XX% Factor*} Stability of the firm, including the firm's corporate history, growth, resources, form of ownership, litigation history, financial information, and other evidence of stability.

*XX% Factor*} Firm's relevant project experience and qualifications, including the demonstrated ability of firm in effective Consulting Services of facilities comparable in complexity, size, and function. This includes relevant experience and qualifications of the principal Consulting Services lead staff and level of experience in a leadership role over multiple providers and phases of construction for (*Insert Appropriate Experience Types*).

*XX% Factor*} Past performance of the firm including references about the quality of leadership of the firm in Consulting Services, the overall services of the firm to previous customers, the firm's ability to meet established project goals, the firm's response to the Owner's needs throughout the project, and the financial and technical success history of the of projects in which the firm provided leadership.

*XX% Factor*} Firm's apparent suitability to provide services for Project, including the firm's apparent fit to the project type and/or needs of the Owner, any special or unique qualifications for the Project, current and projected workloads, proximity of office or lead staff to Project location, and services offered by the firm. The firm's non-discrimination policies, any affirmative action policies and past efforts for W/MBE inclusion will be a part of this evaluation, as well as the firm's record and methodology of addressing public safety and environmental concerns.

## **Finalist Notification**

The names of the firms selected as finalists will be posted on the Georgia Procurement Registry. The firms selected as finalists will receive written notification (Finalist Notification) from the Owner which will address the necessary elements of the remainder of the selection process. These elements include, but may not be limited to, the following:

### **Pre-Interview Conference and Site Visit (if applicable)**

In the Finalist Notification, a mandatory pre-interview conference and site visit will be scheduled by the Owner and will include detailed instructions for finalists about the conference. At the conference, all finalist firms may be given relevant available information that has previously been developed (such as designs, studies, preliminary plans, maps, etc.), a specimen copy of the Consulting Services contract form, and other available additional scope information.

### **Project Proposal (if applicable)**

With the Finalist Notification, the Owner may issue a Request for Project Proposal from the firm. The Project Proposal will be submitted in a format prescribed by the Owner. It will include, at a minimum, (1) specific information on the firm's proposed leadership team and commitment thereof; and (2) a Consulting Services plan for the Project. Copies of this proposal shall be sent to the Owner prior to the interview at the time specified by the Owner in (See Section 3 RFQ Schedule of Events). Additional Project Proposal instructions and guidelines will be provided in the Notice to Finalists, as well as the criteria which will be used to evaluate the proposals.

### **Interview**

In the Finalist Notification, each finalist firm shall be informed of the place and time for the interview session. The time allotted to each firm will not exceed 90 minutes to include: 15 minutes for setup, 30 minutes for proposer presentation, 30 minutes for Committee questions, and 15 minutes for knockdown. Electronic presentations, such as PowerPoint presentations, are allowed but may not comprise more than 15 minutes of the 30 minute presentation. Although the Owner will have a screen and projector available in the interview room, presenter must be prepared with own projector and laptop for quick setup within the allotted 15 minutes as a backup. The remainder of the presentation may involve flip charts or boards along with oral presentation. Additional interview instructions and guidelines will be provided in the Notice to Finalists, as well as the criteria which will be used to evaluate the interview.

## Consultant Selection

Upon completion of the evaluation and interview process by the Selection Committee, the firms will be ranked using criteria described herein in descending order of recommendation. Negotiations may then be initiated with the highest-ranking firm to finalize the terms and conditions of the contract, including the fees to be paid. In the event a satisfactory fee agreement cannot be reached with the highest ranking firm, the Owner will formally terminate the negotiations in writing and enter into negotiations in turn with the second highest ranking firm, and so on until a mutual agreement is established and the Owner awards an A/E Consulting Services contract. The actual Form of Contract shall be developed by the Owner.

### 5. Instructions for Preparing Statements of Qualifications

A single PDF file of the statement of qualifications shall be prepared and emailed to (*Insert Selection Manager's Information*) prior to the submittal deadline. Each submittal must include a transmittal letter. Submittals must be able to print on standard (8 ½" x 11") paper. The pages of the qualification submittals must be numbered. A table of contents, with corresponding tabs, must be included to identify each section. Responses are limited to 20 pages or less using a minimum of an 11-point font. Any exhibits, affidavits, or other enclosure information called for may be included in an appendix and will not count toward the page limit. Each Statement of Qualifications shall provide a straightforward, concise delineation of respondent's capabilities. Fancy, colored displays, and promotional materials are not desired. Emphasis must be on completeness, relevance, and clarity of content. The content of all Statements of Qualifications must be categorized and numbered as outlined below, and responsive to all requested information:

#### A. Description and Resources of Firm

- i. Provide basic company information: Company name, address, name of primary contact, telephone number, fax number, email address, and company website (if available). If the firm has multiple offices, the qualification statement shall include information about the parent company and branch office separately. Identify office from which project will be managed and this office's proximity to the project site. Provide form of ownership, including state of residency or incorporation, and number of years in business. Is the offeror a sole proprietorship, partnership, corporation, Limited Liability Corporation (LLC), joint venture, or other structure?
- ii. Briefly describe the history and growth of your firm(s). Provide general information about the firm's personnel resources, including disciplines and numbers of employees and locations and staffing of offices
- iii. Has the firm been involved in any litigation in the past five years? Describe your experience with litigation with Owners, and/or Contractors. List any active or pending litigation and explain.
- iv. Provide a statement of disclosure, which will allow the Owner to evaluate possible conflicts of interest. Respondents must provide, in their own format, a statement of all potential legal or otherwise significant conflicts of interests possibly created by the respondent's being considered in the selection process or by the respondent's involvement in the project. Respondents should include information as to the nature of relationship(s) with parties in such potential conflict.

- v. Has the firm ever been removed from a Services contract, had a contract terminated for default, or failed to complete a contract as assigned?

## **B. Experience and Qualifications**

- i. Provide professional qualifications and description of experience for principal Consulting Services personnel. (At this stage, firms are asked for information on lead staff only, but may list qualifications and experience on more than one lead individual who is qualified and available for proposed project. If the firm is selected as finalist, the Owner will request detailed information on the exact proposed expanded team and their relevant experience.) Firms that respond as joint teams will be expected to clearly demonstrate their team members' shared experience, as a joint team, on prior projects of similar magnitude and complexity.
- ii. Provide information on the firm's A/E Consulting Services experience on projects of similar type, size, function, and complexity. Describe no more 10 and no less than five projects, in order of most relevant to least relevant, which demonstrate the firm's capabilities to perform the project at hand. For each project, the following information should be provided:
  - a. Project name, location, and dates during which services were performed.
  - b. Brief description of project and physical description (buildings, square footage, number of stories, site areas).
  - c. Services performed by your firm.
  - d. Owner's stated satisfaction level in the Consulting Services and/or overall service of your firm.
  - e. Owner contact information.
- ii. Describe the firm's experience and qualifications in a leadership role over multiple providers and phases of construction for (*Insert Specific Building Types*). Include any oversight of projects of relevant complexity, including experience in providing leadership in projects that utilize similar building methods and applications to that of incumbent project. Include any certifications, industry ratings, and achievement recognitions, etc., to attest to the level of experience and success. Describe innovations that the firm might have introduced or employed to increase the project's adherence to technical standards.

**C. Statement of Suitability**

- i. Provide any information that may serve to differentiate the firm from other firms in suitability for the project. Suitability may include, but is not limited to, the firm’s fit to the project and/or needs of the Owner, any special or unique qualifications for the project, current and projected workloads, the proximity of office to project location, and any services offered by the firm that may be particularly suitable for this project.
- ii. Provide any non-discrimination and affirmative action policies of the firm and the firm’s history of W/MBE inclusion in sourcing for projects.

**6. Submittal of Questions and Requests for Clarification**

Questions about any aspect of the RFQ, or the project, must be submitted in writing (email is preferable) to: *(Insert Selection Manager Information)*. The deadlines for submission of questions relating to the RFQ are the times and dates shown in the RFQ Schedule of Events in Section 3. Proposers are cautioned to review and adhere to the Restriction of Communication (See Section 8) for this Project.

**7. Submittal of Statements of Qualifications**

A single PDF file of the statement of qualifications shall be prepared and emailed to the *(Selection Manager Contact Information)* prior to the submittal deadline. Each submittal must include a transmittal letter. Submittals must be able to be printed on standard (8 ½” x 11”) paper and the words “Statement of Qualifications” and Project number must be clearly indicated in the filename. Statements of Qualifications must be received by the Owner prior to the deadline indicated in the Schedule of Events (See Section 3) at the exact address below:

*(Insert Contact Address and Email Information)*

**8. Additional Terms and Conditions**

**Restriction of Communication**

From the issue date of this (RFQ) solicitation until a successful proposer is selected and the selection is announced, proposers are not allowed to communicate about this solicitation or this Project for any reason with any members of the Selection Committee, the Owner, except for submission of questions as instructed in the RFQ, or during the proposer’s conference (if applicable), or as provided by any existing work agreement(s). For violation of this provision, the Owner reserves the right to reject the proposal of the offending proposer.

**Submittal Costs and Confidentiality**

All expenses for preparing and submitting responses are the sole cost of the party submitting the response. The Owner is not obligated to any party to reimburse such expenses. All submittals upon receipt become the property of the Owner. Labeling information provided in submittals “proprietary” or “confidential”, or any other designation of restricted use will not protect the information from public view.



Subject to the provisions of the Georgia Open Records Act, the details of the proposal documents will remain confidential until final award.

### **Award Conditions**

This request is not an offer to contract or a solicitation of bids. This request and any statement of qualifications or proposal submitted in response, regardless of whether the proposal is determined to be the best proposal, is not binding upon the Owner and does not obligate the Owner to procure or contract for any services. Neither the Owner nor any party submitting a response will be bound unless and until a written contract mutually accepted by both parties is negotiated as to its terms and conditions and is signed by the Owner and a party containing such terms and conditions as are negotiated between those parties. The Owner reserves the right to waive non-compliance with any requirements of this Request for Proposal and to reject any or all proposals submitted in responses. Upon receipt and review of responses, the Owner will determine the party(s) and proposal that in the sole judgment of the Owner is in the best interest of the Owner (if any is so determined), with respect to the evaluation criteria stated herein. The Owner then intends to conduct negotiations with such party(s) to determine if a mutually acceptable contract may be reached.

### **Statement of Agreement**

With submission of a statement of qualifications or proposal, the Proposer agrees that he/she has carefully examined the solicitation, and the Proposer agrees that it is the Proposer's responsibility to request clarification on any issues in any section of the solicitation with which the Proposer disagrees or needs clarified. The Proposer also understands that failure to mention these items in the proposal will be interpreted to mean that the Proposer is in full agreement with the terms, conditions, specifications and requirements in the therein. With submission of a proposal, the Proposer hereby certifies: (a) that this proposal is genuine and is not made in the interest or on behalf of any undisclosed person, firm, or corporation; (b) that Proposer has not directly or indirectly included or solicited any other Proposer to put in a false or insincere proposal; (c) that Proposer has not solicited or induced any person, firm, or corporation to refrain from sending a proposal.

**APPENDIX 3  
Sample Notice to Finalist**

*(Insert Date)*

**Notice to Selected Finalist- Project No. *(Insert Project Number)***

**To:** *(Insert Firm Name)*

**[By Email; Receipt Confirmation Requested]**

**Re:** **Project No. *(Insert Project Number)*: *(Insert Project Name, Location)* A/E Consulting Services**

On behalf of the Selection Committee for the Project referenced above, I congratulate you and your firm on being selected as a finalist for further consideration. This notice shall serve as an official request for additional required information and action from the finalists. As a finalist, your firm is required to:

- Attend the pre-proposal conference.
- Submit a Project Proposal.
- Interview with the Selection Committee.

The remaining Schedule of Events of the original RFQ is provided, below. Revised sections are highlighted:

d. Owner completes evaluation, posts results, and issues notification to finalist firms	(Insert dates)	-----
e. (If applicable) Owner conducts mandatory pre-proposal conference	"	1:00 PM
f. Deadline for submission of written questions from finalists	"	4:00 PM
g. Deadline for finalist firms to submit Project Proposal (If applicable)	"	2:00 PM
h. Selection Committee interviews finalist firms	"	TBA

**Pre-Proposal conference (if applicable)**

The pre-proposal conference and site visit date remains as originally scheduled. The conference and site visit will convene at *(Insert Time)* at the following address:

*(Insert Meeting Location)*

The Owner will release the additional project information to finalist firms at the site visit, including detailed current program information and a specimen contract. Any finalist questions generated before, during, or after the site visit must be submitted in writing to *(Insert Selection Manager Information)* in writing by the deadline indicated above.

## Project Proposal (if applicable)

In accordance with the RFQ, your firm must submit a Project Proposal, which will include:

### A. Team Proposal

Provide detailed information on the makeup of your proposed Consulting Services team; the organization, discipline, and function of each division; proposed Project-specific duties and relevant experience of key team members; organizational and technical relationship between team divisions and members; and, available resources and any advanced skills of the team. Information on any W/MBE representation of your team should be included.

### B. Consulting Services Plan

Using information available to your firm thus far, and including materials and information received at the pre-proposal conference or by other means from the Owner; provide a comprehensive conceptual plan for the services your firm will provide for the project, including proposed methodologies and techniques for all aspects of the Consulting Services of the specific Project.

The deadline for submittal of the Project Proposal (portions A and B only) shall remain as indicated in the Schedule of Events of the RFQ: *(Insert Time/Date)*. This submittal shall not exceed 20 pages. Six copies of the Consulting Services Proposal shall be sent to:

*(Insert Submittal Address/Contact)*

Please note: Do not submit Fee Proposals with this submittal.

## Interview

All finalist firms will be interviewed in accordance with the RFQ. The interviews will occur on *(Insert Dates)*, in the *(Location of Interviews)*. Presenters must first check in with the *(Check-in Contact)* before entering room. The order of the interviews will be determined at random (by draw) at the pre-proposal conference. The schedule is as follows:

	Finalist Setup Start	Presentation Start	Question Start	Interview Ends /Knockdown	Finalist Exit
First Interview- <i>(Insert Location)</i>	8:15 AM (Finalist A)	<b>8:30 AM</b>	<b>9:00 AM</b>	<b>9:30 AM</b>	9:45 AM
Second Interview- <i>(Insert Location)</i>	9:30 AM (Finalist B)	<b>9:45 AM</b>	<b>10:15 AM</b>	<b>10:45 AM</b>	11:00 AM
Third Interview- <i>(Insert Location)</i>	10:45 AM (Finalist C)	<b>11:00 AM</b>	<b>11:30 AM</b>	<b>12:00 Noon</b>	12:15 PM
Insert additional rows (up to 5 total)					

The time allotted to each firm will not exceed 90 minutes to include: 15 minutes for setup, 30 minutes for proposer presentation, 30 minutes for Committee questions, and 15 minutes for knockdown. Electronic presentations, such as PowerPoint presentations, are allowed but may not comprise more than 15 minutes of the 30-minute presentation. Although the Owner will have a screen and projector available in the interview room, presenter must be prepared with own projector and laptop for quick setup within the allotted 15 minutes as a backup. The remainder of the presentation may involve flip charts or boards along with oral presentation. The total number of representatives allowed in attendance per firm is six. The Committee wishes to hear from project managers and key proposed project personnel, more so than from executives or marketing staff. All members of the Selection Committee will be present during all the presentations and interviews. Other Owner guests may be present in the audience for training purposes or Selection Committee support. Firms shall not address any questions, prior to the interview, to anyone other than designated contact.

**Evaluation Criteria for the Remainder of the Selection:**

Consulting Services Proposals will be evaluated on:

*(Insert Criteria and Weights)*

Interviews will be evaluated on:

*(Insert Criteria and Weights)*

Again, please address any questions to my attention. Congratulations again to each of you.

*(Insert Selection Manager Signature)*

## Appendix 4 Sample Guide for Selection Committee Members (Step 1)

### Guideline for Evaluation (Step 1) Project No. *(Insert Project Number)*, *(Insert Project Name, Location)* Evaluation of (A/E) Statements of Qualifications

*This ENTIRE GUIDE must be reviewed carefully by all Selection Committee Members BEFORE the evaluation of submittals.*

#### Coordination and Communication

*(Insert Selection Manager Name)*, will manage the overall selection procedure and serve as facilitator of any Selection Committee meetings through the completion of the evaluation. All Committee members will receive copies of submittals and related information and will be notified of any proposed (if applicable) meetings, conference calls, and deadlines. Please note: All written communication (emails, memos, etc.) related to the evaluation can be subject to public record. Therefore, all such communication should be limited to objective, quantifiable information.

#### Evaluation of Eligible Submittals *(Insert Date for Evaluation Completion)*

Committee members must first review section *(Insert Section Number for "Statement of Qualifications")* of submittals to see if the respondents state compliance with the minimum qualifications. If the statement is complete, the submittal is eligible for further evaluation. (Full compliance will be verified upon further evaluation by Committee Members.) This solicitation required the following minimum qualifications:

- *(Insert Minimum Qualification Requirements)*

Submittals determined eligible must then be read thoroughly with careful attention to the presence of required submittal content. The reader should keep the evaluation criteria in mind when assessing each submittal. The reader should refer back to the second page of this guide (*Sections "I. Submittal Content"; and "II. Evaluation Criteria"*) frequently during review. For efficient submittal review and scoring, criteria for this evaluation are divided into the following main categories:

- *(Insert Major Criteria Categories and Corresponding Weight Factors)*

#### Directions for use of the Evaluation Scoring Forms:

Upon receipt of submittals, Scoring Forms will be distributed to all Selection Committee members along with copies of submittals received and validated. Members will be issued a scorer number, e.g., "Scorer 1", and will use their numbered Scoring Form for scoring all submittals. Using the criteria categories for this solicitation, each submittal will be given a preliminary score.

Scorers must not award more than the maximum allowable points for the criteria category. The maximum points (criteria weights) are indicated on the form. [Maximum] = highest or best possible score for the criteria category; and [One (1)] = lowest or worst possible score for the criteria category. (Actual scores will likely be

between those extremes). Scoring Forms can be accompanied by evaluator “notes”, which are not required. If a notation is warranted, it must be limited to objective, quantifiable information.

**Evaluation Meeting:**

All completed Scoring Forms with preliminary scores must be brought to the Selection Committee meeting planned for *(Insert Date)*. Discussion of the merits of the submittals and the overall evaluation will take place, and, if necessary, individual scores may be adjusted by original scorers. Once all individual scores are finalized, a final scoring will be summarized for Selection Committee approval.

**I. Submittal Content (Information required from respondents):**

**Statement of Qualifications  
(Deliverables “A”, “B”, and “C” for All Firms)**

*(Insert List of Deliverables)*

**II. Evaluation Criteria (How submittals are to be judged):**

*(Insert Evaluation Criteria Details)*

## Appendix 5 Sample Guide for Selection Committee Members (Step 2)

### Guideline for Evaluation (Step 2) Project No. *(Insert Project Number)*, *(Insert Project Name, Location)* Evaluation of Proposals and Interviews

#### Coordination and Communication

*(Insert Selection Manager Name)* will continue to coordinate the overall evaluation procedure and serve as facilitator of any Selection Committee meetings through the completion of the evaluation. All Committee members are reminded that all written communication (emails, memos, etc.) related to the evaluation can be subject to public record, and should be limited to objective, quantifiable information.

#### Evaluation of Project Proposals from Finalist Firms

Committee members must evaluate all proposals received from finalist firms. Submittals must be read thoroughly with careful attention to the evaluation criteria. The reader should refer to the evaluation criteria frequently during review. Criteria for this Project Proposal evaluation are divided into the following main categories:

- *(Insert Major Criteria Categories and Corresponding Weight Factors)*

#### Evaluation of Interviews of Finalist Firms

Committee members must evaluate all interviewed finalist firms. Members must keep careful attention to the evaluation criteria when listening to finalist's presentations and answers to questions. The member should refer to the evaluation criteria frequently during the interview. Criteria for this Project Team Interview evaluation are divided into the following main categories:

- *(Insert Major Criteria Categories and Corresponding Weight Factors)*

#### Directions for use of the Evaluation Scoring Forms:

Scoring Forms will be distributed to all Selection Committee members along with copies of submittals which received and validated by GSFIC. Each member will be issued a scorer number (*example:* "Scorer 1"). Each evaluator will use their numbered Scoring Form for scoring all submittals. Using the criteria categories for this solicitation, each submittal will be given a preliminary score by filling out ALL boxes in the yellow section to the left of the dotted line under the proposal criteria headings only (do not fill in boxes to the right of dotted line until after interviews).

Scorers must not award more than the maximum allowable points for the criteria category. The maximum points (criteria weights) are indicated on the form. [Maximum] = highest or best possible score for the criteria category; and [One (1)] = lowest or worst possible score for the criteria category. (Actual scores will likely be between those extremes). Scoring Forms can be accompanied by evaluator "notes", which are not required. If a notation is warranted, it must be limited to objective, quantifiable information.

## **Final Evaluation Meeting:**

All Scoring Forms with preliminary Proposal evaluation scores must be brought to the Interview sessions planned for *(Insert Date and Location)*. Selection committee members should arrive early *(Insert Time)* for brief interview planning. Bring questions that you want to ask all finalists in the interviews. Proposal / Interview requirements and evaluation criteria are attached to this guide for your use. After the interviews, a meeting to begin overall evaluation will take place, and, if necessary, individual proposal scores may be adjusted by original scorers. Once all individual scores are finalized, a final overall ranking including interview scores will be calculated for Selection Committee approval.

## **I. Project Proposal:**

### **(Deliverables “D”, And “E” For Finalist Firms Only)**

*(Insert List of Deliverables from Notice to Finalists)*

## **II. Evaluation Criteria:**

### **Criteria for the evaluation of project proposals**

*(Insert Criteria Details for Evaluation of Consulting Services Proposals)*

### **Criteria for the evaluation of finalist interviews:**

*(Insert Criteria Details for Evaluation of Interviews)*



## Appendix 6 Sample Reference Check Matrix

Reference Check, Project No. <i>(Insert Project Number)</i> A/E Consulting Services - <i>(Insert Project Name, Location)</i>					
	<b>Submitting Firms</b>				
<b>A. Questions (to be answered on 1-10 scale, 10 indicates best)</b>		<b>Firm A</b>	<b>Firm B</b>	<b>Firm C</b>	<b>Firm D</b>
1. Rate the firm's quality of Consulting for your project.					
	a				
	b				
	c				
	d				
	e				
	f				
section average					
2. Rate the overall services of the firm's staff for the duration of the project.					
	a				
	b				
	c				
	d				
	e				
	f				
section average					
3. Rate the firm's ability to meet the established project goals.					
	a				
	b				
	c				
	d				
	e				
	f				
section average					
4. Rate the firm's technical performance in Consulting					
	a				
	b				
	c				
	d				
	e				
	f				
section average					
<b>Overall Average</b>					

## **Appendix 7**

### **Sample Notification Letter to Highest-Ranked Firm**

*(Insert Owner Address)*

Date

*(Insert Proposer Address)*

Dear Mr. \_\_\_\_\_

**Re: Consulting Services, Project No. *(Insert Project Number)*, *(Insert Project Name, Location)***

On behalf of the Selection Committee for the above referenced project, I am pleased to inform you that your firm has been selected as the highest ranked firm and you are eligible to enter into contract negotiations for the advertised Consulting Services. You have my congratulations.

We have tentatively scheduled a meeting for *(Insert Date)* to give you an opportunity to clarify your firm's proposed services and fees and answer any questions we might have. We are prepared to provide your firm answers to your questions, including our desired contract schedule. Please contact me at your earliest convenience to confirm this date so that we can proceed to finalize the agreement for the services of your firm's team.

I must remind you that if we are unable to conclude a mutually agreeable contract for the required services in a reasonable amount of time, we will be obliged to terminate negotiations with your firm and enter into discussions with the second highest-ranked firm.

Sincerely,

*(Insert Selection Manager Name)*

cc: Selection Committee Members

## **Appendix 8**

### **Sample Notification Letter to Unsuccessful Firms**

*(Insert Owner Address)*

Date

*(Insert Proposer Address)*

Dear Mr. \_\_\_\_\_

**Re: Consulting Services, Project No. *(Insert Project Number)*, *(Insert Project Name, Location)***

On behalf of the Selection Committee for the above-referenced project, I wish to thank you and *(Insert Firm Name)* for submitting the qualifications of your team for the above referenced assignment. However, the Selection Committee has elected to engage another team led by *(Insert Consulting Firm)*.

We appreciate your interest in state of Georgia projects and hope you will continue to participate in our selection processes by responding to future opportunities.

Sincerely,

*(Insert Selection Manager Name)*

cc: Selection Committee Members