

University of Illinois

PROFESSIONAL and ARTISTIC SERVICES REQUEST FOR PROPOSALS SELECTION POLICY Including Construction Management Services and Landscape Architecture Services

The University of Illinois (“University”) undertakes, both in funding and management, capital projects at each of its three campuses. The University often determines that specific construction projects may benefit from the utilization of certain professional and artistic services. This policy sets forth the process and procedures related to securing these services.

PROFESSIONAL AND ARTISTIC SERVICES SELECTION

The selection of professional and artistic services shall be undertaken in accordance with the Illinois Procurement Code, 30 ILCS 500 Procurement of Professional & Artistic Services, The Joint Committee on Administrative Rules section 4.2035 (Competitive Selection procedures for Professional and Artistic Services), and section 3005(g) Construction and Construction and Construction Related Professional Services.

The process is a multi-step selection process to receive submissions to determine the best qualified proposers followed by discussions based on the criteria set forth in the solicitation to ultimately negotiate a contract to perform the required services. Refer to Professional and Artistic Services RFP Reference Documents for pertinent forms.

Process selection as follows:

I. EVALUATION COMMITTEE AND CRITERIA

A. Identify Evaluation Committee. The Professional Services Evaluation Committee (“Committee”) shall be comprised of three to eight individuals and will include, at a minimum, representatives of the Campus Construction Unit (“CCU”) and a representative for the client. The Committee shall be chaired by a representative of the CCU. The University Office of Capital Programs and Real Estate Services (“UOCP&RES”) shall have a representative on the Committee for projects that require approval by the Board of Trustees (“Board”). UOCP&RES may have a representative on the Committee for projects that require the approval of the Senior Associate Vice President of Business & Finance (“SAVPBF”) at the discretion of the SAVPBF. UOCP&RES may have a representative on the Committee for other projects at the discretion of the SAVPBF. Depending on the nature of the project, a representative of the physical plant may also be included on the committee. Each Committee member shall receive one vote. For Master Plan projects, the Committee shall be chaired by a representative of UOCP&RES. A sample checklist for the Committee Chair is attached.

- 1. The Vice Chancellor for Administrative Services at UIC, the Executive Director of Facilities and Services at Urbana, or the Associate Chancellor of Administrative Affairs at UIS shall approve all representatives to serve on the Committee.*

Committee members must attend all Committee meetings to vote. Changes to the Committee shall be approved by the CCU.

2. *For CDB managed projects, the Committee Chair shall offer CDB representation on the Committee.*
3. *Questions from vendors shall be answered by the Committee Chair, or designee.*

B. Develop Selection Criteria. Specific qualifications-based criteria shall be developed by the Committee Chair and reviewed by the Committee for each project. At a minimum, criteria shall include the evaluation of the firm's plan for performing the required services, evaluation of the firm's past performance of similar work, evaluation of the firm's ability to perform the services as reflected by technical training and education, general experience, specific experience in providing the required services and the qualifications and abilities of personnel proposed to be assigned to perform the services, and evaluation of the firm's personnel, equipment, and facilities to perform the services currently available or demonstrated to be made available at the time of contracting.

Additional criteria shall directly relate to the proposed scope of services and as allowed under the Act and Regulations. To demonstrate relevant experience, firms submitting for the project shall include examples of deliverables they have provided for previous projects that show the typical standard of professional care they produce for their clients. Submittals should also include examples of previous deliverables they produced during the construction phase of similar projects. Examples may include but are not limited to: schedule analysis during construction, progress meeting minutes, copies of monthly reports, daily progress reports, cash flow reports, and procurement logs. The document submittals should provide a good indication of attention to detail that these firms have typically given on previous projects.

1. *On CDB managed projects, all University recommended firms and their subconsultants shall be pre-qualified as required by CDB prior to the CDB's selection approval consideration.*
2. *The Business Enterprise for Minorities, Females and Persons with Disabilities Act (30 ILCS 575 et. Seq.) allows selection criteria for the initial evaluation to include a criterion to give points for a team's Minority Business Enterprise (MBE), Female Business Enterprise (FBE) or Persons with Disabilities Enterprise (PBE) status. Points should be awarded based on the level of MBE/FBE/PBE participation of the consultant and their subconsultants combined. To receive points for MBE/FBE/PBE participation, the firm must be certified by CMS. MBE/FBE/PBE points may be filled out based on the initial evaluation table prior to the initial evaluation form being distributed to the selection Committee.*
3. *A selection criterion shall be included that gives points to a firm with Veteran Owned Small Business (VOSB) or Service Disabled Veteran Owned Small Business (SDVOB) status as certified by CMS.*

4. *Initial selection criteria must be the same as the criteria listed in the advertised request for professional services.*

C. Committee Charge. The Committee shall perform the tasks as described in the policy and submit to the appropriate CCU, a preliminary ranking of, in order of qualification, more than one most qualified firm considered as best meeting the selection criteria for the project. For projects that require the approval of the Board or the SAVPBF, the final ranking and selection will be made by the SAVPBF after consultation with the Committee. The SAVPBF must provide a written explanation to be maintained in the project file if the recommendation of the Committee is not followed.

II. INITIAL EVALUATION of FIRMS

A. Advertisement. When project-specific selection criteria have been identified, an advertisement for a RFP for professional services shall be prepared by the CCU and forwarded to UOCP&RES for posting on the Illinois Procurement Bulletin/Public Institutions of Higher Education web site.

Advertisement Policy and Requirements:

1. *The advertisement shall be posted for a minimum of 15 days.*
2. *The advertisement shall state the initial evaluation criteria, the discussion meeting evaluation criteria, and give information regarding the submittal and selection process. The criteria are to be listed in priority order.*
3. *All advertisements shall be prepared on the Public Notice of Construction Related Professional Services form via Upside Contract system. (see attached sample)*
4. *Project approval must be current prior to submitting advertisement request.*
5. *Proposals shall include pricing proposals in a separate envelope.*
6. *Proposals shall be opened publicly.*
7. *If a request must be re-advertised, canceled or modified, contact UOCP&RES.*

B. Submittal of Statements of Qualifications. Firms shall submit statements of qualifications as prescribed in the advertisement. The official submittal is the electronic copy submitted in PRZM. *If PRZM does not receive the submittals properly, the Committee Chair must notify the AITS Help Desk to correct the problem.*

C. Review of Submittals. The Committee Chair or a delegate shall determine which submittals meet the minimum qualifications requested in the advertisement. The Committee shall review all the submittals meeting the minimum qualifications requested

in the advertisement. Pricing proposals shall not be reviewed until after ranking the best qualified proposers after the discussion meetings. A sample Initial Evaluation-Minimum Qualifications for evaluating submittals is attached.

Committee Chair shall review the Professional Services Consultant's (PSC) prior performance evaluation records for the past 3 years of any submitted firm that has had prior experience with the University. Committee Chair should check the Vendor Evaluation Module within the Vendor Services Application (VSA) for the stored performance evaluations. If a past substantial completion performance evaluation indicates an average composite score less than 3, the firm must be disqualified.

D. Verify Board of Elections Registration of Prime Firm. Committee Chair shall verify that all submitted firms are currently registered with the Board of Elections by checking the on-line registry. Any firm that is not registered must be disqualified.

E. Initial Evaluation. Each member of the Committee acting independently shall rank the firms on the initial evaluation form via PSC Selection Process (PSP). Estimates of costs or proposals in terms of dollars, hours required, percentage of construction cost or any other measure of compensation shall not be considered. Composite scoring is required to be completed **prior** to the Committee's discussing a recommendation. The Committee is expected to arrive at a consensus for a list of more than one firm. If consensus cannot be reached, a majority vote shall decide. There may be circumstances where it is appropriate for a Committee to recommend more or fewer firms.

F. Reference Phone Calls. After consultation with the Committee regarding issues and concerns, the Committee Chair must make reference calls on all initially selected firms. The same questions must be asked of each selected firm. The results of the reference calls shall be recorded by the Committee Chair and made available to all members of the Committee for their use. If a reference call results in information that may influence the Committee's decision to initially select a firm, the Committee Chair shall call another meeting to discuss. If the Committee decides to invite another firm to the discussion meeting, the Committee shall invite the firm ranked next highest in the initial evaluation.

III. SELECTION RECOMMENDATION

A. Determination of Need to Hold Discussion Meetings. The Committee shall determine if it is in the best interest of the University to have a discussion meeting with the initially selected firms. If the Committee determines that a discussion meeting is in the best interest of the University, the Committee must meet with all initially selected firms.

Reasons for not meeting with the initially selected firms must be set forth in writing and may include that a particular firm is obviously best qualified for a specific project. If the Committee determines a discussion meeting is unnecessary, they will conclude their evaluation responsibilities for the project by ranking the top firms in priority order and filing a written executive summary of their recommendation.

1. *The Committee's recommendation for initially selected firms shall be submitted electronically for approval by the appropriate CCU on the Approval Form for Firms to Be Invited to Discussion Meeting along with the Initial Evaluation forms and the Composite Evaluation form. For projects that must be approved by the Board or the SAVPBF, the Campus's recommendation shall be sent electronically to the SAVPBF for evaluation and for a final decision using the Approval Form for Firms to Be Invited to Discussion Meeting form (see attached sample). If the CCU or SAVPBF does not follow the recommendation of the Committee, a written explanation must be provided.*
2. *If an out-of-state firm is recommended by the Committee to be initially selected, the recommendation shall be approved by the SAVPBF before the initial selection process is declared complete and prior to any firms being notified.*
3. *Firms ranked without discussion meetings shall be approved by the SAVPBF prior to proceeding with recommendation using the Sample Letter for Discussion Meeting Waiver.*

B. Develop Discussion Meeting Questions. The Committee shall review the list of questions or topics relevant to the project listed in the advertisement. A sample discussion meeting evaluation form is attached. The questions or topics developed by the Committee and listed in the advertisement are to be asked at the meeting and submit those to the team prior to the meeting.

C. Notify Firms Of A Discussion Meeting. The firms to attend a discussion meeting are notified by the Committee Chair. The discussion meeting questions or topics developed by the Committee and listed in the advertisement shall be included in this notification along with the meeting time, place, and agenda, as well as other information that the Committee deems important. The Committee Chair shall notify firms not selected for a discussion meeting using the Sample Letter for the Team Not Selected for a Discussion Meeting.

The questions or topics used to evaluate the firms selected for a discussion meeting are to be listed in priority order. The Committee shall assign point values for each question, topic or criteria prior to the discussion meetings. A minimum value for each criteria shall be 100 points

D. Meet With Initially Selected Firms. If the Committee meets with the initially selected firms, the meeting agenda and the process shall be uniform in an effort to conduct fair and equal evaluations. If a team wishes to make changes to personnel or substitute a consultant from the information submitted, the firm must submit the request in writing to the Committee Chair 48 hours prior to a discussion meeting with an explanation why the change is necessary. The firm may be disqualified from consideration at the discretion of the Committee. A firm may, however, add a consultant to a team in addition to the consultants listed in the submittals at the discretion of the firm at any time and shall

notify the Committee Chair upon doing so. Professional cost/fees shall not be discussed at the meeting.

- E. Recommend and Rank Firms.** After the discussion meeting, each Committee member must evaluate the firms based on the discussion meeting questions on the electronic Discussion Meeting Evaluation form. Individual evaluation scoring forms must be completed prior to the Committees discussion and ranking of the firms. Composite scoring is required to be completed **prior** to the Committee discussing a recommendation. The evaluation committee shall strive for a consensus recommendation. In the absence of consensus, the Committee shall conduct a confidential vote in accordance with its own procedure, and determine a ranking by majority vote. The Committee Chair shall preside over all deliberations, and shall have an equal voice and vote. The electronic Discussion Meeting Evaluation form shall also be used to provide a composite evaluation of all of the individual Committee members' evaluations.

The Committee Chair shall prepare a written executive summary electronically using the Approval Form to Negotiate with Recommended Professional Services Consultant From Discussion Meeting which lists all Committee members, and the results of the Committee as a whole or majority rating of the firms including strengths or weakness of the top firms. Submittal will also include the Discussion Meeting Evaluation forms including the Composite Discussion Meeting Evaluation. The summary will also include the consultant and subconsultants location, the MBE/FBE/PBE status and the VOSB/SDVOSB status of the consultant and subconsultants, and the estimated percentage of work for the consultant and subconsultants. Estimates of costs or proposals in terms of dollars, hours required, percentage of construction cost or any other measure of compensation may not be considered or included in the summary.

- F. Notify Firms.** The Committee Chair shall electronically forward the Approval Form to Negotiate with Recommended Professional Services Consultant From Discussion Meeting of the Committee's rankings for review and comment by the Vice Chancellor for Administration at UIC, the Executive Director of Facilities and Services at Urbana, or the Associate Chancellor of Administrative Affairs at UIS. Once the Campus has approved, the executive summary will be sent electronically to UOCP&RES for review by the SAVPBF for projects that must be approved by the Board or approved by the SAVPBF. After acceptance, the selected firm shall be notified by the Committee Chair using the Sample Letter for Firm Selected from Discussion Meeting. Firms not selected shall be notified that they were not chosen for further consideration using the Firms Not Selected from Discussion Meeting letter (see sample letter). If a firm requests comments on the discussion meeting, they shall be given by the Committee Chair.

IV. FINAL SELECTION APPROVAL

NOTE: If the project is a Capital Development Board (CDB) managed project, the University's Board of Trustees or their delegated designees need to approve the selection

and forward it to CDB through UOCP&RES for final approval, fee negotiations, and contracting.

A. University Of Illinois Contract Negotiation (if not a CDB managed project)

1. After the firms are ranked and approved, the Committee Chair shall open the sealed price proposals and tabulate. If the low price is submitted by the best qualified vendor, the award may be made to the vendor. If the price of the best qualified vendor is not the lowest, but it does not exceed \$25,000, the SPO may award to that vendor. If the price of the best qualified vendor exceeds \$25,000, the SPO must state why a vendor other than the low priced vendor was selected and that determination shall be published in the Bulletin.
2. The Committee Chair shall negotiate a scope of services consistent with the advertisement for professional services, a list of deliverables, and a fee with the top ranked firm. If acceptable scope, deliverables, and fee cannot be negotiated, further negotiations with this firm shall be terminated. The second ranked firm shall be contacted and negotiations begin with that firm. This process shall be continued until a contract is successfully negotiated. If the Committee Chair is unable to negotiate a contract with any of the firms, the procurement shall be cancelled and the process may be restarted beginning with re-advertising for services.

B. Professional Service Approval Request. The Committee Chair shall prepare and electronically circulate the Professional Services Approval Request Form. Should a Board item be required, the CCU shall prepare a draft Board Item and forward to UOCP&RES.

The Committee's recommendation will be submitted electronically for approval on the Professional Services Approval Request. The recommendation will be submitted electronically for evaluation and a final decision to the Vice Chancellor for Administration at UIC, the Executive Director of Facilities and Services at Urbana, or the Associate Chancellor of Administrative Affairs at UIS. For projects that must be approved by the Board or the SAVPBF, the Campus's recommendation will be sent electronically to the SAVPBF for evaluation and for a final decision.

Once the Campus and the University approve the selection, a request for approval describing the reason for the proposed contract award decision will be made by the UOCP&RES to the State CPO or SPO. The State CPO or SPO may, as authorized in the Procurement Code, participate in the procurement prior to the request for approval.

All professional services employment shall be reported to UOCP&RES on the Required Procurement Posting Information form.

Pursuant to 30/ILCS 50-39, until the time of contract, communications between the campus construction units (and/or any other state employees involved in the discussions) and the firm shall be reported according to the requirements of the law.

C. Performance Evaluation. The CCU shall evaluate the performance of a PSC firm upon the completion of a contract.

All firms selected and contracted under the Professional and Artistic Services Selections policy, shall be formally evaluated per the PSC Evaluation Process

Additional evaluations may be completed at the discretion of each Project Manager. The following listed evaluations are considered optional and are intended to be used as a tool to provide feedback to the firm at different phases in the project.

Optional Evaluations: (Use Consultant Evaluation Optional form)

- *Standard Contract: at the end of Preconstruction phase*
- *Standard Contract: at the end of each Design phase (SD, DD, and CD).*
- *Standard Contract: at the end of the Post-Construction phase*

The results of the evaluation shall be given to the firm evaluated and each firm shall have an opportunity to respond in writing. All evaluations and responses from the firms shall be kept on file, and not made available to persons or firms outside the University. The evaluations and responses are exempt from the Freedom of Information Act. Any requests for information on firm's performance should be reviewed with Office of University Counsel.

An additional copy of the evaluation shall be stored electronically with access by designated people at all three campuses. The evaluations and PSC responses may be used in the PSC Selection Process for future projects. Information about the Professional Services Consultant Evaluation Summary and Electronic Storage Process is attached.

D. Project File Requirements. For all Professional and Artistic Services Selections, the CCU shall have a project file that contains:

1. A copy of the advertisement. (Upside Contract System)
2. All submitted booklets/letters of interest in response to the advertisement (PRZM).
3. Initial Evaluation forms for each Committee member. (PSC Selection Process)
4. Initial Evaluation composite form. (PSC Selection Process)
5. Approval Form for Firms to Be Invited to Discussion Meeting. (PSC Selection Process)
6. Signed copies of the letters sent to the firms to be invited to discussion meeting and not to be invited to discussion meeting.
7. Discussion Meeting Evaluation forms for each Committee member. (PSC Selection Process)
8. Discussion Meeting Composite Evaluation form. (PSC Selection Process)

9. Approval Form to Negotiate with Recommended Professional Services Consultant From Discussion Meeting. (PSC Selection Process)
10. Signed copies of the letters sent to the firms not selected from the discussion meetings and the firm recommended to be selected.
11. Professional Services Approval Request form. (PSC Selection Process)
12. Signed approval form by the State's COP or SPO (The e mail from UOCP&RES stating that the PPB has waived the 30 day review period is acceptable since PPB will not review until the CPO or SPO approves.)
13. A copy of the posting for the award of the contract.
14. Copies of the Professional Services Consultant's evaluations. (VSA)

E. Review. The UOCP&RES will produce a semi-annual review of Professional and Artistic Services Selections at each campus.

Professional and Artistic Services Selection

COMMITTEE CHAIR CHECKLIST

	TASK	Completion Date
1.	Verify project approvals have been completed	
2.	Form the Evaluation Committee with input from the planner/project manager	
3.	Review program statement with client for verification (knowledge transfer). Share statement with selection committee (optional)	
4.	Prepare Initial Evaluation Criteria and Discussion Meeting Questions with input from evaluation committee	
5.	Determine Project Classification and Type with the planner/project manager based on the Scope and Fee Negotiation Policy (if applicable)	
6.	Prepare PSC advertisement and file attachments (program) via Upside Contract Management System, and submit to UOCP&RES for review and posting to IPHEC website	
7.	Within PRZM: Create project (required for electronic PSC submittals to be uploaded); Complete AE Solicitation worksheet; Add the committee members to the team management	
8.	Publically open submittals (except price) as stated in the advertisement	
9.	Enter any additional evaluation criteria and discussion meeting questions that were listed on the advertisement via PSP	
10.	Prescreen submittals received to verify minimum qualifications are met via PSP	
11.	Check BOE on-line registry for all submitted firms	
12.	Verify MBE, FBE, PBR, and VOSB/SDVOSB certification, determine points based on policy (part of prescreening), and add the points to Initial Evaluation Minimum Qualifications prior to sending it to committee via PSP	
13.	Check prior performance evaluations on firms that have done work with the University of Illinois previously via VSA/CAPS	
14.	Distribute PSC submittals along with Initial Evaluation Form for review prior to initial evaluation meeting. Individual initial evaluation form must be submitted via PSP	
15.	Schedule Initial Evaluation meeting, compile composite scores via PSP, and facilitate a consensus for firms to be invited to a discussion meeting	
16.	Confirm discussion meeting questions that were listed on the advertisement with committee members	
17.	Check references for all firms to be invited	
18.	Submit Approval Form for Firms to Be Invited to Discussion Meeting via PSP	
19.	Notify selected firms and schedule meetings via phone and letter. Include Discussion Meeting Questions	
20.	Notify unsuccessful firms via letter	
21.	Schedule final evaluation committee meeting (to be after discussion meeting) to decide a recommendation	

Professional and Artistic Services Selection

COMMITTEE CHAIR CHECKLIST

22.	Enter Discussion Meeting questions and distribute Discussion Meeting Evaluation Form via PSP. Individual Discussion Meeting Evaluation Form must be submitted via PSP	
23.	Act as chair during Discussion Meetings with introductions and brief overview of process	
24.	Compile composite scores via PSP and facilitate final evaluation committee meeting to determine a recommendation in rank order	
25.	Open, tabulate, and upload the sealed pricing proposals to Approval Form to Negotiate with Recommended Professional Services Consultant from Discussion Meeting via PSP	
26.	Submit Approval Form to Negotiate with Recommended Professional Services Consultant from Discussion Meeting via PSP	
27.	Notify successful firm of selection and request proposal	
28.	Review proposal and determine fee range with campus unit (If Applicable)	
29.	Negotiate with approved firm (contract, scope, schedule and fee)	
30.	Submit Professional Services Approval Request via PSP; justify if lowest fee was not submitted by selected firm and notify UOCP&RES	
31.	Send negotiated contract to PSC for signatures with letter indicating not to begin work until they receive a fully executed contract.	
32.	Prepare Board item for next meeting and approval (if applicable)	
33.	Notify unsuccessful interviewed firms via letter	
34.	Submit award to UOCP&RES for publishing to IPHEC website/submit to PPB	
35.	Start contract routing for University signatures	
36.	Issue fully executed agreement to PSC	
37.	PSC starts work	
38.	Negotiate potential contract Amendments	
39.	Negotiate any contract disputes	
40.	Perform performance evaluations as required	

University of Illinois at **Campus**

RFP #RFPproject number

Request for Proposal: **Project Name****Consultant Profession Selection**First published: **Date**Sealed proposals will be accepted at the address below until TIME AM/PM, **Date**:**Proposal**

The Proposal shall be submitted in separate parts clearly marked as follows:

Part A: General Information (# copies)**Part B: Previous Project Experience (# copies)****Part C: Project Scope of Services and Organization (# copies)****Part D: Sealed Compensation Proposal (# copies)**

Send all proposals to:

The Board of Trustees of the University of Illinois
c/o **Unit**Attention: **Responsible individual, e-mail address, and phone number**
Street, City, State, Zip Code**Submission and Opening of Qualification Statement:**

Each firm will be required to submit their proposals by the deadline of **TIME a.m./p.m.**, prevailing time, on **Date**. Proposal parts A, B and C combined (**# copies**) and separate Sealed Compensation Proposal Part D (**# copies**) shall be delivered to the address shown above. Immediately following the deadline date and time, all proposals will be publicly opened in **Room, Street Address, City, State, Zip code**.

The electronic copy of the proposal (Parts A, B and C only) shall be submitted in pdf format, using the URL **Specific Campus PRZM URL address** to complete and submit the information. **The electronic copy shall be submitted using the web at the URL listed and will not be accepted via e-mail.** The electronic submittal is the official submittal of record. Firm shall be disqualified if an electronic submittal is not received. Firms shall notify contact person above of any technical problems. **Part D, Sealed Compensation Proposal, must not be submitted electronically.**

Description of Project:**Text (including a project schedule)**

Note: The project will be administered using the University's web-based project management system. PRZM was developed to maximize the potential of the Internet in allowing project team members to access and exchange project information. PRZM supports team collaboration in management and interaction, as well as a team member empowerment on a multi-layer security system.

Minimum user requirements are as follows:

- Internet Browser: Microsoft Internet Explorer version 4.0 or higher is recommended.
- E-mail: PRZM requires the user to have a valid e-mail account.
- Computer-Aided Drawing (CAD) viewer

Outline of Consultant Services:

Consultant services required under this contract may include, but is not limited to, the following:

Description of Services

Qualification Requirements:

The University of Illinois encourages firms to submit proposals for providing Consultant services. Only those firms that meet the following qualifications will be considered for the short list discussion selection:

- Professional staff licensed or registered and authorized to practice in the State of Illinois as applicable
- Registered and authorized to do business in the State of Illinois
- Acceptance of the terms and conditions of the University of Illinois' provisions in:
 - Standard Professional Agreement
 - Errors and Omissions Policy
 - Scope and Fee Policy
- Registered to practice as a Professional Design Firm with the Illinois Department of Financial and Professional Regulation as applicable
- In good standing with the State of Illinois and meeting all statutory and certification requirements required by the State.
- Registered with the State Board of Elections at time of proposal as required by 30 ILCS 500/20-160.
- All vendors are required to comply with applicable provisions of the Illinois Procurement Code (30 ILCS 500/1 et seq)
- For a prime firm that has prior experience with the University of Illinois, a minimum average score of 3 on performance evaluations over the last three years.

Evaluation Criteria:

The following project-related criteria will be used to evaluate the firms requesting consideration for selection and is listed in order of importance:

- The plan for performing the required services.
- Ability to perform the services as reflected by the technical training and education, general experience, specific experience in providing the required services and abilities of personnel proposed to be assigned to perform the services
- The personnel, equipment and facilities to perform the services currently available or demonstrated to be made available at the time of contracting

- A record of past performance of similar work
- Demonstrated inclusion of MAFBE team members meeting or exceeding the University's goal of 20% participation on the firm's team and on recent similar projects. Illinois Department of Central Management Services (CMS) Business Enterprise Program certification is the basis for determination of MAFBE status.
- Demonstrated inclusion of VOSB/SDVOSB meeting or exceeding the University's goal of 3% participation on the firm's team and on recent similar projects. Illinois Department of Central Management Services (CMS) Business Enterprise Program certification is the basis for determination of VOSB/SDVOSB status.
- Other specific requirements as described by the CCU

Proposal Organization and Content:

The Proposal should be organized as follows:

Part A – General Information:

Tab 1: Introduction letter

Tab 2: General description of firm, philosophy, accomplishments, value

Tab 3: General description of project understanding and challenges

Tab 4: Provide relevant project experience including complete project descriptions and Minority and Female Business Enterprise (MAFBE) and Veteran Owned Small Business Enterprise and Service Disabled Veteran Owned Small Business Enterprise VOSB/SDVOSB participation for comparable projects.

Tab 5: Client references (minimum of 3 required – including name, title, address, telephone number, related project and date, reference's participation in project)

Tab 6: Contractor references (minimum of 5 required – including name, title, address, telephone number, related project and date, reference's participation in project)

Tab 7: PSC (AE) references (minimum of 5 required – including name, title, address, telephone number, related project and date, reference's participation in project)

Tab 8: Completed and signed Certifications and Statutory Requirements form and completed and signed Financial Disclosures and Potential Conflicts of Interest forms
 Note: In lieu of submitting these forms in each proposal and in PRZM, the proposer may submit a single completed and signed copy of the forms in a sealed envelope with the required hard copies of the proposal to the contract person listed in this advertisement.

Tab 9: Provide copies from selected projects demonstrating the firm's typical practice of the following deliverables:

- Descriptions provided by Campus Construction Unit

Tab 10: MBE/FBE/PBE/VOSB/SDVOSB information for Consultant and Sub-consultant(s). Only MBE/FBE/PBE/VOSB/SDVOSB firms certified with the Illinois Department of Central Management Services (CMS) are acceptable. Certification must be current and valid at the time of proposal.

One of the following must be provided with the proposal for each identified MBE/FBE/PBE/VOSB/SDVOSB vendor:

- **(PREFERRED)** A print version of the vendor's Illinois Department of Central Management Services (CMS) Business Enterprise Program (BEP) Vendor Directory results. This profile includes the vendor name, address, ethnicity, county, contact info, in addition to certification, renewal and expiration dates;

- A copy of the vendor's current and valid IL CMS MBE/FBE/PBE/VOSB/SDVOSB Certification Letter; or
- A copy of the vendor's current and valid IL CMS MBE/FBE/PBE/VOSB/SDVOSB Recognition Certification Approval letter.

The IL CMS BEP Vendor Directory can be found at

<https://www2.illinois.gov/cms/business/sell2/Pages/VendorSearch.aspx> and a

tutorial for using the directory is available at

http://www.uocpres.uillinois.edu/UserFiles/Servers/Server_992653/file/documents/CMStutorial.pdf

Tab 11: Work History Form which can be found at:

<http://www.uocpres.uillinois.edu/common/pages/DisplayFile.aspx?itemId=1024900>

Tab 12: 5 year audited financial statement

Tab 13: Additional Information on all sub-consultants as appropriate.

Part B – Previous Project Experience:

Firms shall submit descriptions of the last 3-5 facilities that most clearly match the scope of this project where the firm provided phase services.

Information should include the following:

- Project description
- Scope
- Unique characteristics
- Unique challenges
- Specific accomplishments
- Project location
- PSC firm, project manager, project designer
- Urban or suburban setting
- Site constraints
- Size/GSF/NSF
- Number of stories
- Schedules
 - Original
 - Actual
 - Schedule proposals should include activities from beginning to end of construction and include the following activities: Construction, Substantial Completion, Occupancy, and Final Completion.
- Project budget
- Construction budget
- Cost estimating
 - Cost/GSF @ original estimate
 - Cost/GSF @ time of bid
 - Cost/GSF @ final completion
- Cost of all changes
- Final construction cost
- Number of change orders
- Percentage of changes due to changes in project scope
- Construction delivery method (GC, CM, other)

- Number of requests for information (RFIs)
- Firm's project staff, including principal, project manager
- Firm's primary consultants (if any)
- Owner/Client contact information
- PSC contact information

In addition to the above project specific information, the firm shall include a description of the deliverables that the firm provides at the end of the following phase(s) of the project:

- List Phases

Part C: Project Scope of Services and Organization

Section A:

Tab 1: Project organization during each phase

Tab 2: Detailed description of consultant services including CCU adds text. Process and proposal includes all typical tasks such as CCU adds text to be executed in accordance with Illinois Procurement Law and University Policy.

Section B: Staffing

Tab 1: Comprehensive staffing matrix. Matrix shall include the names of all planned staff and indicate project hours for each month through the duration of the project for each staff member. Include all sub-consultant(s), MBE/FBE firm(s), and VOSB/SDVOSB certified by the Illinois Department of Central Management Services (CMS) Business Enterprise Program (BEP), and define the degree to which they will be used. Include a print version of MAFBE vendor's and VOSB vendor's CMS BEP Vendor Directory results located at

<https://www2.illinois.gov/cms/business/sell2/Pages/VendorSearch.aspx> and a tutorial for using the directory is available at

http://www.uocpres.uillinois.edu/UserFiles/Servers/Server_992653/file/documents/CMStutorial.pdf.

NOTE: MBE/FBE goals and VOSB/SDVOSB are separate and distinct from workforce projections. The MBE/FBE goal for this proposal is 20% of the Consultant's contract value. Provide in this tab MBE/FBE participation as a % of total price, NOT the \$ value. The VOSB/SDVOSB goal for this proposal is 3% of the Consultant's contract value. Provide in this tab MBE/FBE participation as a % of total price, NOT the \$ value.

Tab 2: Resumes of staff that will be actively involved in the project by project phase including relevant project experience.

Section C: Consultant Agreement

Tab 1: Firm shall evaluate the proposed Consultant Agreement accompanying this RFP in Attachment A and specifically respond to the University regarding acceptance of the proposed Agreement. Firm shall indicate any sections that Firm cannot accept as written with justification.

Part D - The Sealed Compensation Proposal should be organized as follows:

Note: The sealed compensation proposal shall be clearly marked and sealed in a separate envelope and not mentioned anywhere else in the proposal package.

Tab 1: Staffing Matrix – Using the staffing matrix submitted in Part C above, assign the respective rates and indicate the total extended cost for each assigned individual.

Tab 2: Prepare a matrix indicating Consultant monthly total cost over the project duration that will be incurred. Include specific values of MBE/FBE and VOSB/SDVOSB sub-consultant's participation by month and for total project.

Tab 3: Compensation Proposal Summary – Itemize the total project compensation using the Fees Proposal Template shown in Attachment B.

Proposals review process for Parts A, B, C and D:

Using the evaluation criteria stated in this RFP, the University will review and rank the qualifications of the firms who submit and render a decision regarding which Consulting firms (more than 1) will move to a discussion phase. After discussions are completed, pricing proposals from all initial proposers will be opened and tabulated. Pricing negotiations will begin with the highest ranked firm(s) from discussions to ultimately award a single contract.

Proposers should note this RFP will be an expedited process and the selected firms that will move on to the discussion phase will be allowed approximately 10 days to respond and be prepared for more detailed discussions.

The University may determine that the discussion phase is not necessary and select based on the initial evaluation.

Discussion process:

Firms may be requested to participate in a discussion meeting.

Firms that are selected to move to the discussion phase will be evaluated based on the following criteria:

Discussion evaluation criteria listed in order of importance;

1. Response to questions shown in Attachment C. (If any additional questions are added to the questions shown in Attachment C based on proposal review, the revised questions will be sent to the vendor prior to the discussion meeting.)
2. Consultant's interaction with each other and the University.
3. Quality and content of discussion.

These discussion evaluation criteria will be used to score each selected firm to determine final rankings. Subsequent contract negotiations between the highest ranked firm and the Board of Trustees of the University of Illinois will be undertaken to ultimately reach an executed contract.

Post-Performance Review:

After final completion of services, but before final payment, the University will conduct a post-performance review of the consultant services provided and this review will be made part of the procurement file.

The University of Illinois encourages diversity among its vendors, including the participation of firms and consultants owned by minorities, females and persons with disabilities. The University strives to meet voluntary contract goals established in the Business Enterprise for Minorities, Females and Persons with Disabilities Act (30 ILCS 575 et seq.) as well as subsequent adoption by the Business Enterprise Council. The University reserves the right to set separate contract goals on specific prime contracts with subcontracting possibilities based on the type of work or services or sub-contractor availability.

Projected percentage of work for Consultant firm and Sub-consultants stated will be the expected minimum percentage goal(s) utilized in final executed contract documents should the firm be selected.

If you have any questions or concerns regarding the agreement or policies, please call the contact person listed prior to the submittal due date.

PROTEST REVIEW OFFICE; Vendors may submit a written protest to the Protest Review Office following the requirements of the Higher Education Standard Procurement Rules 44 ILL.ADMIN.CODE 4.5550. For protests related to specifications, the Protest Review Office must physically receive the protest no later than 14 days after the solicitation or related addendum was posted to the Bulletin. For protest of business no later than 14 days after the protesting party knows or should have known the facts giving rise to the protest. The Protest Review Office's information is as follows:

Chief Procurement Office
Attn: Protest Review Office
Suite 513 Stratton Office Building
401 South Spring Street
Springfield, IL 62706
Phone: (217) 558-3724
Facsimile: (217) 558-2164
Illinois Relay: (800) 526-0844

If the protest is submitted via e mail, it must be sent to both of the following email addresses:

Adam.Alstott@illinois.gov
EEC.CPOHE@illinois.gov

Highlighted areas in gray on the electronic boilerplate are for input by the Campus Construction Units.

Boilerplate approved as of 5/8/13; any changes to boilerplate language must be pre-approved by the University Office of Capital Programs and Real Estate Services.

Request for Proposal
Attachment A – Consultant Agreement

**See “SampleConsultantAgreement.pdf” attachment to
IPHEC posting RFPnumber**

Attachment B – Compensation Proposal Summary

Consultant proposed fee shall include:

1. Text provided by CCU

Attachment C – Discussion questions to be answered

1. Text provided by CCU
2. Additional questions may be added based on proposal review

A/E Criteria - Evaluation Phase

Name: _____

Date: _____

Project: _____

Rate each firm in each category from 1 - 10 with 10 being the highest rating.

FIRM														
State of Illinois, Is primary firm in good standing? (Exceptions include sole LLP or sole proprietor) http://www.ilsos.gov/corporatellc/														
Prime firm licensed in State of Illinois? (www.IDFPR.com, License Look-Up, Design Firm Professional Registration)														
Letter of Interest included?														
UI Work-In_Progress/Work History Form for PSC?														
UI Work-In_Progress/Work History Form for each of the PSC's subs?														
Prequalified with CDB? Copy of CDB prequalification letter included? (Prime Only)														
CDB SF 255 Form complete and signed?														
PSC MAFBE Certification for Prime (Section 7 & 7a)														
Copy of CDB Prequalification Application Section 12: Summary of Specific Project Work included?														
Copy of CDB Prequalification Application Section 13: Other or Previous Firm Names for Prime?														
Electronic version in PRZM														
Sealed envelope with Certifications and Statutory Requirements/ Financial Disclosures and Potential Conflicts of Interest														
Certificate of Registration with State Board of Elections for Prime provided?														
All Key Personnel and Consultants are identified and resumes provided?														

PRELIMINARY REVIEW - TO BE COMPLETED BY PLANNER & PA

A/E Criteria - Evaluation Phase

Name: _____

Date: _____

Project: _____

Rate each firm in each category from 1 - 10 with 10 being the highest rating.

FIRM														
1 Current commitments of firm, proposed staff and consultants.														
2 Prior experience of the proposed project staff in the design and construction of similar projects.														
3 Overall design quality of the relevant projects submitted.														
4 MAFBE participation of Professional Service Consultant and sub-consultants.														
5														
6														
7														
8														
9														
10														
Totals:	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Committee Members:

Comments:

1st Choice: _____

2nd Choice: _____

3rd Choice: _____

Consultant Selection Procedure Update
MAFRE and VOISB Initial Selection Points
 12/19/2014

The following tables for awarding points will be used for the three possible respondent scenarios:
MAFRE Participation Only, VOISB Participation Only, and MAFRE & VOISB Participation

Typical Point Allocation for MAFRE/PRE Participation Initial Evaluation

Cost in CBS	0%	1-9%	10-19%	20-29%	30-39%	40-50%	60-79%	80-100%
1	0	1	2	3	4	5	6	7
2	0	1	2	3	4	5	6	7
3	0	1	2	3	4	5	6	7
4	0	1	2	3	4	5	6	7
5	0	1	2	3	4	5	6	7
6	0	1	2	3	4	5	6	7
7	0	1	2	3	4	5	6	7
8	0	1	2	3	4	5	6	7
9	0	1	2	3	4	5	6	7
10	0	1	2	3	4	5	6	7
11	0	1	2	3	4	5	6	7
12	0	1	2	3	4	5	6	7
13	0	1	2	3	4	5	6	7
14	0	1	2	3	4	5	6	7
15	0	1	2	3	4	5	6	7
16	0	1	2	3	4	5	6	7

- Assumptions/Guidelines**
- 1) Members of teams identified as a MAFRE/PRE or VOISB/NOVOISB must have CMS
 - 2) The participation expressed as a voluntary goal is to be obtained from the 5 CBS SF
 - 3) Each individual CBS criteria has a maximum value of 10 points; criteria shall not be

VOISB Participation Only

Typical Point Allocation for VOISB/NOVOISB Participation Initial Evaluation

Cost in CBS	0%	1-2%	3% or +
1	0	1	2
2	0	1	2
3	0	1	2
4	0	1	2
5	0	1	2
6	0	1	2
7	0	1	2
8	0	1	2
9	0	1	2
10	0	1	2
11	0	1	2
12	0	1	2
13	0	1	2
14	0	1	2
15	0	1	2
16	0	1	2

- Assumptions/Guidelines**
- 1) Members of teams identified as a MAFRE/PRE or VOISB/NOVOISB must
 - 2) The participation expressed as a voluntary goal is to be obtained from
 - 3) Each individual CBS criteria has a maximum value of 10 points; criteria

VOISB and MAFRE Participation

Typical Point Allocation for MAFRE/PRE Participation Initial Evaluation

Cost in CBS	0%	1-9%	10-19%	20-29%	30-39%	40-50%	60-79%	80-100%
1	0	1	2	3	4	5	6	7
2	0	1	2	3	4	5	6	7
3	0	1	2	3	4	5	6	7
4	0	1	2	3	4	5	6	7
5	0	1	2	3	4	5	6	7
6	0	1	2	3	4	5	6	7
7	0	1	2	3	4	5	6	7
8	0	1	2	3	4	5	6	7
9	0	1	2	3	4	5	6	7
10	0	1	2	3	4	5	6	7
11	0	1	2	3	4	5	6	7
12	0	1	2	3	4	5	6	7
13	0	1	2	3	4	5	6	7
14	0	1	2	3	4	5	6	7
15	0	1	2	3	4	5	6	7
16	0	1	2	3	4	5	6	7

- Assumptions/Guidelines**
- 1) Members of teams identified as a MAFRE/PRE or VOISB/NOVOISB must have CMS
 - 2) The participation expressed as a voluntary goal is to be obtained from the 5 CBS SF
 - 3) Each individual CBS criteria has a maximum value of 10 points; criteria shall not be

Typical Point Allocation for VOISB/NOVOISB Participation Initial Evaluation

Cost in CBS	0%	1-2%	3% or +
1	0	1	2
2	0	1	2
3	0	1	2
4	0	1	2
5	0	1	2
6	0	1	2
7	0	1	2
8	0	1	2
9	0	1	2
10	0	1	2
11	0	1	2
12	0	1	2
13	0	1	2
14	0	1	2
15	0	1	2
16	0	1	2

A/E Criteria - Evaluation Phase

Name: _____
 Date: _____
 Project: _____

PLANNER	PRELIMINARY REVIEW - TO BE COMPLETED AS DEFINED	PLANNING ASSISTANT	FIRM																					
			CDB SF 255 Form complete																					
			Electronic version in PRZM																					
			Prequalified with CDB? Copy of CDB prequalification letter included? (Prime Only)																					
			Certifications and Statutory Requirements/ Financial Disclosures and Potential Conflicts of Interest.																					
			Is primary firm in good standing? (Exceptions include sole LLP or sole proprietor) http://www.ilos.gov/corporatellc/																					
			Prime firm licensed in State of Illinois? (www.IDFPR.com, License Look-Up, Design Firm Professional Registration)																					
			State of the office doing the work																					
			Evaluation from past performance. (0-5 or n/a if they have not worked on campus)																					
			Letter of Interest included?																					
UI Work-In Progress/Work History Form for PSC?																								
UI Work-In Progress/Work History Form for each of the PSC's subs?																								
PSC MAFBE Certification for Prime (Section 7 & 7a)																								
Copy of CDB Prequalification Application Section 12: Summary of Specific Project Work included?																								
Copy of CDB Prequalification Application Section 13: Other or Previous Firm Names for Prime?																								
BOE registration of prime firm verified with on line registry																								
PASS, FAIL, or HOLD!																								
Rate each firm in each category from 1 - 10 with 10 being the highest rating.																								
PLANNER	PRELIMINARY REVIEW - TO BE COMPLETED AS DEFINED	PLANNING ASSISTANT	MAFBE participation of Professional Service Consultant and sub-consultants with a goal of 20%. Illinois Department of Central Management Services (CMS) Business Enterprise Program certification is the basis for determination of MAFBE status.																					
			VOSB/SDVOSB participation of Professional Services Consultant and Sub-consultants with a goal of 3%. Illinois department of Central management Services (CMS) Business enterprise Program certification is the basis for determination of VOSB/SDVOSB																					
OPTIONAL	SELECTION COMMITTEE																							
Totals:				0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
Sub-Consultants:	MEP:																							
	Food Services:																							
	Interiors:																							
	Structural:																							
	Civil:																							
	Cost Estimating:																							
	Misc.:																							
	Misc.:																							
	Misc.:																							
	Hazardous Materials:																							
	Comments																							

Committee Members:

Comments (required):

1st Choice: _____
 2nd Choice: _____
 3rd Choice: _____

A/E Criteria - Evaluation Phase

Name: _____
 Date: _____
 Project: _____

	FIRM																		
PLANNING ASSISTANT	CDB SF 255 Form complete																		
	Electronic version in PRZM																		
	Prequalified with CDB? Copy of CDB prequalification letter included? (Prime Only)																		
	Certifications and Statutory Requirements/ Financial Disclosures and Potential Conflicts of Interest																		
	Is primary firm in good standing? (Exceptions include sole LLP or sole proprietor)																		
	http://www.ilsoa.gov/corporate/ Prime firm licensed in State of Illinois? (www.IDFFPR.com, License Look-Up, Design Firm Professional Registration)																		
	State of the office doing the work																		
	Evaluation from past performance. (0-5 or n/a if they have not worked on campus)																		
	Letter of Interest included?																		
	UI Work-In Progress/Work History Form for PSC?																		
	UI Work-In Progress/Work History Form for each of the PSC MAFBE Certification for Prime (Section 7 & 7a)																		
	Copy of CDB Prequalification Application Section 12: Summary of Specific Project Work included?																		
	Copy of CDB Prequalification Application Section 13: Other or Previous Firm Names for Prime?																		
	BOE registration of prime firm verified with on line registry																		
	PASS, FAIL, or HOLD!																		
Rate each firm in each category from 1 - 10 with 10 being the highest rating.																			
PLANNER	MAFBE participation of Professional Service Consultant and sub-consultants with a goal of 20%. Illinois Department of Central Management Services (CMS) Business Enterprise Program certification is the basis for determination of MAFBE status																		
	VOSB/SDVOSB participation of Professional Services Consultant and Sub-consultants with a goal of 3%. Illinois department of Central management Services (CMS) Business enterprise Program certification is the basis for determination of VOSB/SDVOSB																		
	Confirm commitments of firm, proposed staff and consultants. Prior experience of the proposed project staff in the design and construction of similar projects. Expertise and success in construction cost estimating.																		
SELECTION COMMITTEE	Totals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Sub-Consultants: MEP:																		
	Food Services:																		
	Interiors:																		
Structural:																			
Civil:																			
Cost Estimating:																			
Misc.:																			
Misc.:																			
Misc.:																			
Hazardous Materials:																			
OPTIONAL	Comments																		

Committee Members:

Comments (required):

1st Choice: _____
 2nd Choice: _____
 3rd Choice: _____

A/E Criteria - Evaluation Phase

Name: _____
Date: _____
Project: _____

PRELIMINARY REVIEW - TO BE COMPLETED AS DEFINED PLANNER	FIRM																				
	CDB SF 255 Form complete																				
	Electronic version in PRZM																				
	Prequalified with CDB? Copy of CDB prequalification letter included? (Prime Only)																				
	Certifications and Statutory Requirements/ Financial Disclosures and Potential Conflicts of Interest																				
	Is primary firm in good standing? (Exceptions include sole LLP or sole proprietor)																				
	http://www.ilsoos.gov/corporate/llc/																				
	Prime firm licensed in State of Illinois? (www.IDFPR.com, License Look-Up, Design Firm Professional Registration)																				
	State of the office doing the work																				
	Evaluation from past performance. (0-5 or n/a if they have not worked on campus)																				
	Letter of Interest included?																				
	UI Work-In Progress/Work History Form for PSC?																				
	UI Work-In Progress/Work History Form for each of the PSCs sub?																				
	PSC MAFBE Certification for Prime (Section 7 & 7a)																				
	Copy of CDB Prequalification Application Section 12: Summary of Specific Project Work included?																				
	Copy of CDB Prequalification Application Section 13: Other or Previous Firm Names for Prime?																				
	BOE registration of prime firm verified with on line registry																				
	PASS, FAIL, or HOLD!																				
	Rate each firm in each category from 1 - 10 with 10 being the highest rating.																				
	MAFBE participation of Professional Service Consultant and sub-consultants with a goal of 20%. Illinois Department of Central Management Services (CMS) Business Enterprise Program certification is the basis for determination of MAFBE status																				
	VOSB/SDVOSB participation of Professional Services Consultant and Sub-consultants with a goal of 3%. Illinois department of Central management Services (CMS) Business enterprise Program certification is the basis for determination of VOSB/SDVOSB																				
	Confirm commitments of firm, proposed staff and consultants.																				
	Prior experience of the proposed project staff in the design and construction of similar projects.																				
	Expertise and success in construction cost estimating.																				
	Totals:	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sub-Consultants:																					
MEP:																					
Food Services:																					
Interiors:																					
Structural:																					
Civil:																					
Cost Estimating:																					
Misc.:																					
Misc.:																					
Misc.:																					
Hazardous Materials:																					
Comments																					

Committee Members:

Comments (required):

1st Choice: _____
2nd Choice: _____
3rd Choice: _____

A/E Criteria - Evaluation Phase

Name: _____
 Date: _____
 Project: _____

PLANNING ASSISTANT	FIRM																	
	CDB SF 255 Form complete																	
	Electronic version in PRZM																	
	Prequalified with CDB? Copy of CDB prequalification letter included? (Prime Only)																	
	Certifications and Statutory Requirements/ Financial Disclosures and Potential Conflicts of Interest																	
	Is primary firm in good standing? (Exceptions include sole LLP or sole proprietor) http://www.ilos.gov/corporatelle/																	
	Prime firm licensed in State of Illinois? (www.IDFPR.com, License Look-Up, Design Firm Professional Registration)																	
	State of the office doing the work																	
	Evaluation from past performance. (0-5 or n/a if they have not worked on campus)																	
	Letter of Interest included?																	
UI Work-In Progress/Work History Form for PSC?																		
UI Work-In Progress/Work History Form for each of the PSC MAFBE Certification for Prime (Section 7 & 7a)																		
Copy of CDB Prequalification Application Section 12: Summary of Specific Project Work included?																		
Copy of CDB Prequalification Application Section 13: Other or Previous Firm Names for Prime?																		
BOE registration of prime firm verified with on line registry																		
PASS, FAIL, or HOLD!																		
Rate each firm in each category from 1 - 10 with 10 being the highest rating.																		
PLANNER	MAFBE participation of Professional Service Consultant and sub-consultants with a goal of 20%. Illinois Department of Central Management Services (CMS) Business Enterprise Program certification is the basis for determination of MAFBE status																	
	VOSB/SDVOSB participation of Professional Services Consultant and Sub-consultants with a goal of 3%. Illinois department of Central management Services (CMS) Business enterprise Program certification is the basis for determination of VOSB/SDVOSB																	
SELECTION COMMITTEE	Confirm commitments of firm, proposed staff and consultants.																	
	Prior experience of the proposed project staff in the design and construction of similar projects.																	
	Expertise and success in construction cost estimation.																	
Totals:	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Sub-Consultants:																		
MEP:																		
Food Services:																		
Interiors:																		
Structural:																		
Civil:																		
Cost Estimating:																		
Misc.:																		
Misc.:																		
Misc.:																		
Hazardous Materials:																		
Comments																		

Committee Members:

Comments (required):

1st Choice: _____
 2nd Choice: _____
 3rd Choice: _____

A/E Criteria - Evaluation Phase

Name: _____

Date: _____

Project: _____

PRELIMINARY REVIEW - TO BE COMPLETED AS DEFINED	PLANNING ASSISTANT	FIRM																											
		CDB SF 255 Form complete																											
		Electronic version in PRZM																											
		Prequalified with CDB? Copy of CDB prequalification letter included? (Prime Only)																											
		Certifications and Statutory Requirements/ Financial Disclosures and Potential Conflicts of Interest																											
		Is primary firm in good standing? (Exceptions include sole LLP or sole proprietor) http://www.ilsos.gov/corporate/ill/																											
		Prime firm licensed in State of Illinois? (www.IDFPR.com License Look-Up, Design Firm Professional Registration)																											
		State of the office doing the work																											
		Evaluation from past performance: (0-5 or n/a if they have not worked on campus)																											
		Letter of Interest included?																											
		UI Work-In Progress/Work History Form for PSC?																											
		UI Work-In Progress/Work History Form for each of the PSC's subs?																											
		PSC MAFBE Certification for Prime (Section 7 & 7a)																											
		Copy of CDB Prequalification Application Section 12: Summary of Specific Project Work included?																											
		Copy of CDB Prequalification Application Section 13: Other or Previous Firm Names for Prime?																											
		BOE registration of prime firm verified with on line registry																											
		PASS, FAIL, or HOLD!																											
		Rate each firm in each category from 1 - 10 with 10 being the highest rating.																											
		MAFBE participation of Professional Services Consultant and sub-consultants with a goal of 20%. Illinois Department of Central Management Services (CMS) Business Enterprise Program certification is the basis for determination of MAFBE status	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
		VOSB/SDVOSB participation of Professional Services Consultant and Sub-consultants with a goal of 3%. Illinois department of Central management Services (CMS) Business enterprise Program certification is the basis for determination of VOSB/SDVOSB	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
		The plan for performing the required process	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Ability of personnel to perform the services (technical training, education, experience)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
	Personnel, equipment and facilities to perform the services	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
	Record of past performance of similar work	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
	Totals:	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
OPTIONAL	SELECTION COMMITTEE	MEP:																											
		<i>Food Services:</i>																											
		<i>Interiors:</i>																											
		<i>Structural:</i>																											
		<i>Civil:</i>																											
		<i>Cost Estimating:</i>																											
		<i>Misc.:</i>																											
		<i>Misc.:</i>																											
		<i>Misc.:</i>																											
		<i>Hazardous Materials:</i>																											
	<i>Comments</i>																												

Committee Members: Comments

1st Choice: _____
 2nd Choice: _____
 3rd Choice: _____

Evaluator's signature:

Consultant Selection Procedure Update
Diverse Business Initial Selection Points

June 06, 2016

The following tables for awarding points will be used for the two possible respondent scenarios:

Both MBE/FBE/PBE & VOSB/SDVOSB Participation Goals Met (Table 1) and Either MBE/FBE/PBE or VOSB/SDVOSB Participation Goals are NOT Met (Table 2)

TABLE 1 – Both MBE/FBE/PBE (20%) & VOSB/SDVOSB (3%) Participation Goals Met

Point Allocation for Initial Evaluation for MBE/FBE/PBE & VOSB/SDVOSB Participation

No. of Individual QBS Criteria	Total MBE/FBE/PBE & VOSB/SDVOSB % Participation in QBS Submittal					
	0%	1—9%	10—22%	23—36%	37—50%	51-100%
4	N/A	N/A	N/A	3	3	4
5	N/A	N/A	N/A	3	4	5
6	N/A	N/A	N/A	4	5	6
7	N/A	N/A	N/A	5	6	7
8	N/A	N/A	N/A	6	7	8
9	N/A	N/A	N/A	7	8	9
10	N/A	N/A	N/A	8	9	10
11	N/A	N/A	N/A	8	9	10
12	N/A	N/A	N/A	8	9	10
13	N/A	N/A	N/A	8	9	10
14	N/A	N/A	N/A	8	9	10
15	N/A	N/A	N/A	8	9	10
16	N/A	N/A	N/A	8	9	10

Assumptions/Guidelines

- 1) Members of teams identified as a MBE/FBE/PBE or VOSB/SDVOSB must have CMS BEP certification to be considered a MBE/FBE/PBE or VOSB/SDVOSB when submittal is made.
- 2) The participation expressed as a voluntary goal is to be obtained from the IL CDB SF 255 form from the subject QBS submittal.
- 3) Each individual QBS criteria has a maximum value of 10 points; criteria shall not be weighted.

TABLE 2 – Either MBE/FBE/PBE (20%) or VOSB/SDVOSB (3%) Participation Goals NOT Met

Point Allocation for Initial Evaluation for MBE/FBE/PBE & VOSB/SDVOSB Participation

No. of Individual QBS Criteria	Total MBE/FBE/PBE & VOSB/SDVOSB % Participation in QBS Submittal					
	0%	1—9%	10—22%	23—36%	37—50%	51-100%
4	0	0	1	2	2	3
5	0	0	1	2	3	4
6	0	1	1	3	4	5
7	0	1	2	4	5	6
8	0	1	2	5	6	7
9	0	1	3	6	7	8
10	0	2	4	7	8	9
11	0	2	4	7	8	9
12	0	2	4	7	8	9
13	0	2	4	7	8	9
14	0	2	4	7	8	9
15	0	2	4	7	8	9
16	0	2	4	7	8	9

Assumptions/Guidelines

- 1) Members of teams identified as a MBE/FBE/PBE or VOSB/SDVOSB must have CMS BEP certification to be considered a MBE/FBE/PBE or VOSB/SDVOSB when submittal is made.
- 2) The participation expressed as a voluntary goal is to be obtained from the IL CDB SF 255 form from the subject QBS submittal.
- 3) Each individual QBS criteria has a maximum value of 10 points; criteria shall not be weighted.

PROJECT TITLE: _____

EVALUATION COMMITTEE MEMBERS: _____

APPROVAL FORM FOR FIRMS TO BE INVITED TO DISCUSSION MEETING

DATE: _____

SUBMITTED BY: _____

FIRMS RECOMMENDED FOR INVITATION: (include firm’s team composition and each member’s percentage of work, MBE/WBE/PBE and VOSB/SDVOSB status, prime location and brief statement of strength and weakness of each recommended firm.

RECOMMENDATION SUPPORTED BY DOCUMENTATION: ____Yes ____No

REASON FOR RECOMMENDATION:

APPROVED:

[] Senior Assoc. VP of Business & Finance

Signature/Date: _____

[] Director of Campus Construction Unit

Signature/Date: _____

Attached: Initial individual and composite evaluation matrices

APPROVAL FORM TO NEGOTIATE WITH RECOMMENDED PROFESSIONAL SERVICES CONSULTANT FROM DISCUSSION MEETING

DATE: _____

SUBMITTED BY: _____

DATE(S) OF DISCUSSION MEETING: _____

FIRMS AT DISCUSSION MEETINGS listed in descending order of rank: (include firm’s team composition and each member’s percentage of work (if different from initial selection), MBE/FBE/PBE and VOSB/SDVOSB status (if different from initial selection), location, and a brief statement weakness and strength of each recommended firm

RECOMMENDED FIRM: _____

RECOMMENDATION SUPPORTED BY DOCUMENTATION: ___ Yes ___ No

REASON FOR RECOMMENDATION: _____

APPROVED:

Senior Assoc. VP of Business & Finance

Signature/Date: _____

Director of Campus Construction Unit

Signature/Date: _____

PROFESSIONAL SERVICES APPROVAL REQUEST

(Not required for Retainer Professional Services Selections)

University Project No. _____ CDB Project No. _____

PROFESSIONAL SERVICES FIRM NAME/ADDRESS: _____

BASIC SERVICES FEE IS WITHIN RANGE OF THE UNIVERSITY'S SCOPE/FEE POLICY? ___ Yes ___ No

ESTIMATED CONSTRUCTION BUDGET FROM FCPWeb: _____

PHASES INCLUDED ON PSA:

Program Definition	\$
Schematic Design	\$
Design Development	\$
Construction Documents	\$
Bid	\$
Construction	\$
On-site Observation	\$
Warranty	\$
Reimbursables	\$
Interiors	\$
Other	\$
Total	\$

Note: For CDB managed projects, the fees are negotiated by CDB at a later date.

Professional Services Approval (signature according to current delegated authority level)

BOT (via University Office of
Capital Programs and Real Estate Services)

PM Initials: ___ BOT Date: _____

Senior Assoc. VP of Business & Finance

Signature/Date: _____

Director of Campus Construction Unit

Signature/Date: _____

All professional services employment requiring QBS shall be reported as specified to the University Office of Capital Programs and Real Estate Services.

REQUIRED PROCUREMENT POSTING INFORMATION

PROJECT NAME

NOTICE OF CONTRACT FOR PROFESSIONAL SERVICES

Notice is hereby given of a professional services agreement between the Board of Trustees of the University of Illinois and **Professional Services Consultant's name, City, State** dated **date** for the **project name (Project #)** in the amount of \$.

NOTE:

To be submitted along with this form for posting to the Illinois Higher Education Procurement Bulletin:

- Certification and Statutory Requirements form
- Financial Disclosures and Conflict of Interest form
- Initial Evaluation Documentation
- Interview Evaluation Documentation
- COI determination from PPB (if applicable)
- Attachment C from PSA

SAMPLE LETTER FOR DISCUSSION MEETING WAIVER

DATE

Mr. Mike Bass
Senior Associate Vice President of Business
and Finance & Deputy Comptroller
Suite 340 Illini Union Bookstore MC-309

Re: PROJECT

Dear Mr. Bass,

In accordance with the provisions within the *University of Illinois, Capital Professional Services RFP Selection Policy*, a waiver of the discussion meetings is possible for the following reasons:

- A. Familiarity by the campus construction unit of the short listed firms.
- B. One of the short listed firms is obviously most qualified for a specific project.
- C. Qualifications, workload distribution and MAFBE criteria position this firm to be at the highest ranking.

The evaluation committee has met on the above referenced project and makes the following recommendations in ranking order:

1. [FIRM NAME]
2. [FIRM NAME]
3. [FIRM NAME]

The committee feels that [FIRM NAME] meets criteria [LETTER DESIGNATION FROM ABOVE] as specified in the policy. The evaluation committee's evaluation finds [JUSTIFICATION].

Accordingly, your approval is requested to accept [FIRM NAME, CITY, STATE] as the recommended consultant without discussion meeting.

Sincerely,

Campus Construction Unit Director

Consultant Discussion Meeting Matrix

Project Name: xxx

Project No. xxx

INDIVIDUAL EVALUATION

Date

#6

Score:1-5 # 1 = Worst # 5 = Best	Consultant Name		Consultant Name		Consultant Name		Consultant Name	
	#	Comments	#	Comments	#	Comments	#	Comments
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
TOTAL	0		0		0		0	

Name: _____ Date: _____

Consultant Discussion Meeting Matrix

Project Name: xxx

Project No. xxx

Date

#6

Score:1-5 # 1 = Worst # 5 = Best	Consultant Name		Consultant Name		Consultant Name		Consultant Name	
	#	Comments	#	Comments	#	Comments	#	Comments
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
TOTAL	0		0		0		0	

Name: _____ Date: _____

Consultant Discussion Meeting Matrix

Project Name: xxx

Project No. xxx

Date

#6

Score:1-5 # 1 = Worst # 5 = Best	Consultant Name		Consultant Name		Consultant Name		Consultant Name	
	Subconsultant #1 Subconsultant #2 Subconsultant #3		Subconsultant #1 Subconsultant #2 Subconsultant #3		Subconsultant #1 Subconsultant #2 Subconsultant #3		Subconsultant #1 Subconsultant #2 Subconsultant #3	
Q U E S T I O N S	#	Comments	#	Comments	#	Comments	#	Comments
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
TOTAL	0		0		0		0	

Name: _____ Date: _____

Consultant Discussion Meeting Matrix

Project Name: xxx

Project No. xxx

Date

#6

Score:1-5 # 1 = Worst # 5 = Best	Consultant Name		Consultant Name		Consultant Name		Consultant Name	
	Subconsultant #1 Subconsultant #2 Subconsultant #3		Subconsultant #1 Subconsultant #2 Subconsultant #3		Subconsultant #1 Subconsultant #2 Subconsultant #3		Subconsultant #1 Subconsultant #2 Subconsultant #3	
Q U E S T I O N S	#	Comments	#	Comments	#	Comments	#	Comments
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
TOTAL	0		0		0		0	

Name: _____ Date: _____

Consultant Discussion Meeting Matrix

Project Name: xxx

Project No. xxx

COMPOSITE EVALUATION

Date

#6

Score:1-5 # 1 = Worst # 5 = Best	Consultant Name		Consultant Name		Consultant Name		Consultant Name	
	Subconsultant #1 Subconsultant #2 Subconsultant #3		Subconsultant #1 Subconsultant #2 Subconsultant #3		Subconsultant #1 Subconsultant #2 Subconsultant #3		Subconsultant #1 Subconsultant #2 Subconsultant #3	
Q U E S T I O N S	#	Comments	#	Comments	#	Comments	#	Comments
1	0		0		0		0	
2	0		0		0		0	
3	0		0		0		0	
4	0		0		0		0	
5	0		0		0		0	
6	0		0		0		0	
7	0		0		0		0	
8	0		0		0		0	
9	0		0		0		0	
10	0		0		0		0	
TOTAL	0		0		0		0	

Name: _____ Date: _____

SAMPLE LETTER – SELECTED TEAM FOR DISCUSSION MEETING

DATE

CONTACT

FIRM

ADDRESS

RE: Project

Dear MR./MS.:

Your team has been selected by the University to attend a discussion meeting for the professional architectural and engineering services required for this unique project.

A standard scope of services for the architect/engineer will be developed by the University for this project and will form the basis of the fee proposal.

Enclosed is the anticipated scope of the project. If there are other issues or aspects of the project that you feel should be included, we will be prepared to discuss those during the meeting.

In considering teams to be employed for this project, prior experience in the design and construction of similar projects, particularly the firm experience in developing feasibility studies for similar facilities is critical. Excellence in the architectural design of renovating existing facilities, including those demonstrating historical considerations is essential. A commitment to the project from a principal within the firm, and an organization of sufficient capacity to undertake such a project to meet the schedule developed by the University is also essential.

A meeting regarding this project has been scheduled at the UIC,UIUC,UIS campus in ROOM # of the BUILDING,DATE. Your meeting will begin at TIME.

The process will take approximately one hour and the focus of the meeting will be the responses to the questions prepared by the selection committee and given to the consultant. Key members of the team should be present at the meeting (e.g., principal-in-charge, project manager). The methodology and anticipated schedule for the project will also be discussed.

The agenda for the meeting is suggested to be as follows:

- Introduction and opening remarks University of Illinois (5 minutes)
- Consultant's responses to the prepared questions (45 minutes)
- Closing remarks by consultant (5 minutes)
- Closing remarks by University of Illinois (5 minutes)

O:\FORMS\Interview
Letter.doc

The evaluation committee is comprised of individuals who will be involved during the entire course of the project and are as follows:

INSERT EVALUATION COMMITTEE

At the completion of the meetings, the committee will evaluate each firm based upon specific criteria that will assist in selecting an architect/engineer for this project. At that time, the firm selected will be requested to submit a fee proposal for the professionals services desired based on the negotiated scope of services agreed upon.

Should you wish to obtain any drawings or tour the **SITE** prior to your meeting please contact **CONTACT NAME AND PHONE**.

Pre Meeting and Site Visit ***(Optional) DATE, TIME, PLACE.***

By responding to the advertisement, the firm is assumed to comply with all statutory certifications and provisions and to accept the standard terms and conditions of the University of Illinois' standard Professional Services Agreement, Errors and Omissions Policy and Scope and Fee Negotiation Policy.

We look forward to meeting with your firm to discuss this project. If you have any questions or wish to discuss this project further, please call this office.

Sincerely,

Name
Chairperson of Evaluation Committee

c: Evaluation Committee



**SAMPLE LETTER – NOT SELECTED TEAM TO ATTEND A
DISCUSSION MEETING**

DATE

FIRM
ADDRESS

RE: PROJECT TITLE

Dear Mr. :

While the committee was impressed with your qualifications, your firm was not one of the firms recommended to be interviewed.

We thank you and the members of your firm for the time spent putting together the brochure that you provided us.

Thank you for your interest in the University of Illinois.

Sincerely,

Name
Chairperson Evaluation Committee

Copies: Evaluation Team

PROJECT TITLE: _____

EVALUATION COMMITTEE MEMBERS: _____

**APPROVAL FORM FOR FIRMS TO BE INVITED TO
DISCUSSION MEETING**

DATE: _____

SUBMITTED BY: _____

FIRMS RECOMMENDED FOR INVITATION: (include firm's team composition and each member's percentage of work, MBE/WBE/PBE and VOSB/SDVOSB status, prime location and brief statement of strength and weakness of each recommended firm.

RECOMMENDATION SUPPORTED BY DOCUMENTATION: ____Yes ____No

REASON FOR RECOMMENDATION:

APPROVED:

Senior Assoc. VP of Business & Finance

Signature/Date: _____

Director of Campus Construction Unit

Signature/Date: _____

Attached: Initial individual and composite evaluation matrices

**APPROVAL FORM TO NEGOTIATE WITH RECOMMENDED
PROFESSIONAL SERVICES CONSULTANT FROM
DISCUSSION MEETING**

DATE: _____

SUBMITTED BY: _____

DATE(S) OF DISCUSSION MEETING: _____

FIRMS AT DISCUSSION MEETINGS listed in descending order of rank: (include firm's team composition and each member's percentage of work (if different from initial selection), MBE/FBE/PBE and VOSB/SDVOSB status (if different from initial selection), location, and a brief statement weakness and strength of each recommended firm

RECOMMENDED FIRM: _____

RECOMMENDATION SUPPORTED BY DOCUMENTATION: ___Yes ___No

REASON FOR RECOMMENDATION: _____

APPROVED:

Senior Assoc. VP of Business & Finance

Signature/Date: _____

Director of Campus Construction Unit

Signature/Date: _____

PROFESSIONAL SERVICES APPROVAL REQUEST

(Not required for Retainer Professional Services Selections)

University Project No. _____ CDB Project No. _____

PROFESSIONAL SERVICES FIRM NAME/ADDRESS: _____

BASIC SERVICES FEE IS WITHIN RANGE OF THE UNIVERSITY'S SCOPE/FEE POLICY? ___Yes ___No

ESTIMATED CONSTRUCTION BUDGET FROM FCPWeb: _____

PHASES INCLUDED ON PSA:

Program Definition	\$
Schematic Design	\$
Design Development	\$
Construction Documents	\$
Bid	\$
Construction	\$
On-site Observation	\$
Warranty	\$
Reimbursables	\$
Interiors	\$
Other	\$
Total	\$

Note: For CDB managed projects, the fees are negotiated by CDB at a later date.

Professional Services Approval (signature according to current delegated authority level)

BOT (via University Office of Capital Programs and Real Estate Services)

PM Initials: ___ BOT Date: _____

Senior Assoc. VP of Business & Finance

Signature/Date: _____

Director of Campus Construction Unit

Signature/Date: _____

All professional services employment requiring QBS shall be reported as specified to the University Office of Capital Programs and Real Estate Services.

REQUIRED PROCUREMENT POSTING INFORMATION

PROJECT NAME

NOTICE OF CONTRACT FOR PROFESSIONAL SERVICES

Notice is hereby given of a professional services agreement between the Board of Trustees of the University of Illinois and **Professional Services Consultant's name, City, State** dated **date** for the **project name (Project #)** in the amount of **\$**.

NOTE:

To be submitted along with this form for posting to the Illinois Higher Education Procurement Bulletin:

- Certification and Statutory Requirements form
- Financial Disclosures and Conflict of Interest form
- Initial Evaluation Documentation
- Interview Evaluation Documentation
- COI determination from PPB (if applicable)
- Attachment C from PSA

SAMPLE LETTER FOR FIRM SELECTED FROM DISCUSSION MEETING

Date

CONTACT PERSON

FIRM NAME

FIRM ADDRESS

RE: PROJECT NAME

Dear Mr./Mrs. NAME,

The evaluation committee for the PROJECT TITLE has recommended to the Board of Trustees that your firm be employed for PROJECT TITLE.

The committee was impressed with your firm's qualifications and your firm best met all of the specific criteria developed by the University. We look forward to working with your firm on this project.

Should you have any questions, please call.

Sincerely,

NAME

Chairperson of the Evaluation Committee

C: Evaluation Committee

SAMPLE LETTER FOR FIRMS NOT SELECTED FROM DISCUSSION MEETING

DATE

FIRM
ADDRESS

RE: PROJECT TITLE

Dear Mr./Ms:

The evaluation committee for the PROJECT TITLE has recommended that the University of Illinois Board of Trustees be requested to employ FIRM SELECTED for the PROJECT TITLE. While the committee was impressed with your qualifications, the firm selected met all of the specific criteria developed by the University.

Thank you and the members of your firm for the time spent with the interview committee and in preparing for the interview.

Thank you for your interest in the University of Illinois.

Sincerely,

NAME
Chairperson of the Evaluation Committee

C: Evaluation Committee

PROJECT TITLE: _____
EVALUATION COMMITTEE MEMBERS: _____

APPROVAL FORM FOR FIRMS TO BE INVITED TO DISCUSSION MEETING

DATE: _____

SUBMITTED BY: _____

FIRMS RECOMMENDED FOR INVITATION: (include firm's team composition and each member's percentage of work, MBE/WBE/PBE and VOSB/SDVOSB status, prime location and brief statement of strength and weakness of each recommended firm.

RECOMMENDATION SUPPORTED BY DOCUMENTATION: ____Yes ____No

REASON FOR RECOMMENDATION: _____

APPROVED:

Senior Assoc. VP of Business & Finance

Signature/Date: _____

Director of Campus Construction Unit

Signature/Date: _____

Attached: Initial individual and composite evaluation matrices

APPROVAL FORM TO NEGOTIATE WITH RECOMMENDED PROFESSIONAL SERVICES CONSULTANT FROM DISCUSSION MEETING

DATE: _____

SUBMITTED BY: _____

DATE(S) OF DISCUSSION MEETING: _____

FIRMS AT DISCUSSION MEETINGS listed in descending order of rank: (include firm's team composition and each member's percentage of work (if different from initial selection), MBE/FBE/PBE and VOSB/SDVOSB status (if different from initial selection), location, and a brief statement weakness and strength of each recommended firm

RECOMMENDED FIRM: _____

RECOMMENDATION SUPPORTED BY DOCUMENTATION: ____Yes ____No

REASON FOR RECOMMENDATION: _____

APPROVED:

Senior Assoc. VP of Business & Finance

Signature/Date: _____

Director of Campus Construction Unit

Signature/Date: _____

PROFESSIONAL SERVICES APPROVAL REQUEST

(Not required for Retainer Professional Services Selections)

University Project No. _____ CDB Project No. _____

PROFESSIONAL SERVICES FIRM NAME/ADDRESS: _____

BASIC SERVICES FEE IS WITHIN RANGE OF THE UNIVERSITY'S SCOPE/FEE POLICY? ____Yes ____No

ESTIMATED CONSTRUCTION BUDGET FROM FCPWeb: _____

PHASES INCLUDED ON PSA:

Program Definition	\$
Schematic Design	\$
Design Development	\$
Construction Documents	\$
Bid	\$
Construction	\$
On-site Observation	\$
Warranty	\$
Reimbursables	\$
Interiors	\$
Other	\$

Total _____ \$

Note: For CDB managed projects, the fees are negotiated by CDB at a later date.

Professional Services Approval (signature according to current delegated authority level)

- BOT (via University Office of Capital Programs and Real Estate Services)
- Senior Assoc. VP of Business & Finance
- Director of Campus Construction Unit

PM Initials: _____ BOT Date: _____

Signature/Date: _____

Signature/Date: _____

All professional services employment requiring QBS shall be reported as specified to the University Office of Capital Programs and Real Estate Services.

REQUIRED PROCUREMENT POSTING INFORMATION

PROJECT NAME

NOTICE OF CONTRACT FOR PROFESSIONAL SERVICES

Notice is hereby given of a professional services agreement between the Board of Trustees of the University of Illinois and Professional Services Consultant's name, City, State dated date for the project name (Project #) in the amount of \$.

NOTE:

To be submitted along with this form for posting to the Illinois Higher Education Procurement Bulletin:

- Certification and Statutory Requirements form
- Financial Disclosures and Conflict of Interest form
- Initial Evaluation Documentation
- Interview Evaluation Documentation
- COI determination from PPB (if applicable)
- Attachment C from PSA

PROJECT TITLE: _____

EVALUATION COMMITTEE MEMBERS: _____

APPROVAL FORM FOR FIRMS TO BE INVITED TO DISCUSSION MEETING

DATE: _____

SUBMITTED BY: _____

FIRMS RECOMMENDED FOR INVITATION: (include firm's team composition and each member's percentage of work, MBE/WBE/PBE and VOSB/SDVOSB status, prime location and brief statement of strength and weakness of each recommended firm.

RECOMMENDATION SUPPORTED BY DOCUMENTATION: ____Yes ____No

REASON FOR RECOMMENDATION: _____

APPROVED:

Senior Assoc. VP of Business & Finance

Signature/Date: _____

Director of Campus Construction Unit

Signature/Date: _____

Attached: Initial individual and composite evaluation matrices

APPROVAL FORM TO NEGOTIATE WITH RECOMMENDED PROFESSIONAL SERVICES CONSULTANT FROM DISCUSSION MEETING

DATE: _____

SUBMITTED BY: _____

DATE(S) OF DISCUSSION MEETING: _____

FIRMS AT DISCUSSION MEETINGS listed in descending order of rank: (include firm's team composition and each member's percentage of work (if different from initial selection), MBE/FBE/PBE and VOSB/SDVOSB status (if different from initial selection), location, and a brief statement weakness and strength of each recommended firm

RECOMMENDED FIRM: _____

RECOMMENDATION SUPPORTED BY DOCUMENTATION: ____Yes ____No

REASON FOR RECOMMENDATION: _____

APPROVED:

Senior Assoc. VP of Business & Finance

Signature/Date: _____

Director of Campus Construction Unit

Signature/Date: _____

PROFESSIONAL SERVICES APPROVAL REQUEST

(Not required for Retainer Professional Services Selections)

University Project No. _____ CDB Project No. _____

PROFESSIONAL SERVICES FIRM NAME/ADDRESS: _____

BASIC SERVICES FEE IS WITHIN RANGE OF THE UNIVERSITY'S SCOPE/FEE POLICY? ___Yes
___No

ESTIMATED CONSTRUCTION BUDGET FROM FCPWeb: _____

PHASES INCLUDED ON PSA:

Program Definition	\$
Schematic Design	\$
Design Development	\$
Construction Documents	\$
Bid	\$
Construction	\$
On-site Observation	\$
Warranty	\$
Reimbursables	\$
Interiors	\$
Other	\$
Total	\$

Note: For CDB managed projects, the fees are negotiated by CDB at a later date.

Professional Services Approval (signature according to current delegated authority level)

BOT (via University Office of
Capital Programs and Real Estate Services)
 Senior Assoc. VP of Business & Finance

PM Initials: _____ BOT Date: _____

Signature/Date: _____

 Director of Campus Construction Unit

Signature/Date: _____

All professional services employment requiring QBS shall be reported as specified to the University Office of Capital Programs and Real Estate Services.

REQUIRED PROCUREMENT POSTING INFORMATION

PROJECT NAME

NOTICE OF CONTRACT FOR PROFESSIONAL SERVICES

Notice is hereby given of a professional services agreement between the Board of Trustees of the University of Illinois and **Professional Services Consultant's name, City, State** dated **date** for the **project name (Project #)** in the amount of \$.

NOTE:

To be submitted along with this form for posting to the Illinois Higher Education Procurement Bulletin:

- Certification and Statutory Requirements form
- Financial Disclosures and Conflict of Interest form
- Initial Evaluation Documentation
- Interview Evaluation Documentation
- COI determination from PPB (if applicable)
- Attachment C from PSA

Professional Service Consultants (PSC) Evaluation Process Overview

Summary

The University has a policy and process to help ensure that each Professional Services Consultant is evaluated during and/or at the end of each contract.

In addition, each evaluation should be made available to the PSC firm being evaluated who may provide a written response to the evaluation. *The evaluation and response shall not be made available to any other person or firm and is exempt from disclosure under the Freedom of Information Act.*

Process

1. Based on the type of contract, select the form(s) appropriate for the project type:
 - A. **Required** forms to be completed by policy and/or law:
 - 1). Standard contract: Construction Phase Evaluation at Substantial Completion. Standard contracts are those that use the PSA standard contract or PSA short form contract.
 - 2). Conceptualization contract: Conceptualization Phase (including feasibility and master plans) Evaluation at the completion of the contract.
 - 3). Retainer contract: Retainer Evaluation at the completion of the contract prior to possible renewal.
 - B. Optional forms to be completed as deemed necessary by the Project Manager:
 - 1). Standard contract: Design Phase Evaluation used at the end of SD, DD and/or CD.
 - 2). Standard contract: Pre Construction Phase Evaluation at the end of Bid and Award phase
 - 3). Standard contract: Post Construction Phase Evaluation used at the end of the warranty phase.
2. Based on size and complexity of the project, determine who will complete evaluations:
 - A. **Required** by policy:
 - 1). Project Manager. The Project Manager should determine if other project team members are needed to evaluate the PSC's performance. If others are requested to evaluate the PSC, the Project Manager should review those evaluations prior to completing his or her own. The Project Manager's evaluation will be sent to the PSC and should reflect the entire team's view of the project.
 - B. Optional – others who have had direct contact with the PSC or involvement in the design process as determined needed by the Project Manager, for example:
 - 1). Director.
 - 2). Plan reviewers/in-house professional staff.
 - 3). Client/future occupants of the facility.
 - 4). Planners.

3. Complete evaluation form either in Excel or print out and complete manually. The Excel form(s) will tabulate scores automatically. It is recommended that the form be filled out in Excel.
 - A. The quantitative measurements are numbers that are available in FCPWeb should be completed first. There are notes indicating where the values can be obtained within the evaluation form. The numbers should be obtained from these sources only to maintain consistency.
 - B. The quantitative measurements should be completed only by the Project Manager. These numbers should be filled in prior to sending the evaluations to other team member for completion.
4. Provide a copy of the completed evaluation form to the following:
 - A. Campus project file.
 - B. PSC firm being evaluated (*required* by statute).
 - 1). Only the evaluation form completed by the Project Manager should be sent to the PSC. The Project Manager should review and incorporate other team member evaluations into his or her evaluation.
 - 2). If the optional Design Evaluation form is being used, a meeting with the PSC would be an opportunity to review the evaluation and discuss performance issues. This could be helpful to improve the overall project.
 - C. PSC Evaluation Storage online. See the attached document for instructions on electronic file storage. Documents are stored electronically at UOCP&RES.
5. Complete the PSC Summary sheet located within the electronic file folder for each PSC firm, see attached document.
6. By statute, the PSC firm has an opportunity to provide a written response to the evaluation comments. If a response is received, a copy should be provided to:
 - A. Campus project file.
 - B. PSC Evaluation Storage online. The response from the PSC firm should be scanned and filed electronically. See the attached document for instructions on electronic file storage.
7. For each evaluation type, **the evaluation process shall be completed within 30 days of the end of the phase.** For example, the Pre-Construction phase evaluations shall be completed, filed and sent to the PSC being evaluated with 30 days of the project bid date.

**University of Illinois
PROFESSIONAL SERVICE CONSULTANTS (PSC) EVALUATION
CONSTRUCTION PHASE (Completed at the end of Substantial Completion)**

Project Name:		Date:	
Project Location:		UI Project #:	
Evaluator Name:		CDB Project #:	
		Firm Name:	
		Key Team	
		Members:	

QUANTITATIVE MEASUREMENTS:		
1	Original Total Construction Contract Amount:	
2	Number of Change Orders Issued:	
3	Total Dollar Value of Change Orders (CO):	
4	Percentage of CO to Total Contract Amount:	#DIV/0!
5	Total Dollar Value of CO's with justification code of PSC Error:	
6	Total Dollar Value of CO's with justification code of PSC Omissions:	
7	Policy Limit for total errors and omissions (1% of total original contract amount):	\$0
8	Policy limit for Omissions (30% of total omissions):	\$0
9	Total PSC Responsibility (negative number indicates none):	\$0

SCORING LEGEND:

(5) Excellent; (4) Good; (3) Satisfactory; (2) Less than Satisfactory; (1) Unacceptable; (0) Not applicable

QUALITATIVE MEASUREMENTS: ("To what level...")		Score
TECHNOLOGY (the impact of these items on construction):		
10	was a field investigation completed in a thorough fashion to minimize unknowns during construction?	
11	were the construction documents complete, coordinated with all disciplines and constructible? (quality of the documents)	
12	were the number of RFI's and Change Orders consistent with the project scope and complexity?	
13	did the document issued for construction clearly define the scope of work for each contractor/assigned subcontractor?	
CONSTRUCTION ADMINISTRATION/OBSERVATION:		
14	did the PSC provide a timely response to construction documentation, i.e. Requests for Information (RFI's), Request for Proposal/Change Orders (RFP's/CO's), etc.?	
15	did the PSC provide and accurately review construction documentation, i.e. Requests for Information (RFI's), Request for Proposal/Change Orders (RFP's/CO's), etc. prior to approval?	
16	did the PSC provide timely documentation of meetings and decisions?	
17	did the PSC complete submittal review in a timely manner?	
18	did the PSC review the contractor's pay requests and supporting documentation in a timely manner?	
19	did the PSC issue site inspection reports in the time frame established by contract?	
20	did the PSC work to resolve conflict in a timely manner?	
21	did the PSC provide a complete punch list?	
22	did the PSC follow-through with all closeout requirements for the project?	
PROJECT TEAM:		
23	did the PSC use the same personnel on the project that were submitted on the 255 form? If not, was the change communicated to and accepted by the Owner and beneficial to the project?	
24	did the PSC and consultants communicate and coordinate with the contractors?	
25	did the PSC and consultants communicate and coordinate with each other?	
26	did the PSC communicate effectively with the Owner?	

#14a

TOTAL SCORE:	0
AVERAGE SCORE:	0.0

27	COMMENTS: (Required for scores of less than 3)
RECOMMENDATIONS:	
28	Would you recommend contracting with this PSC for future projects?
(Y) Yes; (N) No; (C) Conditional, would use PSC again but with limitations listed below	
29	LIMITATIONS:

**University of Illinois
PROFESSIONAL SERVICE CONSULTANTS (PSC) EVALUATION
CONCEPTUALIZATION (Feasibility, Master Plans, etc.) PHASE**

Project Name:
Project Location:
Evaluator Name:

Date:
UI Project #:
CDB Project #:
Firm Name:
Key Team Members:

QUANTITATIVE MEASUREMENTS:		
1	Completion date per PSA Attachment C or as amended:	
2	Actual completion date:	
3	Schedule Variance (Planned minus Actual in days)	0
SCORING LEGEND:		
(5) Excellent; (4) Good; (3) Satisfactory; (2) Less than Satisfactory; (1) Unacceptable; (0) Not applicable		
QUALITATIVE MEASUREMENTS: ("To what level...")		Score
4	did the PSC develop a detailed program that identified spaces, primary users, required adjacencies, site requirements, etc.?	
5	did the PSC identify special requirements related to code, historical issues, site constraints, environmental issues, etc.?	
6	was a field investigation completed in a thorough fashion?	
7	was the existing building and systems analyzed with regards to reuse?	
8	did the aesthetics of the design concepts meet the program requirements and Owner expectations?	
9	did the functionality of the design concepts meet the program requirements and Owner expectations?	
10	did the PSC propose concepts for site and building that met University design guidelines?	
11	did the PSC propose concepts for site and building that agreed with the campus master plan?	
12	did the PSC communicate effectively with the Owner?	
TOTAL SCORE:		0
AVERAGE SCORE:		0.0
13 COMMENTS: (Required for scores of less than 3)		
RECOMMENDATIONS:		
14	Would you recommend contracting with this PSC for future projects? (Y) Yes; (N) No; (C) Conditional, would use PSC again but with limitations listed below	
15 LIMITATIONS:		

**University of Illinois
PROFESSIONAL SERVICE CONSULTANTS (PSC) EVALUATION
RETAINER CONTRACT
(Completed at the end of the retainer contract)**

Project Name:
Project Location:

Evaluator Name:

Date:
UI Project #:
CDB Project #:

Firm Name:
Key Team Members

SCORING LEGEND:

(5) Excellent; (4) Good; (3) Satisfactory; (2) Less than Satisfactory; (1) Unacceptable; (0) Not applicable

QUALITATIVE MEASUREMENTS: ("To what level...")		Score
DESIGN/TECHNOLOGY:		
1	were all applicable codes and UI guidelines typically followed?	
2	were field investigations typically completed in a thorough fashion to minimize unknowns during construction?	
3	were comments and revisions from the University typically incorporated into the design in a timely manner?	
4	did the constructed project aesthetics typically meet the expectations of the University and client group?	
5	did the constructed project functionality typically meet the expectations of the University and client group?	
6	were the construction documents typically complete, coordinated with all disciplines and constructible? (quality of the documents)	
7	were the number of Addenda, RFI's and Change Orders typically consistent with the project scope and complexity?	
SCHEDULE/BUDGET:		
8	were the scheduled due dates typically met by the PSC?	
9	did the PSC issue timely construction documentation, i.e., Addenda, response to Requests for Information (RFI's), Request for Proposal/Change Orders (RFP's/CO's), etc.?	
10	did the PSC verify that the projects were being constructed to meet the construction documents and provide feedback on any deviations?	
11	did the PSC work to resolve conflict in a timely manner?	
12	did the PSC follow-through with all closeout requirements for the projects?	
PROJECT TEAM:		
13	did the PSC use the same personnel and consultants on the projects that were submitted on the 255 form? If not, was the change communicated to the Owner and beneficial to the project?	
14	did the PSC and consultants communicate and coordinate with the each other?	
15	did the PSC and consultants communicate and coordinate with the contractors?	
16	did the PSC communicate effectively with the Owner?	
17	when questions or problems were encountered, did the PSC respond proactively?	
TOTAL SCORE:		0
AVERAGE SCORE:		0.0

18	COMMENTS: (Required for scores of less than 3)
RECOMMENDATIONS:	
19	Would you recommend contracting with this PSC for future projects?
(Y) Yes; (N) No; (C) Conditional, would use PSC again but with limitations listed below:	
20	LIMITATIONS:

Summary of PSC Evaluations

PSC Name:

PSC Location:

Print Date: 7/17/2017 15:02

Phase/Contract Type	Average Score*
Pre-Construction	0.0
Construction	0.0
Conceptualization	0.0
Retainer	0.0
Schematic Design	0.0
Design Development	0.0
Construction Documents	0.0
Post Construction	0.0
Total Average	0.0

* Scoring system of 1 to 5 with 5 being the highest score available.

(5) Excellent; (4) Good; (3) Satisfactory; (2) Less than Satisfactory; (1) Unacceptable; (0) Not applicable

University of Illinois
PROFESSIONAL SERVICE CONSULTANTS (PSC) EVALUATION
PRECONSTRUCTION PHASE (Completed at the end of Bidding and Award Phase) (optional)

Project Name:		Date:	
Project Location:		UI Project #:	
Evaluator Name:		CDB Project #:	
		Firm Name:	
		Key Team Members:	

QUANTITATIVE MEASUREMENTS:		
1	Issue for Bid date per PSA Attachment C or as amended:	
2	Actual Issue for Bid date:	
3	Schedule Variance (Planned minus Actual in days)	0
4	Budget for Construction:	
5	Final PSC Construction Cost Estimate (Base Bid):	
6	Budget Cost Variance (Budget minus PSC Cost Estimate):	\$0
7	Final PSC Construction Cost Estimate (Base Bid + Accepted Alternates):	
8	Construction Award Amount:	
9	Cost Variance (PSC Cost Estimate minus Actual):	\$0
SCORING LEGEND: (5) Excellent; (4) Good; (3) Satisfactory; (2) Less than Satisfactory; (1) Unacceptable; (0) Not applicable		
QUALITATIVE MEASUREMENTS: ("To what level...")		
DESIGN/TECHNOLOGY:		
10	did the aesthetics of the design meet the program requirements provided by the University?	
11	did the functionality of the design meet the program requirements provided by the University?	
12	did the PSC complete the documentation required for sustainable/energy efficient design accurately? (i.e. energy analysis, LEED documentation)	
13	were all applicable laws and code requirements incorporated into the design?	
14	was a field investigation completed in a thorough fashion to minimize unknowns during design?	
15	were the University standards and guidelines followed?	
16	were comments and revisions from the University incorporated into the design?	
17	were the design submittals complete?	
SCHEDULE:		
18	did the design submittals meet the scheduled due dates in PSA Attachment C or as amended?	
19	did the PSC issue required addenda in a timely manner?	
PROJECT TEAM:		
20	did the PSC use the same key personnel on the project that were submitted on the 255 form? If not, was the change communicated to and accepted by the Owner and beneficial to the project?	
21	did the PSC and consultants communicate and coordinate effectively?	
22	did the PSC communicate effectively with the Owner?	
23	when questions or problems were encountered, did the PSC respond proactively?	
TOTAL SCORE:		0
AVERAGE SCORE:		0.0

24	COMMENTS: (Required for scores of less than 3)	
25	Would you recommend contracting with this PSC for future projects?	Y
(Y) Yes; (N) No; (C) Conditional, would use PSC again but with limitations listed below:		
26	LIMITATIONS:	

**University of Illinois
PROFESSIONAL SERVICE CONSULTANTS (PSC) EVALUATION
DESIGN PHASE (OPTIONAL)
(Completed at the end of Phase Indicated)**

Project Name:		Date:	
Project Location:		UI Project #:	
Evaluator Name:		CDB Project #:	
		Firm Name:	
		Team Members:	

QUANTITATIVE MEASUREMENTS:			
1	Issue for SD Review date per PSA Attachment C or as amended:		
2	Actual Issue for SD Review date:		
3	SD Schedule Variance (Planned minus Actual in days)		0
4	SD PSC Cost Estimate:		
5	Owner Budget for Construction:		
6	SD Cost Variance (Budget minus PSC Estimate):		\$0
7	Issue for DD Review date per PSA Attachment C or as amended:		
8	Actual Issue for DD Review date:		
9	DD Schedule Variance (Planned minus Actual in days)		0
10	DD PSC Cost Estimate:		
11	Owner Budget for Construction:		
12	DD Cost Variance (Budget minus PSC Estimate):		\$0
13	Issue for 95% CD Review date per PSA Attachment C or as amended:		
14	Actual Issue for 95% CD Review date:		
15	CD Schedule Variance (Planned minus Actual in days)		0
16	CD PSC Cost Estimate:		
17	Owner Budget for Construction:		
18	CD Cost Variance (Budget minus PSC Estimate):		\$0
SCORING LEGEND:			
(5) Excellent; (4) Good; (3) Satisfactory; (2) Less than Satisfactory; (1) Unacceptable; (0) Not applicable			
QUALITATIVE MEASUREMENTS: ("To what level...")		Score	
DESIGN/TECHNOLOGY:		SD	DD
19	did the aesthetics of the design meet the program requirements provided by the University?		
20	did the functionality of the design meet the program requirements provided by the University?		
21	did the PSC complete the documentation required for sustainable/energy efficient design accurately? (i.e. energy analysis, LEED documentation)		
22	were all applicable laws and code requirements incorporated into the design?		
23	was a field investigation completed in a thorough fashion to minimize unknowns during design?		
24	were the University standards and guidelines followed?		
25	were comments and revisions from the University incorporated into the design?		
26	were the design submittals complete?		

SCHEDULE/BUDGET:				
27	did the design submittals meet the scheduled due dates in PSA Attachment C or as amended?			
28	were the PSC cost estimates aligned with the available budget?			
29	did the PSC issue required addenda in a timely manner?			
PROJECT TEAM:				
30	did the PSC use the same key personnel on the project that were submitted on the 255 form? If not, was the change communicated to and accepted by the Owner and beneficial to the project?			
31	did the PSC and consultants communicate and coordinate effectively?			
32	did the PSC communicate effectively with the Owner?			
TOTAL SCORE:		0	0	0
AVERAGE SCORE:		0.0	0.0	0.0
33 COMMENTS: (Required for scores of less than 3)				
34	Would you recommend contracting with this PSC for future projects? (Y) Yes; (N) No; (C) Conditional, would use PSC again but with limitations listed below			
35 LIMITATIONS:				

**University of Illinois
PROFESSIONAL SERVICE CONSULTANTS (PSC) EVALUATION
POST CONSTRUCTION PHASE (Optional)**

Project Name:
Project Location:

Evaluator Name:

Date:
UI Project #:
CDB Project #:
Firm Name:
Key Team Members:

SCORING LEGEND:

(5) Excellent; (4) Good; (3) Satisfactory; (2) Less than Satisfactory; (1) Unacceptable; (0) Not applicable

QUALITATIVE MEASUREMENTS: ("To what level...")		Score
1	did the PSC help resolve problems during the post construction phase in a timely manner?	
2	did the PSC verify completion of punch list items by Contractors?	
3	did the PSC complete documentation as required in PSA for warranty issues in a timely manner?	
4	did the PSC communicate effectively with the Owner?	
5	did the PSC communicate effectively with the Contractor?	
TOTAL SCORE:		0
AVERAGE SCORE:		0.0
6 COMMENTS: (Required for scores of less than 3)		
RECOMMENDATIONS:		
7	Would you recommend contracting with this PSC for future projects? (Y) Yes; (N) No; (C) Conditional, would use PSC again but with limitations listed below:	
8 LIMITATIONS:		

PSC Evaluations – Electronic Storage Process

1. Initial set-up of the PSC Evaluations Storage (by AITS/UOCP&RES):
 - a. The individual file folders for the current PSCs with contracts (2007/2008) will be created and filed alphabetically.
 - b. Each PSC file folder will include an Excel summary sheet to tally the evaluation average score.
 - c. Each PSC file folder will include this document with instructions to create and file evaluations.
 - d. There will be a master file folder, X-MasterFolder, with blank Excel Summary file and a ReadMe file for reference.
2. Completed PSC Evaluations (by Campus Units):
 - a. Print or save the completed evaluation to pdf format. The naming convention is [ProjectNumber]-[#].pdf. The # will start at 1 and increase as additional evaluations or responses are added to the folder.
 - b. If printed, the evaluation will need to be scanned to create an electronic version.
 - c. “File” the pdf or scanned evaluation in the appropriate PSC folder.
 - d. Input the evaluation data into the PSC summary sheet. The totals will calculate automatically.
3. Responses from PSC firms.
 - a. If a response from the PSC is received, the original is filed in the project file and a copy is scanned and filed electronically with the evaluations for that project. The file naming convention is [ProjectNumber]-[#]R.pdf. The number should match the evaluation that the PSC is responding to and the R is to indicate that this is a response from the PSC.
4. Set-up for new PSC Files (by Campus Units):
 - a. Create a copy of the master file folder, X-MasterFolder.
 - b. Paste the folder into the correct alphabetical directory (A-D, E-I, J-R, S-Z).
 - c. Rename the copy of the master file with the PSC Company Name.
 - d. Rename the copy of the Excel file with the PSC Company Name. The naming convention is [PSCcompanyname]Summary.xls.
 - e. Open the Excel file and input the PSC name and location (city and state).

PSC EVALUATIONS FILE STORAGE STRUCTURE

