

Engineering Building Expansion Feasibility Study

Solicitation #1504

Request for Qualifications
for OUS Retainer Consultants Only
Architectural Services



Portland State
UNIVERSITY

August 14, 2013

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SECTION 1 - ADMINISTRATIVE INFORMATION

1.1 INTRODUCTION

Portland State University (PSU) is located in downtown Portland and is part of the public Oregon University System. Nearly 29,000 students (20,226 FTE) attended classes at PSU in the fall of 2012, supported by approximately 4,250 faculty and staff.

The Maseeh College of Engineering and Computer Science is the primary resource for engineering education in the Portland area. Approximately 2,100 students are enrolled in the Maseeh College. The Engineering Building is comprised of a five-story, 130,000 square foot building housing classrooms, over 50 teaching and research labs, a 120 seat auditorium, and office space. Built above an existing underground parking garage, the tower connects to the adjacent Fourth Avenue Building. The building was completed in 2006.

The Engineering Building is USGBC LEED NC Gold Certified. Spatial organization, passive design strategies and interior environmental qualities are to be incorporated into the planning that supports concepts feasible of further development as USGBC LEED EB/CI Gold Certified.

PSU is seeking architectural services to examine the feasibility of expanding the Level 1 atrium to the west and to the north to create better and more functional mingling space, event space, collaboration rooms, and innovation space.

Selected firms having Retainer Contracts with the Oregon University System, known as “Applicants” or “Proposers”, with experience in providing these services are invited to submit proposals for providing Architectural Services. The process will be as specified by **Oregon Administrative Rules 580-063-0020 (2) and 580-063-0025 (b)** *Informal Procurement for Contracts for Professional Consultants*.

This Request for Qualifications (“RFQ”) shall not commit the OSBHE or PSU to enter into any agreement, to pay any expenses incurred in preparation of any response to this RFQ, or to procure or contract for any supplies, goods or services. The OSBHE reserves the right without liability to OSBHE or PSU, to cancel this RFQ and to reject any proposal that does not comply with this RFQ or applicable administrative rules, and to reject any and all responses received as a result of this RFQ upon a finding that it is in the public interest to do so.

A sample copy of the Oregon University System’s Retainer Contract Supplement Pursuant to Retainer Contract for Professional Consulting Services is attached to this RFQ (Appendix 4.01). PSU will enter into negotiations with the selected firm and, if the negotiations are successful, will enter into a Retainer Contract Supplement substantially similar to the attached. If the negotiations are not successful, PSU reserves the right to enter into negotiations with the next highest scoring firm from among the remaining Proposers.

1.2 SCOPE OF WORK

At minimum, the scope of services are to include a kick-off meeting, review of existing conditions, needs assessment, conceptual design studies, conceptual estimate, renderings, refinement of a preferred recommendation, laying of ground work with City on potential changes and design review process, investigation of revised and/or supplemental retail opportunities, and submittal of the final study. The final study will need to address fire and smoke controls, and the incorporation of departmental atrium

displays (drop tower, barometer, on-going research, etc.), and, the coordination with PSU Campus Planning to address existing and future retail implications.

No billable work can proceed prior to negotiation and execution of the OUS Retainer Contract Supplement and the Consultants receipt of a Notice to Proceed.

1.2.1 Kick-Off Meeting

Following release of the Notice to Proceed, a project kick-off meeting is to be held. The agenda for the meeting will be to review the contract administration requires, confirm the scope of work, establish an approved meeting schedule and address or topics related to the project delivery process.

1.2.2 Review of Existing Conditions

A review of existing conditions is minimally expected to include touring the current Engineering Building, adjacent PSU spaces and building common circulation areas. The design team is to collect, analyze and integrate other university data into the current conditions assessment as applicable. The review of existing conditions may generate the need for the design team to collect further information for design synthesis.

1.2.3 Needs Assessment

Establish spatial programming criteria for the existing and new program elements. Provide a rational methodology and determine the area requirements for the existing and new program spaces. Explore opportunities to improve current spatial efficiency while integrating additional program elements. Develop adjacency diagrams that appropriately reflect the functional relationships. Provide a complete programmatic inventory of required spaces. PSU is to approve the required adjacencies and program prior to beginning conceptual design.

1.2.4 Conceptual Design Studies

Prepare and present design concepts for achieving the established program. The alternative design concepts should at a minimum explore options for expansion to the north and to the west at level 1 atrium. They should identify potential changes to the existing atrium to efficiently use space and provide appropriate adjacencies. The studies should allow PSU to test potential program element combinations and layouts. The studies are to present alternative plans for accommodating new and expanded program elements including: collaboration rooms, event space, mingling space, and innovation space. Meet with department heads to discuss the incorporation of departmental atrium displays (drop tower, barometer, on-going research, etc.). Coordinate with PSU Campus Planning to address existing and future retail implications. Initiate conversations with the City of Portland to address Design Review considerations regarding the expansion. With PSU input, develop a matrix of pro's and con's and a range of magnitude cost associated with each design concept.

1.2.5 Refinement of Preferred Recommendation/Conceptual Estimate/Renderings

Based on feedback from PSU on the design concepts, develop a preferred recommendation. The design concept preferred by PSU and recommended may be one alternative design concepts or a new design concept merging elements from the previous conceptual design studies. It should include a plan that clearly details recommended spatial changes in the existing Engineering Building and areas of expansion. In collaboration with PSU, provide a conceptual level estimate of probable cost for the preferred design concept. Provide high resolution renderings of the preferred

recommended design concept from at least two (2) exterior view points and two (2) interior view points.

The report is not expected to include design development, construction documents, or detailed construction estimating.

1.2.6 Submittal of the Final Study

The final Space Planning and Feasibility Study document is to clearly articulate, the participants, purpose, process, methodologies and recommendation. Include in the body of the report or appendices, team meeting summaries, plans and data of current conditions, code information, established programming criteria and needs, spatial program, evaluated design studies and the preferred plan recommendation and cost estimate.

Distribute one (1) Portable Document Format (pdf) electronic copy of the full final accepted study to, along with clear JPEG formatted files of all photographs, illustrations and images incorporated into the study. Provide five (5) 8 ½" x 11" bound copies of the final study accepted by PSU along with all project close-out documentation required under the Agreement.

1.3 SELECTION PROCEDURE AND ANTICIPATED TIMETABLE

The selection procedure is intended to evaluate the capabilities of interested Applicant teams to provide professional services to PSU for this project. The Selection Committee will numerically evaluate the responses to the RFQ. On the basis of this evaluation, the highest scoring firms may be selected for final consideration through Interviews and further investigation of references.

Following the scoring and selection process, PSU anticipates issuing a notice of intent to award to the apparently successful Applicant, and will negotiate a final contract including a finalized project schedule and not to exceed fee budgeted at \$40,000 for the proposed scope of services. PSU reserves the right to reject all qualifications.

Attendance at the Mandatory Pre-Proposal Conference is required to propose on this Project. This Conference will be conducted at the time and location specified in Section 1.3. Attendance will be documented through a sign-in sheet prepared by the OUS representative. Proposers who arrive more than 10 minutes after start of time of the meeting (as stated in the solicitation and by the OUS representative's watch) or after the discussion portion of the meeting (whichever comes first) shall not be permitted to sign in and will not be permitted to submit a bid on the Project. **Note that Parking at PSU can be difficult to find. Please plan accordingly.**

RFQ schedule is as follows:

- August 14, 2013Advertisement of Request for Qualifications
August 22, 2013 @ 10:00 AM local time.....Mandatory pre-proposal conference
Meet at the University Services Building located at 617 SW Montgomery Street, Suite 202, Portland, OR 97201
**Note: Parking is difficult to find at PSU. Please schedule your time accordingly.
August 26, 2013 @ 5:00 PM local timeApplicant questions due, solicitation protest deadline
August 28, 2013Final addendum published if necessary
September 5, 2013 @ 5:00 PM local time.....Qualifications Due
**Note delivery address in Section 1.4

The following are proposed timelines and are subject to change without notice:

- September 12, 2013.....Notice of Intent to Award or notification of the most qualified applicants, and assignment of interview appointments
September 18, 2013.....Finalist interviews if needed (please hold these dates as finalists will be assigned a time on one of these days.)
September 18, 2013.....Notice of Intent to Award issued to apparent successful applicant
September 25, 2013Selection protest period ends

Schedule Milestones

- October 1, 2013Contract Execution
October 3, 2013Project Kick-off Meeting
November 15, 2013Project Completion

1.4 RESPONSE

To be considered for selection, written qualifications must arrive at Portland State University, Contracting and Procurement Services by the date specified in Section 1.3. Delivery is recommended. Applicants who mail packages should allow ample delivery time to ensure timely arrival. The address is:

FOR DELIVERY:

Portland State University
Contracting and Procurement Services
Attn: Cate Antisdell
EB Expansion Feasibility Study RFQ
1600 SW Fourth Avenue, Suite 260
Portland OR 97201

FOR MAIL: (Not Recommended)

Portland State University
Contracting and Procurement Services
Attn: Cate Antisdell
EB Expansion Feasibility Study RFQ
PO Box 751, Mail Stop: FAST-CAPS
Portland OR 97207-0751

Late Qualifications will be returned unopened.

**Qualifications will not be accepted at any other PSU location other than the address specified above.
FAXED OR EMAILED QUALIFICATIONS WILL NOT BE ACCEPTED**

Applicants selected may be requested to provide additional information, either informally or via the interview process, to clarify their qualifications and to ensure mutual understanding of the scope of the work requirements and schedule.

1.5 RESERVED

1.6 INSURANCE & LICENSING REQUIREMENTS

1.6.1 Insurance Provisions

During the term of the Agreement, Architect shall maintain in full force, at its own expense, from companies licensed to do business in Oregon, insurances as noted below:

A. Workers Compensation - Architect, its consultants, if any and all employers working under the Agreement and supplements hereto are subject employers under the Oregon Workers' Compensation Law and shall comply with ORS 656.017, which requires subject employers to provide Oregon workers' compensation coverage for all their subject workers.

B. Commercial General Liability - Architect shall secure Commercial General Liability insurance with a combined single limit of not less than \$1,000,000 each occurrence for bodily injury and property damage. It shall include personal injury coverage and contractual liability coverage for the indemnity provided under the Agreement.

C. Automobile Liability - Architect shall secure Automobile Liability insurance with a combined single limit of not less than \$1,000,000 each occurrence for bodily injury and property damage, including coverage for owned, hired, or non-owned vehicles, as applicable. This coverage may be written in combination with the Commercial General Liability Insurance.

D. Professional Liability - Architect may be required, under the terms of the Agreement or any supplement hereto, to provide the Owner with proof of coverage for Professional Liability insurance covering any damages caused by the negligent error, omission, or any acts for the project, its drawings and project manual, and all related work products of Architect if it is determined that such coverage, in the estimation of the Owner, is needed. The policy may be either a practice based policy or a policy pertaining to the specific project. Professional Liability insurance to be provided shall have a combined single limit of not less than \$1,000,000; a higher limit may be required by the Owner.

If any of the required liability insurance is arranged on a "claims made" basis, "tail" coverage will be required at the completion of the agreement for a duration of 24 months or the maximum time period the insurer will provide such if less than 24 months.

Architect will be responsible for furnishing certification of "tail" coverage as described or continuous "claims made" liability coverage for 24 months following completion. Continuous "claims made" coverage will be acceptable in lieu of "tail" coverage, provided its retroactive date is on or before the effective date of the Agreement. This will be a condition of the Final Acceptance of Work or Services and Related Warranty, if any.

Prior to the signature by the Owner to a supplement under the Retainer Agreement, Architect shall furnish to the Owner, Certificates of Insurance as evidence of the insurance coverages required under the Agreement. The certificate(s) shall provide that the insurance company or companies shall give a 30 calendar day notice (without reservation) to OWNER if the insurance is canceled or changed. The certificate(s) should state specifically that the insurance is provided for the Agreement or Amendments hereto.

The Certificates of Insurance, except for Workers' Compensation and Professional Liability, shall provide that the Owner, and its institutions, officers and employees are Additional Insureds with respect to the Architect's services to be provided under the Agreement.

1.6.2 Professional Registration

The Architect and all firms providing professional architectural services shall be currently licensed to practice in each firm's area of professional expertise in the State of Oregon, and shall comply with all State of Oregon Architect and Professional Engineer licensure requirements.

1.7 ADDENDA

Although PSU encourages an open proposal process, prospective proposers need to be aware that the RFQ will be modified only by documents issued as addenda by PSU. No other direction or comments received by proposers, written or oral, will serve to change the RFQ.

1.8 QUESTIONS FROM APPLICANTS

Questions and requests for clarifications or changes from applicants regarding this RFQ must be received in writing via email no later than the date specified in Section 1.3 and shall be directed to the Contracting and Procurement Services department at: proposals@pdx.edu.

All questions and requests that are timely received will be answered via addenda to the RFQ. Other information and responses, written or oral, which are not contained in official written addenda to the RFQ from PSU or any other source are not binding on PSU. The final addenda, if any, will be released no later than the date specified in Section 1.3. Applicants are encouraged to call to check on the status of such addenda prior to submission of their Written Qualifications.

1.9 PROTESTS

1.9.1 Solicitation Protests

Prospective respondents may submit a request for change of particular solicitation provisions and specifications and conditions (including comments on any specifications that a firm believes limits competition) to Contracting and Procurement Services by delivery or mail to the address indicated in Section 1.4.

These must be received prior to the date specified in Section 1.3. Such requests for change shall include the reasons for the request and any proposed changes to the solicitation provisions and specifications and conditions.

1.9.2 Selection Protests

Any Applicant who responds to the RFQ and claims to have been adversely affected or aggrieved by the selection of competing Applicants shall have the opportunity to submit a written protest to:

FOR DELIVERY:

Portland State University
Contracting and Procurement Services
Attn: Darin Matthews
PROTEST - EB Expansion Feasibility RFQ
1600 SW Fourth Avenue, Suite 260
Portland OR 77201

FOR MAIL: (Not Recommended)

Portland State University
Contracting and Procurement Services
Attn: Darin Matthews
PROTEST - EB Expansion Feasibility RFQ
PO Box 751, Mail Stop: FAST-CAPS
Portland OR 97207-0751

The written protest must be received by the date specified in Section 1.3. All protests will be answered directly with the Applicant.

1.10 INCURRED COSTS

Portland State University is not liable for any costs incurred by the design team in the preparation or presentation of their qualifications.

No billable work can proceed prior to negotiation and execution of the OUS Retainer Contract Supplement and the Consultants receipt of a Notice to Proceed.

1.11 EQUAL EMPLOYMENT COMPLIANCE REQUIREMENT; SEXUAL HARASSMENT

By submitting a qualifications package, the applicant certifies conformance to the applicable federal, state and local laws, acts, executive orders, statutes, administrative rules, regulations, ordinance and related court rulings concerning Affirmative Action toward Equal Employment Opportunities. All information and reports required by the Federal or Oregon State or local Governments, having responsibility for the enforcement of the foregoing, shall be supplied to PSU upon request for purposes of investigation to ascertain compliance with the foregoing.

Pursuant to OAR 580-061-0030, by submitting qualifications, the applicant certifies that they have not discriminated against Minority, Women or Emerging Small Business Enterprises in obtaining any required subcontracts.

Pursuant to OAR 580-061-0040, applicants are hereby notified that the OSBHE has adopted policies applicable to consultants and contractors that prohibit sexual harassment and that applicants and their employees are required to adhere to PSU's policy prohibiting sexual harassment in their interactions with members of PSU's community.

1.12 EQUITY AND DIVERSITY

PSU is committed to ensuring equity and diversity in its procurement and contracting process and increasing opportunities for Minority, Women and Emerging Small Businesses (MWESB). Therefore, PSU strongly encourages its consultants and contractors to utilize MWESB firms in providing services and materials for PSU contracts and projects.

1.13 PUBLIC RECORDS

PSU will keep this RFQ and one copy of each original qualifications received in response to it, together with copies of all documents pertaining to the award of any contract, as part of the file or record that is

open to public inspection. If qualifications contain any information that constitutes a trade secret under ORS 192.501(2), each sheet containing a trade secret must be marked with the following legend:

“This data constitutes a trade secret under ORS 192.501(2), and shall not be disclosed except in accordance with the Oregon Public Records Law, ORS Chapter 192.”

The Oregon Public Records Law exempts from disclosure only bona fide trade secrets, and the exemption from disclosure applies only “unless the public interest requires disclosure in the particular instance.” ORS 192.501. Therefore, non-disclosure of documents or any portion of a document submitted as part of qualifications may depend upon official or judicial determinations made pursuant to the Public Records Law. These restrictions may not include cost or price information.

END OF SECTION 1

SECTION 2 - QUALIFICATIONS REQUIREMENTS

2.1 QUALIFICATIONS SUBMISSION

Submit one (1) CD containing a Portable Document Format (pdf) electronic copy of the written qualifications as well as five (5) paper copies of the qualifications, containing the following items and providing the information as specified. Please respond to the requested information using the following same numbers and order in which the information is requested. Incomplete qualifications may not be considered.

Written qualifications are not to exceed eight (8) double-sided 8 ½"x11" pages in length for a total of 16 pages. Up to three (3) ledger size 11"x17" pages may be used to convey Schedule, Approach and Methodology. Each side of an 11"x17" page counts as two (2) pages. Page count includes *all* sheets submitted except for a blank page. If proposal exceeds the page limit, only the allowed number of pages will be considered starting with the first page. For sustainability reasons, please submit your response in loose leaf, single, unbound sets printed on recycled paper. **Please do not use ring binders, dividers, wire spiral bindings or plastic covers.**

2.2 EVALUATION CRITERIA

2.2.1 Design Team - 15 Points

List the makeup of your design team, including the names and addresses of consulting design and support firms.

Describe each team member that will work on the project including their role, responsibilities, years with the firm, and a list of similar projects they have worked on and their experience with similar projects.

Indicate who in your team will be the primary contact person for the Owner.

The Selection Committee will be looking for the experience level and background of the team members that will work on the project and the degree to which their previous experience demonstrates the ability to provide the services in a professional and timely manner.

2.2.2 Previous Related Experience - 25 Points

Provide descriptions of no more than three (3) similar recent studies, which have been completed by the team, include at least one (1) study that the consulting design and support firms were part of the team.

Clearly demonstrate the experience of the team in the collaboration spaces and atrium space or directly related facilities.

Demonstrate the experience of the team in working with challenging egress and smoke control issues and working with the City of Portland to resolve complex issues.

The Selection Committee will be looking for the experience level of the team members working together with clients to successfully deliver feasible design solutions.

2.2.3 Approach/Methodologies - 25 Points

Describe your philosophy to Owner involvement in project delivery. Explain your approach and methodology for current condition assessment, needs analysis and synthesizing options into a concise, compelling and feasible project recommendation.

2.2.4 Schedule - 10 Points

Describe how your team will accomplish the Project within the Owners' **required milestones and completion schedule** as described in Section 1.3. Provide comments on the schedule and include any further details about your approach and methodologies.

2.2.5 Budget - 5 Points

There is an initial budget of \$40,000 for this scope of work. Explain the techniques your team will use to manage the budget and control costs. Labor rates and reimbursable costs will be in accordance with the Oregon State University retainer agreement and Section 5 Compensation of the sample agreement.

2.2.6 Equity and Diversity - 10 Points

PSU is committed to increasing contract opportunities for Minority, Women and Emerging Small Businesses (MWESB). PSU is seeking qualified firms that demonstrate a commitment to diversity in the workforce and in its contracting practices.

Include a Management Plan for the project as follows: Include your firms plan to increase the diversity of a business' workforce and to subcontract with or purchase from MWESB firms or businesses that have been historically underrepresented on public contracts. The Management Plan should also include your firms' nondiscrimination practices, subcontracting strategy, workforce diversity plan, and outreach plan to increase participation by MWESB firms. The Management Plan, except for any percentage goals to utilize MWESB firms, shall become part of the agreement.

Identify by name any MWESB sub-contractors, partners, or suppliers that you will utilize on this project team. Please include their specific role on the project. Substitutions of these subcontractors or suppliers after award of the bid shall require PSU approval.

Provide examples of your firms past performance in regards to workforce diversity and subcontracting plans. Please include number and dollar amount of sub-contracts awarded, and any utilization percentages or other performance indicators.

2.2.7 Qualifications Completeness And Quality - 5 Points

Scoring will be based on overall quality of the qualifications, completeness and compliance with the requirements of the RFQ.

2.2.8 Reference Check - 5 Points

Provide three (3) clients for whom you (the Applicant) and each of the sub-consultants have provided similar services in the past five (5) years. These references should have had direct contact with the primary staff proposed on the project. References shall only be checked and scored for interviewed firms.

Provide a brief scope of work for each project. These may be the same projects named in Section 2.2.2. Provide the reference contact's name, relationship to the project, current phone number and e-mail address.

Information from references may be utilized for the evaluation of any of the above criteria. References shall only be checked and scored for interviewed firms.

2.2.9 Optional Team Interview - 50 Points

Optional team interviews may be conducted to allow the highest scoring Applicants to expand on each of the above categories.

In the event that team interviews are conducted, at a minimum, the Proposing Firm's primary contact person with the Owner and representative(s) from the any key Sub-consultant(s), should attend. The Proposing Firm's Interview Team shall consist of no more than five (5) total persons.

END OF SECTION 2

SECTION 3 - EVALUATION AND SELECTION PROCESS

3.1 SELECTION COMMITTEE

Qualifications will be evaluated by a Selection Committee that will consist of representatives from the PSU community and external representatives. Selection Committee members will not be announced prior to interviews, should they be held.

3.2 EVALUATION CRITERIA

Proposals will be evaluated by a qualified Selection Committee. Selection Committee members will not be announced prior to interviews.

The evaluation criteria and maximum allowable points to be used in the evaluation process are as stated in Section 2.2:

<u>Item</u>	<u>Criteria and Points</u>
2.2.1	Design Team - 15 Points
2.2.2	Equity and Diversity - 10 Points
2.2.3	Previous Related Experience - 25 Points
2.2.4	Approach/Methodologies - 25 Points
2.2.5	Schedule - 10 Points
2.2.6	Budget - 5 Points
2.2.7	Qualifications Completeness And Quality - 5 Points
Total available for written qualifications – 95 points	
2.2.8	Reference Check - 5 Points
2.2.9	Optional Team Interview - 50 Points
Total possible– 150 points	

3.3 SELECTION PROCESS

The qualifications package will be evaluated as follows:

- A. Review for inclusion of all elements specified in Section 2.2 EVALUATION CRITERIA. Any qualifications which do not include all required elements may be rejected as non-responsive at the Owner's sole discretion.
- B. Total preliminary point ratings will be assigned to the qualifications packages using the criteria specified in Section 2.2, items 2.2.1 to 2.2.7.
- C. At Owner's sole discretion the top Applicants submitting the qualifications packages receiving the highest point totals, may be invited to an interview with the Selection Committee. Should interviews occur, points will be assigned using the criteria specified in Section 2.2, items 2.2.9.
- D. At this point, references may be checked and scored for interviewed firms. Points will be assigned using the criteria specified in Section 2.2, item 2.2.8.
- E. A Notice of Intent to Award shall be issued to the proposer with the most cumulative total points (Section 2.2, items 2.2.1 through 2.2.9).

END OF SECTION 3

APPENDICES

4.1 SAMPLE OUS RETAINER CONTRACT SUPPLEMENT