

SUBJECT: Selection Process	Effective Date: 8/24/21	Procedure Number: FS 2016 FPC0020	
	Supersedes: FS 2011 FPC0001	Page 1	Of 7
	Responsible Authority: Sr. Director, Facilities Planning and Construction		

APPLICABILITY/ACCOUNTABILITY:

This Procedure applies to all F&S employees responsible for selecting Professional Services, Construction Management, General Contracting, Trade Services, and Design-Build Services for the university.

PROCEDURES:

A. Selection of Professionals, including Continuing Services

Pursuant to Board of Governors Regulation 14.005, Certification and Competitive Selection of Professionals, selection of Professionals will be made prior to Construction Management firms, unless the Selection Committee elects to select the Architect/Engineer and Construction Manager as a team.

The Selection Committee (“Committee”) will comprise:

- the Associate Vice President for Administration and Finance (Facilities and Safety) (AVP F&S) or designee;
- the Sr. Director of Facilities Planning and Construction or designee;
- one or two Managers, Project Managers, or other subject matter experts in Facilities and Safety (Utilities and Energy Services, Facilities Operations, Landscaping and Natural Resources, or Facilities Planning and Construction), appointed by the AVP F&S, based on the services to be performed;
- up to two client representatives, assigned as needed, depending on the project; and
- other university leadership approved by the AVP F&S, such as Board of Trustees members, Vice Presidents, etc.

The Committee may be expanded at the discretion of the AVP F&S, but will always be weighted to ensure that the majority of the members have demonstrable experience in the selection of professional services, or education in architecture, engineering, construction, or other related facilities disciplines.

The Committee will evaluate professional qualifications statements and proposals on the following criteria:

- the experience of personnel;
- past performance;
- ability to meet time and budget requirements;
- location;
- recent, current and projected workloads of the firms;
- project-specific criteria, as requested in the project advertisement or project fact sheet; and
- other relevant topics, as requested in the project advertisement or project fact sheet.

A scoring matrix with the above criteria will be developed for each Request for Proposal (RFP). The matrix may be modified based on specific requirements of the RFP, but must include the criteria listed above. Committee members will score each firm's proposal independently. After tabulation of the Committee's scores, the Committee will meet to discuss the professional qualifications statements, proposals, and scores. The combined rankings of the Committee members will determine the overall ranking of the firms, and the firms which will be invited to participate in follow-up discussions.

The Committee will conduct discussions with at least three (3) firms, unless fewer than three firms submitted, in which case, the Committee will conduct discussions with all firms. Discussions will consist of a formal presentation, followed by a Question and Answer session. The length of the presentation and Question and Answer session will be pre-determined by the Committee and sent to the firms at least five (5) business days prior to the discussions. The Committee may prepare an agenda for the presentations, or may choose not to. The Question and Answer session may comprise standard questions and questions which arise from each individual presentation. Individuals who may participate in the discussion sessions are limited to Committee members and the firms' proposed teams, unless others are agreed to by both parties prior to discussions. Discussions are preferred to take place at the F&S Building or at the firm's the local office, but may also be held virtually, as determined by the Committee.

F&S will determine the eligibility under Florida law of the invited firms to perform the required services.

Discussions are mandatory and will be scheduled by UCF with a minimum of five (5) days' notice. Discussions and may not be rescheduled by shortlisted firms, but may be rescheduled or canceled at UCF's discretion. Any firm that does not attend its discussion will be disqualified.

The Committee will evaluate the firms on their qualifications, approach to the project, and ability to provide the required services, and will rank the firms in the order of the most highly qualified to least qualified. Where possible, the Committee shall recommend to the president for approval

no less than three (3) firms, in the Committee's order of ranking. After approval by the president, all interviewed firms will be notified of the selected firm, and contract negotiations will begin.

B. Selection of Construction Management, General Contracting, and Trades, including Continuing Services

Pursuant to Board of Governors Regulation 14.0055, Certification and Competitive Selection for Construction Management Services and Design-Build Services, selection of Professionals will be made prior to selection of Construction Management firms, unless the Selection Committee elects to select the Architect/Engineer and Construction Manager as a team.

The Committee will comprise:

- the AVP F&S or designee;
- the Sr. Director of Facilities Planning and Construction or designee;
- one or two Managers, Project Managers, or other subject matter experts in Facilities and Safety (Utilities and Energy Services, Facilities Operations, Landscaping and Natural Resources, or Facilities Planning and Construction), appointed by the AVP F&S based on the services to be performed;
- up to two client representatives, assigned as needed, depending on the project; and
- other university leadership approved by the AVP F&S, such as Board of Trustees members, Vice Presidents, etc.

The Committee may be expanded at the discretion of the AVP F&S, but will always be weighted to ensure that the majority of the members have demonstrable experience in the selection of professional services, or education in architecture, engineering, construction, or other related facilities disciplines.

The Committee will evaluate proposals on the following criteria:

- the experience of personnel;
- past performance;
- ability to meet time and budget requirements;
- location;
- recent, current and projected workloads of the firms;
- project-specific criteria, as requested in the project advertisement or project fact sheet; and
- other relevant topics, as requested in the project fact sheet.

A scoring matrix with the above criteria will be developed for each Request for Proposal (RFP). The matrix may be modified based on specific requirements of the RFP, but must include the criteria listed above. Committee members will score each firm's proposal independently. After tabulation of the Committee's scores, the Committee will meet to discuss the construction

manager's qualification statements, proposals and scores. The combined rankings of the Committee members will determine the overall ranking of the firms, and which firms will be invited to participate in follow-up discussions.

The Committee will conduct discussions with at least three (3) firms, unless fewer than three firms submitted, in which case, the Committee will conduct discussions with all firms. Discussions will consist of a formal presentation, followed by a Question and Answer session. The length of the presentation and Question and Answer session to be pre-determined by the Committee and sent to the firms at least five (5) business days prior to the discussions. The Committee may prepare an agenda for the presentations, or may choose not to. The Question and Answer session may comprise standard questions and questions which arise from each individual presentation. Individuals who may participate in the discussion sessions are limited to Committee members, the firms' proposed teams, and the selected Architect/Engineer (who may act in an advisory capacity, at the Committee's discretion), unless others are agreed to by both parties prior to discussions. Discussions are preferred to take place at the F&S Building or at the firm's the local office, but may also be held virtually, as determined by the Committee.

F&S will determine the eligibility under Florida law of the invited firms to perform the required services.

Discussions are mandatory and will be scheduled by UCF with at least five (5) business days' notice. Discussions may not be rescheduled by shortlisted firms, but may be rescheduled or canceled at UCF's discretion. Any firm that does not attend its discussion will be disqualified.

The Committee will evaluate the firms on their qualifications, approach to the project, and ability to provide the required services, and will rank the firms in the order of the most highly qualified to least qualified. Where possible, the Committee shall recommend to the president for approval no less than three (3) firms, in the Committee's order of ranking. After approval by the president, all interviewed firms will be notified on the selected firm, and contract negotiations will begin.

C. Selection of Design-Build Services

Pursuant to Board of Governors Regulation 14.0055, Certification and Competitive Selection for Construction Management Services and Design-Build Services, the following procedure applies to selection:

The Committee will comprise:

- the AVP F&S or designee;
- the Sr. Director of Facilities Planning and Construction or his/her designee;

- one or two Managers, Project Managers, or other subject matter expert in F&S (Utilities and Energy Services, Facilities Operations, Landscaping and Natural Resources or Facilities Planning and Construction), appointed by the AVP F&S, based on the services to be performed; and
- up to two client representatives, assigned as needed, depending on the project.
- other university leadership approved by the AVP F&S, such as Board of Trustees members, Vice Presidents, etc.

The Committee may be expanded at the discretion of the AVP F&S, but will always be weighted to ensure that the majority of the members have demonstrable experience in the selection of professional services, or education in architecture, engineering, construction, or other related facilities disciplines.

Prior to advertising a project and requesting proposals, the Committee will determine the basis for selection, either qualifications-based or proposal-based.

1. For qualifications-based selections, the Committee will use the criteria and scoring matrix outlined in Section A for Professionals, and the criteria outlined in Section B for Construction Managers, and will follow the corresponding selection process.
2. For proposal-based selections, the Sr. Director of Facilities Planning and Construction and the Design Criteria Consultant will develop design criteria, which will be posted on the Facilities Planning and Construction website when the project is advertised. The Committee will request formal design-build proposals, consisting of two components:
 - a. An information booklet of up to 20 pages, showing bios of the proposed team members and their roles, services to be provided, related past performance information, approach to cost control and estimating, QA/QC, scheduling and on-time performance, safety, LEED, commissioning, MWBE/SDVOSB participation; and
 - b. A design-build proposal, not to exceed 80 pages (40 pages double-sided).

Firms may be instructed to submit their proposals in such a way as to maintain their anonymity. The proposals shall be reviewed by a Design Criteria Consultant, who shall provide the Committee with an evaluation of code, structure, engineered systems, life-cycle cost implications, and compliance with design criteria.

The Committee will score the proposals independently and rate each firm using the matrix, which may be modified by the Committee based on specific requirements of the RFP, but must include

elements listed in Sections A and B above. Proposals will be scored on said elements, the quality of the proposal and the Design Criteria Consultant's evaluation. Upon tabulation of the Committee's scores, the Committee and the Design Criteria Consultant will meet to discuss the results. The combined rankings of the Committee members the overall ranking of the firms and which firms will be invited to participate in follow-up discussions.

The Committee will conduct discussions with three (3) to six (6) firms, unless there are fewer than three firms submitting, in which case, the Committee will conduct discussions with all firms. Discussions will consist of a formal presentation and a one-hour Question and Answer session. The length of the presentation will be pre-determined by the Committee and sent to the firms at least five (5) business days prior to the discussions. The Committee may prepare an agenda for the presentations, or may choose not to. The Question and Answer session may comprise standard questions, proposal content questions, and questions which arise during discussions. Individuals who may participate in the discussion sessions are limited to Committee members, the Design Criteria Consultant and the firms' proposed teams. Discussions are preferred to take place at the F&S Building or at the firm's the local office, but may also be held virtually, as determined by the Committee.

F&S will determine the eligibility under Florida law of the invited firms to perform the required services.

Discussions are mandatory and will be scheduled by UCF with a minimum of five (5) business days' notice. Discussions and may not be rescheduled by shortlisted firms, but may be rescheduled or canceled at UCF's discretion. Any firm that does not attend its discussion will be disqualified.

The Committee will rank the firms in the order of most qualified to least qualified. Where possible, the Committee shall recommend to the president for approval no less than three (3) firms, in the Committee's order of ranking. After approval by the president, all interviewed firms will be notified of the selected firm, and contract negotiations will begin.

Approved by: Interim Associate Vice President, Duane Siemen, 8/24/21