

# SAMPLE REQUEST FOR STATEMENT OF QUALIFICATIONS

## PROJECT DESCRIPTION AND SCOPE OF WORK

The (Name of Agency) is soliciting proposals from qualified (Insert Type of Professional – Architects, Engineers, Landscape Architects, Land Surveyors and Construction Management) to provide (general statement of services and deliverables being requested) for the (project name or study).

(Insert a short project description including project type, estimated size and location (if known) and desired completion date, as well as the local government’s general goals for the facility or infrastructure’s performance. Provide enough information that consultant understands the scope and complexity of the project. The amount of information will vary depending on the size, type and complexity of the project and services being requested).

Types of professional services required are likely to include (Insert description of applicable services – for example, feasibility analysis, grant preparation, participation in public meetings, surveying, programming, schematic design, cost estimation, construction drawings, project oversight).

**Optional:** Funding sources for this project may include (Insert funding sources). The successful firm will be required to comply with (Insert requirements such as environmental regulations, firm’s public participation responsibilities, local government’s affirmative action policies, etc.). The (Local Agency) anticipates a total project cost of (Insert project cost, if known). (If the agency knows they will only have a finite amount of money for these services or for construction, it can help to share that).

## PROPOSAL CONTENT

The proposal must be organized in sections containing the following information:

- ▶ **Description of Firm.** Describe your firm’s legal structure, areas of expertise, length of time in business, number of employees, and other information that would help to characterize the firm. Provide the address of the main office (for legal purposes) and the address of the office that will manage the project, as well as the name and contact information of the Project Manager.
- ▶ **Experience.** Briefly describe other projects executed by your firm that demonstrate relevant experience. However, extensive descriptions of vaguely related projects are discouraged. For each project mentioned, include the name, address and phone number of a person who can be contacted regarding your performance on the project. When submitting projects for which your firm worked in an auxiliary capacity or in a joint venture or partnership, include the name of the lead firm.
- ▶ **Personnel.** Provide a professional resume for the key people proposed to be assigned to the project (including any important subconsultants) and describe relevant related experience. Describe key personnel’s proposed roles and responsibilities on this project. Submittals must identify a proposed project manager who would be responsible for the day-to-day management of project tasks and would be the primary point of contact with your firm. An organization chart of the project team may be appropriate.
- ▶ **Project Approach.** Describe the approach, management, and tasks that will be accomplished to complete the project. Provide a narrative description of how the firm proposes to execute the tasks (you may request a detailed scope of services that will be used to negotiate a contract, or a general description of the workflow and key deliverables. A detailed scope is more appropriate for a technical assignment, and a general description is more appropriate for a large project or study). If applicable, discuss any unique aspects of the project, alternative approaches the (Local Agency) might wish to consider or special considerations related to programmatic/funding requirements. Your firm should rely on its expertise and experience with similar projects to demonstrate how it will effectively complete the project.
- ▶ **Project Schedule.** Provide a schedule of general project activities indicating the duration of each activity and of the total project. The schedule should reflect realistic activity durations. (**Optional:** The agency may want to lay out a schedule of key milestones the selected firm would need to meet, such as notice to proceed, design deliverables, construction documents, and completion and delivery of constructed project or study).

- ▶ **Optional: Cost Proposal.** In a separate sealed envelope, submit a cost proposal. Include a breakdown of the estimated hours for each task, an itemized list of other direct costs, the proposed total fee, rate schedule by job classification for the firm and subconsultants, proposed annual escalations effective January 1 of each year, and the structure (lump sum, time and materials, cost plus fixed fee) information to be submitted. Include the firm name and ‘Cost Proposal for (Name of Project, RFP #, Attention)’ on the front of the sealed envelope. The cost proposal submitted in a separate sealed envelope will not be opened by the (Name of Agency) until after the firms have been evaluated and ranked. After identifying the top ranked firm, the (Name of the Agency) will open the top ranked firm’s cost proposal to begin negotiations with that firm.

**Optional:** Brochures or other material that may be helpful in evaluating your firm may be included in an appendix of the proposal.

#### **ADDITIONAL INFORMATION**

Questions regarding the project may be directed to (Department director or another designated manager familiar with the project) at (Provide address, e-mail address and phone number). Questions must be submitted no later than (Time Due) on (Date).

#### **PROPOSAL DEADLINE**

(Number) copies of the proposal must be received no later than (Time Due) (PST) on (Date) at (Specification location – street, building, room number etc.).

Proposals received after the deadline will not be considered. (Page limit may be requested. It should be reasonable for size of project. Clearly state what is included in page count: cover letter, contents page, resumes, dividers, etc. State if minimum font size and line spacing is required, i.e. use minimum 11-point font with 1.15 line spacing in text).

#### **SELECTION PROCESS**

Proposals will be ranked on qualifications and the (Local Agency) may choose to interview (number) of the top ranked firms. (Typically, no more than three. It is costly for firms to prepare and respond to an RFP/RFQ. The agency should show them the professional courtesy of only short listing those firms that have made a quality submittal and are most likely to be selected for the project).

However, at its discretion, the (Local Agency) may dispense with interviews and select a firm to perform the work from the information submitted. Firms will be evaluated on the basis of the following factors (include the % weight for each item) (These should be considered for each project. Will they be equal, is the Project Manager or experience particularly important? You may add or take from the list based on the project and what is important to your agency):

- ▶ Firm History and Capability to Perform Project
- ▶ Relevant Project Experience
- ▶ Qualifications of Project Manager and Key Project Team members
- ▶ Familiarity with Area and Project
- ▶ Project Approach and Schedule
- ▶ Client references
- ▶ Other

Selected references will be contacted.

A selection committee with at least 3 members (use an odd number to avoid ties) appointed by the (Local Agency) will assist with firm evaluations and rank the firms in order of most qualified based on the evaluation factors and weighting listed above. The combined score for each firm will then be made, and the firms listed in order of the most qualified will begin the final selection process.

The highest ranked firm will be selected for negotiations and the three highest ranked firms will be notified of the selection and ranking. The (Local Agency) will then request that the highest ranked firm submit a scope of services and fee to the agency within 2 weeks after receiving notice of the selection. The agency will seek to negotiate a professional services agreement, a detailed scope of services, fee, schedule, etc. with the selected firm that is fair and reasonable. If unable to reach an agreement, the (Local Agency) will terminate negotiations and resume the negotiations process with the second-ranked firm (and if applicable, open the second-ranked firm’s envelope at this time), and so forth.

The (Local Agency) expects to evaluate proposals and provide written notification of the short-listed firms within 30 days of receipt of proposals. If interviews are held, they will be scheduled within (Insert Number) weeks of short-list notification.