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MODEL FORMS FOR A QUALITY BASED SELECTION PROCESS

New Hampshire
Coalition



*Qualifications-Based Selection
of
Architects, Engineers, Land Surveyors,
&
Landscape Architects*

NEW HAMPSHIRE QBS COALITION

An affiliation of:

American Institute of Architects New Hampshire Chapter (AIANH), American Council of Engineering Companies – New Hampshire (ACEC-NH),
American Society of Civil Engineers – New Hampshire Section (ASCE-NH), New Hampshire Society of Professional Engineers (NHSPE)
Structural Engineers of New Hampshire (SENH), Granite State Landscape Architects (GSLA)

QBS *has been required by law for all Federal projects since 1972. In New Hampshire, State law mandates that all State Agencies use QBS. Numerous other organizations and municipalities use QBS because it works. In addition, the QBS process is included in the American Bar Association's Model Procurement Code for State and Local Government.*

- American Institute of Architects New Hampshire Chapter (AIANH).
- New Hampshire Society of Professional Engineers (NHSPE).
- American Council of Engineering Companies - New Hampshire (ACEC-NH).
- American Society of Civil Engineers New Hampshire Section (ASCE-NH).
- Structural Engineers of New Hampshire (SENH).
- New Hampshire Land Surveyors Association (NHLSA).
- Granite State Landscape Architects (GSLA).

New Hampshire QBS Coalition

www.nhqbs.org

QBS Coalition Sponsor Organizations

The NH QBS Coalition is sponsored by six of the leading professional associations who represent New Hampshire Architects, Engineers, Land Surveyors and Landscape Architects.

- AIA NH – American Institute of Architects
New Hampshire Chapter
Website: www.aianh.org
- NHSPE – New Hampshire Society of Professional Engineers
Website: www.nhspe.org
- ACEC-NH – American Council of Engineering Companies – New Hampshire
Website: www.acec-nh.org
- ASCE-NH – American Society of Civil Engineers
New Hampshire Section
Website: www.ascenh.org
- SENH – Structural Engineers of New Hampshire
Website: www.senh.org
- NHLSA – New Hampshire Land Surveyors Association
Website: www.nhlsa.org
- GSLA – Granite State Landscape Architects

Preliminary Scope of Services

(Owner, Contact Person, Project, Project Location)

The scope of services for each project should include the following information in general terms and be limited to one page:

- Identification and involvement of groups such as building committees, boards, citizen groups, etc.
- Description of the requirements for meetings with the above groups.
- Description of studies, surveys, or preliminary feasibility work which may be relevant, useful and available to the firms to be interviewed.
- Requirements for further feasibility planning prior to design and construction.
- Project outline and anticipated general requirements, such as demolition, renovation, new construction, energy, environmental, land use, waste management, site selection, and other factors, as appropriate.
- Anticipated project start and finish time frame.
- Approval process / involvement of groups.
- Other requirements, for example, referendums, public meetings and/or hearings, etc.

Schedule of Activities

(Owner, Project)

DATE

- _____ 1. A preliminary scope of services/needs is developed by the Owner.
- _____ 2. A request for Letters of Qualifications is advertised.
- _____ 3. Letters of Qualifications due. *(Allow a minimum of 10 days for the firms to submit their materials. Before the next action date, references should be reviewed.)*
- _____ 4. A short list of approximately 3 to 5 firms is developed for subsequent interviews. *Selection should be based on qualifications, references, and compatibility with Owner's project.*
- _____ 5. Selected firms are contacted by phone advising of the date for interview and pre-interview site tour, along with criteria to be discussed at the interview. (See Model Form 7b)
- _____ 6. Memo is mailed to unsuccessful firms informing them of who will be interviewed and expressing appreciation for their interest. *(See Model Form 7a)*
- _____ 7. Site/facilities are toured *(date, time and location)*. *Tours should be scheduled at least 10 days prior to the date of the interviews to allow for preparation.*
- _____ 8. Scheduled interviews are conducted. *Firms are ranked according to qualifications.*
- _____ 9. Scope of services is developed jointly with the Owner and the highest ranked firm, and a contract is negotiated.
- _____ 10. Memo is mailed to all firms interviewed indicating the results of the selection process and expressing appreciation for their involvement.
- _____ 11. Post-selection requirements, (public hearing, referendum, as applicable).

Request for *Letter of Qualifications*

To: *(List all firms in alphabetical order)*

From: *(Owner, Contact Person)*

Re: Request for Letters of Qualifications

Your firm is invited to submit your Letter of Qualifications for *(architectural / engineering / surveying) services related to (name of proposed project)*.

Project description: *(provide a brief description)*.

Preliminary requirements are based on studies performed by *the (name of committee or organization)*.

Enclosed are the following:

1. A list of information to be included with your Letter of Qualification.
2. A general definition of the preliminary scope of services.
3. A schedule of dates and requirements for the selection process.

A tour of the facility / site will be arranged for firms that are selected for interview.

Your Letter of Qualifications must be received no later than *(time, day, date)* and shall be addressed to:

(Name and Title)

(Address)

Requirements for *Letters of Qualifications*

(Owner, Project)

Please include the following information in your Letter of Qualifications:

1. Name, address, brief history and description of firm.
2. Résumés of key personnel to be assigned to this project.
3. Related projects / areas of expertise / experience.
 - a) Description of other projects designed by this firm similar to this project.
 - b) Include reference contact information.
4. Description of budgeting, cost and quality control procedures.
5. A brief description of the firm's approach to planning, designing and implementing the project.
6. You are invited to include a maximum of one page of information not covered above, which you feel may be useful.

Letters of Qualifications

Evaluation Process

(The following sample is provided for your use. It is suggested that rating scales be consistent with those used for the interview evaluation. Rating factor: 1 to 5, with 5 being the best.)

Firm Name: _____
(Architectural, Engineering, Surveying)

Rating:

1. Firm's history and resource capability to perform required services. _____
2. Evaluation of proposed personnel. _____
3. Related experience. _____
4. Budget, cost-control experience. _____
5. Familiarity with local area and construction practices. _____
6. Firm's perception of project requirements and project approach. _____
7. Quality control procedures. _____
8. Reference check. _____

Grand Total _____

(You may wish to consider weighting some of the evaluation factors.)

Letters of Qualifications Evaluation Process – Tally Sheet

For use by the review committee to compile the evaluation results of all Letters of Qualifications submitted.

	Firms									
	1	2	3	4	5	6	7	8	9	10
Reviewer 1	—	—	—	—	—	—	—	—	—	—
Reviewer 2	—	—	—	—	—	—	—	—	—	—
Reviewer 3	—	—	—	—	—	—	—	—	—	—
Reviewer 4	—	—	—	—	—	—	—	—	—	—
Reviewer 5	—	—	—	—	—	—	—	—	—	—
Reviewer 6	—	—	—	—	—	—	—	—	—	—
Totals	—	—	—	—	—	—	—	—	—	—
<i>Highest total score is highest ranked firm. Establish ranking for all firms.</i>										
Ranking	—	—	—	—	—	—	—	—	—	—

Reference Check Form

Sample questions to be asked of references provided in the firm's Letter of Qualifications.

Firm Name: _____
(Architectural, Engineering, Survey)

Project Reference: _____

Person Contacted: _____

1. What was your project?
2. When was it completed?
3. What did the firm do for you on this project?
4. Who was the chief staff person assigned to work with you?
5. Were you satisfied with this person's work?
6. Was the project started and completed as scheduled?
7. Did the firm achieve the project's goals?
8. Did the firm demonstrate good problem solving skills?
9. Were budget and cost control measures handled effectively?
10. Did you and the design team work well together?
11. Would you hire the firm again for another similar project?
12. What is your overall evaluation of the firm based on your experience?

Memo to Firms

Not Selected for an Interview

To: *(List firms not asked to interview – in alphabetical order)*

From: *(Owner, Contact Person, Address)*

Re: Status of the Selection Process

The *(committee or board)* would like to express their appreciation to you and your firm for submitting your Letter of Qualifications.

After careful consideration of all firms who submitted their qualifications, ___ (#) firms have been selected for interviews.

For you information, the firms selected for further consideration are:

(List in alphabetical order)

- 1.
- 2.
- 3.
- 4.
- 5.

While you firm was not selected for an interview, we appreciate your interest in our project and the time spent in the preparation of your submission.

Memo to Firms

Selected for an Interview

To: *(List firms asked to interview – in alphabetical order)*

From: *(Owner, Contact Person, Address)*

Re: Status of the Selection Process

The *(committee or board)* would like to express their appreciation to you and your firm for submitting your Letter of Qualifications. The firms listed above have been selected for interviews.

Enclosed are the following:

1. List of criteria to be used in the evaluation process.
(Items on Form 8)
2. A copy of *(name of studies or reports)* compiled by *(name of committee of group)* for your information and review.

Each firm will be allowed ___ minutes to present their qualifications and to answer questions. At the completion of the interviews, the committee will rank the firms interviewed in accordance with their determination of which firm is most competent and compatible for the project. The highest ranked firm will enter into discussions with the Owner regarding required scope of professional services and contract negotiations. If contract terms cannot be reached, negotiations will be terminated and the firm ranked second will be invited in for scope of services discussions and contract negotiations.

Interviews will be held on *(date)*, at *(location)*.

The order and time of interviews is:

Firm A: *(Time)*
Firm B: *(Time)*
Firm C: *(Time)*
Firm D: *(Time)*
etc.

A tour of the site/facility has been arranged for *(date, time)*. Please send your firm's representative to this tour.

Interview Process

Issues and Score Sheet

This interview criteria list is for use by Interviewers and may be provided to firms prior to interviews for their information:

Category	Points Awarded	Possible Points
1. Grasp of Project Requirements (firm's analysis, preparation and interest)	_____	_____
2. Design Approach/Methodology (firm's creativity and problem solving)	_____	_____
3. Key Personnel and Roles (experience and professional skills)	_____	_____
4. Pertinent Experience of Firm (related completed projects)	_____	_____
5. Pertinent Experience of Individuals (related completed projects)	_____	_____
6. Consultant/In-House Resources (range of support expertise, 3CAD)	_____	_____
7. Technical Management/Quality Control (cost and quality control, field work)	_____	_____
8. Responsiveness to Owner's Concerns (personal chemistry, communications)	_____	_____
9. Method of Contraction (lump sum, actual cost, etc.)	_____	_____
10. Proposed Schedule for the Work (realistic, major milestones included)	_____	_____
11. Other Relevant Issues (other issues presented by firm)	_____	_____
GRAND TOTAL	_____	_____

Notes:

Group Interview Evaluation Form

For use by chairperson to compile all scores of interviewers.

Combined Group Totals

	Firm A	Firm B	Firm C	Firm D
Interviewer 1	_____	_____	_____	_____
Interviewer 2	_____	_____	_____	_____
Interviewer 3	_____	_____	_____	_____
Interviewer 4	_____	_____	_____	_____
Interviewer 5	_____	_____	_____	_____
Interviewer 6	_____	_____	_____	_____
Interviewer 7	_____	_____	_____	_____
Interviewer 8	_____	_____	_____	_____
Grand Total	_____	_____	_____	_____
Ranking	_____	_____	_____	_____

Memo to Firms

After Interview

To: *(All firms interviewed – in alphabetical order)*

From: *(Owner, Contact Person, Address, Project)*

Re: Status of the Selection Process

The Selection process for professional services for the above named project has been completed.

Our objective has been to select the most qualified firm to perform this service. The *(committee or board)* has chosen *(Firm #1 name)* as the best-qualified firm to assist us in this project.

We have now entered into contract negotiations with *(Firm #1 name)*. The *(committee or board)* expresses their appreciation for you interest, time and effort spent on our behalf.

Design Professional Performance Evaluation

After Completion of Services

This can be very helpful in the selection of design professionals. A properly performed performance evaluation contributes to the building of a relationship of mutual trust between the owner and the design professional.

1. Immediately after project completion, two or three key people from the owner's staff independently complete this evaluation form, then meet to discuss and reach a consensus on a composite evaluation.
2. When consensus is achieved, a copy of the evaluation is sent to the design professional and a meeting scheduled to discuss the various points on the evaluation.
3. This discussion must be candid and without rancor. The owner must be open to allowing the design professional to explain extenuating circumstances that may have contributed to any apparent poor showing. Similarly, the design professional must accept responsibility if the firm's services fell short in any areas.
4. Once agreement is reached on the evaluation, both parties sign the form in the spaces provided.
5. A copy is given to the design professional and a copy placed in the owner's project file.

Name of Firm:

Project :

Location:

1. Did the project meet the program requirements?
2. Was the project completed on time?
3. Was the project completed within the budget?
4. Were the construction documents adequate?
5. Were the change orders the result of a revision of the scope of work or incomplete construction documents?
6. Did the design professional relate satisfactorily with the owner and the contractor(s) on the project?
7. Did the design professional handle the project administration in a complete and efficient manner?
8. Would you retain the design professional again on a future project?
9. Overall performance rating? (excellent, good, fair, poor) Comments:

Owner

Firm