Procuring Engineering Services for a Quality Project: Qualifications-Based Selection

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Getting the Best Project at the Right Price
QBS GUIDE

Qualifications-Based Selection

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Inupiaq word of the day:
sivunnuuruk (N)
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sivunnuuruk (N)
is steadfast, continues on regardless
**Scope**: Clearly defines the project requirements, deliverables, end products, documents and reports that are expected to be provided by the Engineer.

**Budget**: Clearly defines the project cost for performing and completing the specific scope.

**Schedule**: Defines the task / project start and finish dates, timelines for different phases of the project and the various milestones.
Scope of services

- Environmental Consultation
- Archaeology
- Survey
- Geotechnical
- Design
Scope of services

- Environmental Consultation
  - CATEX
  - EA
  - Wetlands permitting
  - Fish Habitat permit

- Archaeology
  - Arch. Survey
  - Arch. Review/report
  - Corridor route
  - Selected corridor route
  - Site control issues
  - Level of investigation

- Survey
  - Selected route
  - Standards
  - Alternatives
  - Conditions
  - Materials

- Geotechnical

- Design
Scope of services

• Environmental Consultation
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  - Materials

• Geotechnical

• Design
Let the experts help!
Let the experts help!

- Project Need
- Select Engineer
- Develop Scope
- Set Budget/schedule
- NTP

QBS
Let the experts help!

This is how the QBS process works
WHAT IS: Qualification-Based Selection (QBS)

QBS is a procedure that facilitates the selection of professional design firms

- QBS is required for numerous State and Federal Agencies.
- It is a proven step-by-step process that is straightforward and easy to implement.
- QBS facilitates the development of an appropriate scope of work for a specific project.
- QBS is objective and fair.
- QBS can be well documented and is open to public scrutiny.

QBS meets the owner's interest to get the best available professional design services for the money and to conduct a fair and equitable selection process.
Federal Brooks Act mandates QBS (Effective date: October 1972)

- The Federal Brooks Act establishes a federal government policy to:
  1. Publicly announce all projects
  2. Select architects and engineers based upon competence and qualifications (not price)
  3. Negotiate contracts that are fair and reasonable
- Applies to all federal agencies and to engineering services;
- May apply to recipients of federal funds such as federal highway, etc.
- Requires agencies to seek and evaluate prequalification of firms;
- Requires agencies to discuss a project with no less than three firms and rank the firms in order of preference;
- Requires the agency to negotiate a contract with the top ranked firm;
- Failing to reach a contractual agreement, the top ranked firm must be dropped from consideration and negotiations should begin with the next ranked firm and so on until a satisfactory agreement is reached.
**Selection Stage**

- Statement of Qualifications (SOQs) are requested
- Receive and review SOQs from Engineers
- Evaluate SOQs and rank (score) the firms

**Negotiation (confirmation) Stage**

- Top Firm is selected and assists in defining Scope of Work
- Negotiate details (Scope, Budget, Schedule).
  - Is it agreeable?
  - No: Go to the Next qualified firm on the list
  - Yes: Retain selected firm
Statement of Qualifications (SOQs) are requested

Receive and review SOQs from Engineers

Evaluate SOQs and rank (score) the firms
Statement of Qualifications (SOQs) are requested

Receive and review SOQs from Engineers

Evaluate SOQs and rank (score) the firms

- Identify Need
  - LRTP
  - Access to ______
- Define Problem
- General scope of work
- Schedule of selection process
  - RFP due date
  - Selection date
- Selection criteria
EXAMPLE

- **Need**: No room to build more homes.
- **Problem**: Existing homes are within 100-year floodplain and we’re lacking building sites.
- **General Scope**: Plan and design new subdivision roads to accommodate about 13 new homes. Preliminary area selected by tribe for future development.
- **Schedule**: Statement of Qualifications due: _____
  - Review by council date:
  - Shortlist date:
  - Interview date:
  - Selection date:
- **Scoring Criteria**:
  - Experience of firm (for similar scope of services)
  - Experience of team
  - Local / Regional experience
  - Indian Preference
Selection Stage

Statement of Qualifications (SOQs) are requested

Receive and review SOQs from Engineers

Evaluate SOQs and rank (score) the firms

Negotiation (confirmation) Stage

Top Firm is selected and assists in defining Scope of Work

Negotiate details (Scope, Budget, Schedule). Is it agreeable?

No

Go to the Next qualified firm on the list

Yes

Retain selected firm
Negotiation (confirmation) Stage

Top Firm is selected and assists in defining Scope of Work

Negotiate details (Scope, Budget, Schedule).

Is it agreeable?

- Yes: Go to the Next qualified firm on the list
- No: Go to the Next qualified firm on the list

Retain selected firm

- Clarify and confirm the scope of work including investigations, studies, reports, permitting support, and deliverables.
- Establish a realistic schedule based on the specific scope.
- Establish reasonable fees based on specific scope and schedule.
Negotiation (confirmation) Stage

Top Firm is selected and assists in defining Scope of Work

Negotiate details (Scope, Budget, Schedule).

Is it agreeable?

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Yes

Retain selected firm

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What if we can’t come to an agreement?
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What if we can’t come to an agreement?
Enter Contract with select engineering firm

Client’s Interest

Firm’s Interest

Winning Project
Thank you!
Questions?
Let the experts help!

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