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**Facility Planning, Construction & District Support Services
Internal Procedure: 14-01 Request for Qualifications and Request for Proposals
Guidelines, Steps & Timelines for Professional Consulting Services**

Step #	Description of Activity	Estimated Time Needed	Cumulative Run Time- High End	Cumulative Run Time - RFP Only
1	Write and prepare RFQ/RFP. Utilize most current templates. For RFPs, develop scope descriptions, schedule, etc.	4 weeks (RFP scope may take longer depending on project and type of work)	4 weeks	4 weeks
2	RFQ is advertised in OC Register and/or District Website Depending on type of RFQ, Emailed to Interested Vendors List. RFP is sent to prequalified list of consultants if list exists.	1 day to post, typically 60-90 days for RFQs, typically 3- 4 weeks for RFPs with a prequalified list of consultants	16 weeks	8 weeks
3	Screening panel convenes to screen/ review responses, refer to Screening Panel Guidelines and criteria of evaluation matrix	2-3 days for panel paper screening	17 weeks	9 weeks
4	Interviews by screening panel for RFQs and establishing prequalified consultant lists (utilize same panel members as paper screening). Interviews for RFPs if applicable and deemed appropriate by panel. Conduct reference checks. Refer to Screening Panel Guidelines	1-3 days to conduct interview, depending upon availability of panel members, typically 2 weeks to coordinate schedules	19 weeks	11 weeks
5	Screening Panel makes an unanimous recommendation on consultant (RFPs) or pre-qualifying a firm (RFQs) for list. All members must agree.	1 day or up to 2 weeks (depends on panel and reference checks)	21 weeks	13 weeks
6	District negotiates final terms of agreement and costs if RFP	2-4 weeks	25 weeks	17 weeks
7	If parties agree, District prepares Board Agenda Docket for recommendation to Board (RFP), Draft Board Dockets are prepared 1 meeting in advance check docket schedule.	2-4 weeks	29 weeks	21 weeks

**General Guidelines
For Screening Panel Members
(Selection of Professional Consultants)**

On behalf of the Rancho Santiago Community College District (“District”), Facility Planning, District Construction and Support Services Department, thank you for agreeing to participate as a screening panel member. These guidelines are provided to panel members to assist you through the screening and selection process for professional consultants. According to Board Policy BP 6605 Selection of Architects, a Request for Qualifications (RFQ) or Request for Proposals (RFP) shall be developed by the Department and the selection of an appropriate architect shall utilize criteria in the evaluation to determine appropriate qualifications. As the selection process is a qualifications and experienced based review process, the panel is required to determine if the consultant meets the standards outlined by the District’s Board policy.

In addition, if you are contracting for architectural, landscape architectural, engineering, land surveying, environmental, and/or construction project management, Government Code Section 4525 – 4529.5 outlines guidelines for the selection of such services to promote a fair, competitive selection process which prohibits governmental agency employees from participating in a selection process when they have a financial or business relationship with any private entity seeking a contract that may pose a conflict of interest that is unlawful. Therefore, these guidelines were developed with the intent of assisting panel members through a procedure where companies and respondents are evaluated based on objective and fair standards.

This screening evaluation process can also be applied to other professional consultants such as geotechnical, testing and inspection, Division of State Architect (DSA) inspectors, other engineers, project managers, professional specialty consultants (i.e. furniture, science equipment, acoustical, etc.) or other vendors that may be subject to such evaluation as deemed appropriate by the District.

Screening Panel Membership:

- The chair of a screening panel shall assemble and convene members of the panel. The panel shall be representative for the project and service being requested by the department. To determine the appropriate representatives to be on the panel, you may consult with the Assistant Vice Chancellor or the Director of Facilities Planning, District Construction and Support Services for guidance, including consultation with the Director of the Purchasing Services Department.
 1. If the RFQ/RFP is for a major capital project for the college, you shall include: three (3) representatives from Santa Ana College, three (3) representatives from Santiago Canyon College, and three (3) representatives from the District Office Facility Planning, Construction and District Support Services Department for the selection of any architect and/or project/construction management consultants.

2. All other professional services and for minor capital projects, the panel chair has the discretion to determine the appropriate representation needed for the panel.
 3. Appropriate subject matter experts shall always be included on the panel.
 4. Where reasonable and appropriate, include an independent panel member that may not be directly associated with the requesting department or project.
- For RFQs, a screening panel shall consist of no less than five (5) members. The screening panel shall consist of a minimum of one (1) representative from Santa Ana College and one (1) representative from Santiago Canyon College.
 - For RFPs, of major capital projects, a screening panel for the selection of architects, project/construction manager shall consist of no less than nine (9) members and include representatives as noted above in item 1.
 - For RFPs related to College Facility Modification Requested (FMR) projects, the screening committee shall include the Vice President of Administrative Services who shall then determine if additional members are needed for the screening panel for the selection of architects and project/construction managers.
 - A screening panel shall consist of no less than three (3) members for any other type of professional service solicitation, or for RFPs that are for minor capital or maintenance projects.

Responsibilities of Screening Panel Members:

- The chair of the screening panel shall facilitate the panel discussion. The chair shall explain to the panel members the process of evaluation for RFQ/RFP professional consultant selection.
- Each panel member shall remain professional, objective and fair throughout the process
- The panel shall evaluate all proposals submitted
- The panel shall utilize the evaluation matrix provided
- The panel members shall evaluate the criteria of evaluation and discuss such in accordance with the scope of the project, and/or RFQ/RFP
- Panel members shall screen proposals as a group
- Panel members shall come to an unanimous decision throughout the process until a recommendation is made and finalized

Use of Evaluation Matrix (See Attached Evaluation Matrix):

- Members shall determine the criteria of evaluation
- Members shall utilize the evaluation matrix provided
- Members shall review the categories of criteria and discuss such to ensure panel members understand the criteria
- Members shall reach an unanimous decision throughout the screening process
- Members shall determine if interviews are necessary or required
- Members shall conduct necessary reference checks (see Sample Reference Check Form)

- Upon completion of reference checks, the panel shall make a final recommendation and sign a final evaluation matrix form and there shall be unanimous agreement by all panel members on the recommendation.
- Do not sign the form with handwritten notes. A FINAL TYPED form shall be utilized and completed for signatures by panel members.

The following are **Criteria of Evaluation Categories** and a description of what panel members review and discuss to determine the adequacy, thoroughness and responsiveness.

1. Responsiveness to the RFP: breadth and depth of response, completed Firm Information Form
2. Firm Information: complete information regarding firm location, ownership, etc. Completed Firm Information Questionnaire (legal history, insurance coverage, safety record, disputes, termination, bankruptcy)
3. Firm Project Experience: completed the form and demonstrates adequate and relevant experience, community college and/or school district experience, experience with Division of the State Architect (DSA), proven experience in meeting schedules and deadlines, adequately addresses items noted on form
4. Project Team and Sub-Consultants: has provided all team member resumes with appropriate information, project experience noted, licenses noted, qualifications noted
5. Current Workload & Availability: has adequate resources to support project, firm's support staff, project team and/or sub-consultants
6. Firm Approach & Methodology: outlines a proposed methodology to be utilized in design of project as it relates to involvement of faculty, staff, management and other interested parties; evidence of ability to prioritize project and begin job in a timely fashion, able to address appropriately and differentiate aesthetics and functionality objectives of projects, has experience with site evaluations for projects
7. Specific Team Member Project Experience: evaluate team member experience, relevancy for project and scope, totality of team members including sub-consultants identified to work on project
8. Fee: has provided a proposed fee, provided billing rates for team members and sub-consultants, has competitive rates in comparison to others, completed the Billing Rate Form
9. Budgets/Cost Estimates: proven experience in accuracy of firm's cost estimates
10. Firm located in District or Orange County (for locally-funded projects), filled out the local hire/business form
11. Veteran owned firms and/or DVBE firm
12. Completed Certification Form
13. Completed Statement of Non-Conflict of Interest Form
14. Provided Confidential Financial Information (if requested)
15. Provided comments on Draft Agreement (if applicable)
16. Client Reference Checks: satisfaction of prior/current clients, professional reputation of the firm, past experience working with District

Tools and Resources Available to Panel Members:

- The Request of Qualifications (“RFQ”) and Request for Proposals (“RFP”) will be provided to the panel members for review
- Please review the scope of work outlined in the RFQ/RFP for the specific project
- Please review the criteria outlined in the RFQ/RFP
- All proposals from consultants submitted
- Screening Evaluation Matrix
- Firm Reference Check

Panel Chair Checklist:

1. Preparation of RFQ/RFP completed
2. RFQ/RFP peer review or legal review if needed
3. Determine advertisement and release date
4. Determine RFQ/RFP question deadline for respondents
5. Determine due date
6. Determine submittal type (i.e. if electronic submittals are acceptable)
7. Determine panel screening members
8. Convene and schedule screening of panel for paper screening
9. If applicable, determine if panel will conduct interviews and create schedule for interviews
10. Conduct reference checks
11. Screening panel makes final recommendation
12. District to negotiate final contract terms and fee
13. Prepare agreement and retain consultant approval of agreement
14. Prepare docket recommendation for consideration of approval

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