

0110.09 Professional Services (Major Projects)

Issued January 1, 1994

SUBJECT: Professional services (Major Projects)

APPLICATION: Executive Branch Departments and Sub-units, community colleges, and higher education.

PURPOSE: To provide for the selection of architects, engineers, surveyors, appraisers, or testing firms for professional services at state facilities. For major projects (over \$1M) or for initial indefinite-scope/indefinite delivery contracts

CONTACT AGENCY: Department of Management and Budget (DMB), Facilities Administration (FA), Design and Construction Division
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SUMMARY: The agency and Facilities Administration (FA) jointly review qualifications of interested professional service contractors and select the most qualified firm to provide services related to a certain project.

APPLICABLE FORMS: DMB-410, -427, -430, -431, -436, -440, -442, -452, -455, -463, -468, -494, and the Contract for Professional Services.

PROCEDURES:

Agency:

- Prepares program statement and submits to the State Budget Office.

Budget:

- Approves or rejects program statement and returns to the agency.

Agency or College/University (when project managed by DMB):

- Obtains funding for project. See Procedure 0110.04.
- Prepares Work Order form and submits to Facilities Administration.
- Requests Facilities Administration to obtain professional service contractor.

FA:

- Holds Project Planning Partnering meeting with agency and other stakeholders to determine project requirements, limitations, communications, scope, schedule, and delivery method.
- Prepares Request for Qualifications (RFQ) and posts on the FA website.
- May also advertise for professional service in a major trade journal or request proposals from firms holding an Indefinite Service/Indefinite Delivery contract.
- In case of emergency or other critical situation, may request a Waiver of Selection Process from the Director, DMB.
- Establishes an Ad-hoc Selection Committee (ASC) with agency.
- Reviews questionnaires from interested professional firms.

ASC:

- Establishes scoring criteria for qualifications.
- Reviews questionnaires for compatibility with desired qualifications.

- Ranks firms in order of their qualifications.
- Selects and recommends most qualified firms (no more than six) to submit proposals.

FA:

- Notifies unsuccessful applicants.
- Prepares Request for Proposal and distributes to firms submitting proposals (technical and cost proposals separately).

ASC:

- Establishes scoring criteria.
- Reviews submitted proposals.
- May invite firms into office for oral presentation.
- Scores firms using a ratio of 80 percent for the technical proposal and 20 percent for the cost proposal.
- Ranks firms in order of resultant score and submits recommendation to Facilities Administration.

FA:

- Prepares recommendation for contract award to the director of the DMB or the State Administrative Board as appropriate.

DMB Director:

- Approves award of contract to professional service contractor.

FA:

- Obtains required insurances and signatures and executes contract.

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