

Town of Hopedale
Request for qualifications (RFQ) Procedure
Selection of Engineering/Architectural Services for
Contracts Subject to Federal Procurement Requirements
(Adopted by Hopedale Select Board April 10, 2023)

Note: A contractor that intends to respond to the Request for Qualifications may NOT participate in the development or drafting of specifications, requirements, statements of work, or invitations for bids or requests for proposals/qualifications, including, but not limited to, the development of the scoring criteria, the final selection of firms to be contacted, or the scoring of proposals. (See 2 CFR 200.319(a))

Step 1. Establish Select Board as Selection Review Committee

Applicable Standards: A City/Town should establish a Selection Review Committee to determine the criteria to select and rate competing Respondents. The committee must include at least one local official, such as a member of the elected governing body. The committee may consist of the entire local governing body; a subset of the governing body; other officers or employees of the locality; employees or officers of third-party public utilities served through the project; or other relevant persons.

Committee members may not have any real or potential conflicts of interest with any of the individuals, firms, or agencies under review (e.g., family relationships, close friendships, business dealings), and no person who might potentially receive benefits from these activities may participate in the selection, award, or administration of a contract supported by funding if he or she has a real or apparent conflict of interest.

Step 2. Determine the Scope of Services

Determine the scope of services required. The scope of work should itemize the tasks needed, with timeframes and achievable goals.

Step 3. Determine the Written Selection Criteria to Evaluate Respondents

Develop written weighted criteria that will be used to evaluate proposals and determine the contract selection award based on the proposed project. Cost or price is NOT used as a selection factor.

The Select Board, which has final authority to approve all professional services contracts, should be closely involved in the establishment of these written selection criteria.

Step 4. Develop the Request for Qualifications (RFQ) Package

Develop a RFQ package to issue to potential respondents. The RFQ package must contain the following three parts.

- Cover Letter
- Request for Qualifications (RFQ)

- The invitation, including specifications and attachments, must clearly describe the scope of services required and identify the factors that will be used to evaluate proposals.
 - to the Town may solicit and procure for preliminary engineering services and design engineering services in one step. A preliminary engineering report must be prepared by a registered professional, which summarizes the project goals and provides a cost estimate. The RFQ must clearly indicate that proposals are being solicited for both preliminary engineering and design engineering services, and must clearly separate the scope and cost of the services associated with preparing the preliminary engineering report for the application and the scope and cost associated with designing the plans and specifications for the project.
 - The RFQ should request that the proposal include/address the following factors:
 - Statement of qualifications;
 - Work experience;
 - Capacity to perform the specific proposed task;
 - Technical expertise;
 - Ability to meet schedules;
 - Proximity of proposer's operations to the area of the proposed work;
 - Familiarity with the area of the proposed work;
 - References – list of past/current clients; etc.
- Sample Contract

Step 5. Advertise the RFQ

Advertise RFQ in a locally distributed newspaper. This may be a paper published in the community, or a regional paper that is available locally.

The proposal deadline must be no less than 10 (ten) days after the publication of the advertisement and contact date of the RFQ.

Step 6. Send RFQ to at least Five (5) Individuals / Firms

Prepare a list of potential firms/individuals

- Include MBE/SBE/WBE and/or Section 3 individuals/firms (per Section 3 program under the Housing and Urban Development Act of 1968, as amended, and 24 CFR 75) in the listing.

Send RFQ package to a minimum of five individuals/firms by email, fax, and/or return receipt mail.

- Document reasons for selecting such individuals/firms for local files.
- Document evidence of contacting five (5) individuals/ firms.
 - If email/fax, print verifiable evidence that email/fax sent.
 - If mail, send return receipt.

The proposal submission deadline must allow at least ten (10) days after the RFQ was sent to these individuals/firms.

Step 7. Evaluate and Rate Proposals

After the proposal submission deadline, review each proposal received by the deadline and evaluate the Respondent's experience, work performance, and capacity to perform either:

- By using prior experience with Respondent(s); and/or
- By contacting all references for the Respondent.

Apply the established evaluation criteria to score each Respondent. Document ratings.

Step 8. Select Respondent

Determine the most qualified provider of services on the basis of demonstrated competence and qualifications.

Once the most highly qualified respondent is identified, request a price proposal. As necessary, negotiate with that provider a fair and reasonable price.

If the cost of the proposed services exceeds \$50,000, then profit must be identified and negotiated as a separate element of the contract price. To comply, the bidder must disclose and certify in its proposal the percentage of profit being used.

If negotiations with the most highly qualified respondent are unsuccessful, formally end negotiations with that provider. Select the next most highly qualified provider and attempt to negotiate a fair and reasonable price. Repeat this process to select and negotiate with providers until a fair and reasonable priced contract can be awarded.

Step 9. Clear Respondent for Federal Requirements

SAM Clearance

- Prior to awarding the contract, verify the Respondent is not listed (is not debarred) through the System for Award Management (www.SAM.gov).

Step 10. Approve the Selected Respondent and Award Contract

Prepare contract for execution by all parties.

Present selection.

Select Board approves selection of firm/individual.

- Standard: The local governing body has the final authority to award contracts but may select another Respondent if the minutes of the local governing body meeting include justification for the selection.

Select Board approves and executes contract.

- The award and the execution of the contract may/may not occur at the same meeting.

Note: For Monitoring purposes:

Select Board must maintain and make available all documentation utilized during the RFQ process, including but not limited to:

- Proof of advertisement (tear sheet/full-page advertisement/photo copy with publisher's identification and date/publisher's affidavit)
- Proof that 5 or more Firms/Individuals were contacted for proposals
- A complete RFQ packet: Cover letter, request for qualifications, rating sheet (if utilized) and a sample contract
- Proof that all proposals were received by the Select Board, with note or stamped date/time received
- Verification that the Firm and Principals of Firm are not on the SAM.gov debarred list (printout of SAM.gov page with date)
- Meeting Minutes documenting the award
- An Executed Contract