



**State of Oklahoma
Office of Management and Enterprise Services
Division of Capital Assets Management
Construction and Properties**

**Consultant
Selection Process**

Oklahoma Statute Title 61, § 62 describes the statutory requirements for the selection of consultants and construction managers for construction projects for all State agencies. The Office of Management and Enterprise Services, Division of Capital Assets Management, Construction and Properties Department is mandated by statute, to monitor and approve the selection process. The following is a guideline for agencies to follow (read each step before you proceed):

- ☐ Step 1: Using Agency
 - Requests copy of Consultant List from Construction and Properties. Example "Letter A" attached.
 - Submit scope of the proposed project and request approval from Construction and Properties. *Letter of Interest to Consultants* shall include the following elements: (Example "Letter B" attached).
 - Description and Scope of Project
 - Estimated construction cost
 - Anticipated starting date
 - Completion date
 - Certification of Funds Available
 - Closing Date for Letters of Interest
- ☐ Step 2: If Construction and Properties:
 - Approves the scope of project required for project, a Consultant List is sent to the Using Agency.
 - Rejects the scope of project required for project, an explanation for rejection is provided by Construction and Properties, and the Using Agency may revise and resubmit the scope of project required for project.
- ☐ Step 3: Using Agency mails each Consultant on the mailing list a copy of the Request for Letters of Interest.
- ☐ Step 4: Using Agency receives Letters of Interest, DCAM/CAP Form 254BV and DCAM/CAP Form 255 from Consultants. Additional information may be submitted with the DCAM/CAP forms. DCAM/CAP Forms may not be altered.
- ☐ Step 5: Using Agency sends to Construction and Properties, a list of firms that submitted Letters of Interest and requests any additional information from each responding consultant's file.
- ☐ Step 6: Construction and Properties:
 - Verifies the registration information of the list of firms that submitted Letters of Interest with the Construction and Properties Registration Database
 - Sends to Using Agency any additional information from each responding consultant's file.
- ☐ Step 7: Using Agency designates a "Screening Committee" to evaluate the submitted DCAM/CAP Forms.
 - Using Agency requests a Construction and Properties representative to be a voting member of Screening Committee and Interview Committee.
 - Screening Committee uses DCAM/CAP Form M101 to select three (3) to five (5) firms to interview.
- ☐ Step 8: Using Agency sends letter to firms selected for interviews. Example Letter "C" attached. Letter should identify:

- Date, time and location of interview
- Time allowed for each interview
- Copy of Evaluation criteria (DCAM/CAP form M102)

☐ Step 9: Using Agency designates "Interview Committee" to interview firms.

- Interview Committee uses DCAM/CAP Form M102 to evaluate firms.
- Interview committee ranks firms according to results of DCAM/CAP Form M102.

☐ Step 10: Using Agency sends a report to Construction and Properties with ranking of Consultants and documentation from Steps 1 through 9 of the selection procedures.

☐ Step 11: Construction and Properties sends Using Agency a confirmation letter that report was received.

☐ Step 12: Construction and Properties meets with selected Consultant to negotiate consulting fees.

☐ Step 13: Using Agency sends requisition to Construction and Properties with funding information for the Consultant service.

☐ Step 14: Construction and Properties:

- Completes Consultant Contract and forwards to selected consultant for signature.
- Forwards contract to Using Agency for signature after receipt of signed Contract and insurance documents from Consultant.
- Completes Purchase Order and signs Contract after receipt of contract from the Using Agency.

☐ Step 15: Using Agency encumbers funding after receipt of signed Contract and Purchase Order from Construction and Properties.

☐ Clarification of Requirements for Solicitation and Selection of Multiple Consultants

To select consultants for multiple projects under one solicitation, the following is required for compliance with Oklahoma statutes and CAP Rules:

- List of individual projects, with project descriptions, must be attached to the solicitation letter. The description must state the project name, general description, anticipated cost, desired completion date, source of funding and any other information that would assist a consultant in determining their interest in the project. (580:20-3-4 (a))
- Solicitation letter must request that responders indicate the project(s) for which they are interested in providing services.
- When screening the applicants, at least two firms must be shortlisted and interviewed for each of the listed projects. (580:20-3-6 (c)). One interview session with a shortlisted firm may be used to address the specific project(s) for which a firm was shortlisted.
- General Provisions
 - Solicitations for multiple projects are allowed for related, logical groupings of minor projects. Any individual project where the projected cost exceeds \$2.5M will require a separate solicitation.
 - Project groupings may include projects of a similar nature funded in a three year budget cycle; minor work with multiple assignments at a single project site, not to exceed three years in duration; or other groupings approved by the State Construction Administrator.

- All multiple project solicitations must have a specific list of anticipated projects attached. Non-specific projects such as “repair and maintenance” are acceptable when all work assignments are initiated within three years of the original contract date.
- Specific projects listed in the solicitation but not initiated within three years of the contract award date will require a new solicitation.

EXAMPLE LETTER "A"

June 23, 2003

Division of Capital Assets Management
Construction and Properties Department
Attn: Consultant Contracting Officer
P O Box 53448
Oklahoma City, OK 73152-3448

Dear Contracting Officer:

The University of Oklahoma wishes to initiate the process required to select an architectural firm to provide professional services in connection with the design of new educational and administrative space on the Norman Campus to house the University's newly created Honors College. The preliminary estimate of the anticipated total cost for the project is approximately \$2 million. Funds for the project are to be provided from proceeds and from private funds and/or the sale of revenue bonds by the University.

The selected architectural consultant will initially assist the University in developing the building program and a project feasibility study. Additionally, the consultant will provide the professional services required to produce the design and the contract documents after approval of the feasibility study.

Please send us a copy of the list of architectural firms that are registered with the Construction and Properties Department of the Division of Capital Assets Management and are eligible to be considered for this project.

Please call me if you need additional information about this project.

Sincerely,

Michael K. Moorman, AIA
Director

EXAMPLE LETTER "B"

May 1, 2003

Ladies and Gentlemen:

The University of Oklahoma intends to select an architectural firm to provide professional services in connection with the renovation of space at the University of Oklahoma Schusterman Center in Tulsa to create new classrooms in Building 4W and an instructional laboratory for the College of Pharmacy. The project will also include necessary code and life safety improvements. The estimated total project cost is approximately \$750,000 to \$1,000,000. It is anticipated that funding will come from a combination of University sources.

The selected architectural consultant will provide the professional services required for detailed space planning, production of the design and contract documents and administration of the construction contract. The consultant selected for this project will be required to maintain a minimum of \$500,000 in Professional Errors and Omissions insurance coverage.

We anticipate that the selection of a consultant will be completed within ninety (90) days and the programming and design phase started thirty (30) days thereafter. It is the intent of the Using Agency to occupy the facilities in the fall of 2006.

If your firm is interested in providing the needed professional services, please respond in writing to me prior to the close of business on May 20, 2005. Your response must include unaltered DCAM/CAP Forms 254BV and 255 (Forms are available at <http://www.ok.gov/DCS>) and should contain the following basic information: (1) a statement outlining the experience of your firm with projects of this scope and type, which provides specific examples including the names of the projects, the dates completed and client references; (2) the names and qualifications of staff members that will be assigned to the project should your firm be selected; (3) other consultants you would propose to include on your team; and (4) the ability of your firm to commence work immediately upon selection. Please provide five copies of all materials submitted.

By offering to provide services, the Consultant certifies that they, and any proposed subcontractors, are in compliance with 25 O.S. §1313 and participate in the Status Verification System. The Status Verification System is defined in 25 O.S. §1312 and includes but is not limited to the free Employment Verification Program (E-Verify) available at www.dhs.gov/E-Verify.

If you have questions about the scope of work, the schedule or other aspects of the project, please contact Mr. Wilton Berry at (405) 271-2305.

Sincerely,

Michael K. Moorman
Director

Cc: Mr. Mickerl Jones, Acting State Construction Administrator, Division of Capital Assets Management

*Please note: Submitting a DCAM/CAP Form 254BV with this solicitation will not automatically renew the Consultant registration with Construction and Properties (CAP). Each firm is responsible for verifying that its registration with CAP is current (<http://www.ok.gov/DCS> , click on the Construction & Properties link, then the CAP Registration Lists link). Firms may renew up to 6 days before the date the Solicitation is due. Firms must register annually by submitting an updated DCAM/CAP Form 254BV to Construction & Properties.

EXAMPLE LETTER "C"

November 3, 1999

Mass Architects
1601 Medical Center Drive
Suite #8
Edmond, OK 73034

Dear Mr. Mass:

Thank you for your interest in our construction project. The initial screening has been completed and your firm has been selected for further review in an interview evaluation.

Interviews will be held on Wednesday, November 10, 1999, at the Division of Capital Assets Management, Construction and Properties, Will Rogers Office Building (2401 N. Lincoln Boulevard), Suite 106, Oklahoma City, Oklahoma. We have allowed for 25 minutes of presentation in response to the questions listed on the evaluation form and an additional 10 minutes for questions. Your presentation is scheduled to begin at 10:00 a.m. Presentations have been randomly scheduled with no reference to results from the initial screening process. You may call me at (405) 425-2478, if you have questions or would like to make arrangements to view the building site prior to the interview.

Sincerely,

2LT Jim McBride #109
Acting Troop Commander
Special Operations

JM/rj