Project: Project Name (eB #)

Note:
- Selection process can exclude interviews and site walkthroughs, unless the project has a >$5M construction value or is technically complex
- State projects require an SUCF-assigned project number and name that are different from Cornell’s e-Builder project number and name
- No one may discuss consultant selection results until after a contract is signed

State RFQ Process *(For State CM at Agent RFQ process, see PD3b)*

☐ PM confirms, prior to advertising, that CCF obtained SUCF project number and name from the SUCF Administrator *(Ellen Chase)*

☐ PM confirms, prior to advertising, that CCF obtained DOB spending authorization from SUCF Administrator *(Ellen Chase)*

☐ PM establishes project-specific selection committee (minimum 3 voting members) and notifies CCF Administrative Coordinator (AC) *(Danielle Hartman)* *(committee members MUST be able to participate in the entire process and attend every meeting)*

☐ CCF Director approves selection committee

☐ PM sets up selection committee kickoff meeting to review scope, draft RFQ, and discuss possible consultant teams who should be notified of ad

☐ PM fills out State RFQ template which serves as the New York State Constract Reporter (NYSCR) ad

☐ PM fills out Minority/Women Business Enterprises (MWBE) and Service-Disabled Veteran-Owned (SDVOB) worksheets located in e-Builder

☐ PM returns draft RFQ and MWBE/SDVOB goal worksheets to AC

☐ AC assigns MWBE and SDVOB goals for project

☐ PM researches appropriate consultants and consults with OUA or FE
☐ PM gives AC list of recommended consultants to notify when ad is posted

☐ CCF Director approves RFQ language

☐ PM schedules placeholder committee meetings

☐ Optional: PM schedules site walkthroughs and/or interviews (for short-listed consultants only)

☐ AC notifies PM that RFQ is approved and posts NYSCR ad for minimum of 15 business days (during this time the AC is the only point of contact for interested consulting firms)

☐ AC forwards ad URL to list of recommended consultants

☐ Optional: Consultants’ site visit (this is not typical and cannot be mandatory)

☐ AC fields RFIs and posts answers to CCF website (any changes to NYSCR ad after it is posted pushes out the due date)

☐ PM drafts Request for Fee Proposal (RFP) (see Request for Fee Proposal below)

☐ AC creates Long List Ranking form

☐ AC e-mails Long List Ranking form, instructions, and all proposals to committee

☐ Selection committee individually completes Long List Ranking form and returns hand-signed forms to AC (can be scanned PDF or hard copy)

☐ AC tabulates scores of long list rankings and e-mails short list to committee

☐ Committee approves the short-listed firms via e-mail

☐ If there is a tie or the committee cannot agree on the short list, committee must meet to come to agreement

☐ AC creates Short List Evaluation forms

☐ PM performs (or assigns to committee) reference checks on short-listed CMs (minimum of three references per CM firm). References shall be obtained prior to the technical evaluation scoring

☐ AC distributes Short List Evaluation forms and instructions to committee

☐ Selection committee individually completes Short List Evaluation form and returns hand-signed forms to AC (can be scanned PDF or hard copy)

☐ AC tabulates scores of short list rankings and sends outcome to committee
☐ If a final selection tie exists, committee must meet to discuss and break tie
☐ Optional: If no tie, selection committee meets to discuss outcome
☐ PM completes the consultant selection committee meeting minutes
☐ PM requests a fee proposal from the selected consultant
☐ AC sends rejection letters to unsuccessful consultants only after a contract is signed with selected consultant (PM may not discuss the outcome with any consultant until after a contract is signed and rejection letters have been sent)

**Request a Fee Proposal (RFP) Preparation**
☐ PM assembles project information while NYSCR ad is posted: hazmat report, existing drawings, sample contract, etc.

**RFP Process**
☐ PM notifies selected consultant
☐ PM works with Contracts Office on RFP, fee justification, State forms
☐ Contracts sends RFP to selected consultant
☐ Consultant creates Fee Proposal and completes forms, then sends to Cornell
☐ PM negotiates fee as required with selected consultant
☐ PM sends accepted fee proposal to SUCF Administrator (Ellen Chase) to obtain design funding (a.k.a. “coding”)
☐ SUCF Administrator notifies PM and Finance when coding arrives (once coding is received it takes 6 - 10 days for it to become available in Cornell’s system)
☐ PM requests contract from Contracts Office and drafts PAR