Project: *Project Name (eB #)*

Large state-funded capital projects may elect to add a Construction Manager at Agent (rarely done)

**Notes:**

- **Warning:** Consultant selected as Construction Manager at Agent CANNOT bid on the project and become the general contractor or subcontractor, even for limited pre-construction services such as estimating
- 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
- Unlike other RFQ selections, the CM at Agent selection process sends the RFP to all five of the short-listed firms
- Unlike other RFQ selections, CM at Agent is “best value” so a fee is requested to be included in the proposals

**RFQ Process for Construction Manager at Agent (CM)**

☐ 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 CM teams who should be notified of ad
☐ PM fills out State RFQ template which serves as the New York State Contract 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 CM with E&PM

☐ 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 CMs 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 CMs)

☐ AC forwards ad URL to list of recommended CMs

☐ Optional: CM site visit (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

☐ Optional: If there is a tie or the committee cannot agree on the short list, committee must meet to come to agreement
☐ PM sends RFP to requests technical proposals and fee proposals from the top five short-listed CMs

☐ 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, instructions, technical proposals, and fee proposals to committee to review

☐ Optional: CM interviews are recommended, but not required

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

☐ AC works with Contracts Office or FCS Finance to complete technical cost scoring analysis using the following formula: 

$$\text{lowest cost} \times \text{points assigned to cost criteria} \times \text{number of committee members}$$

☐ AC distributes final technical scoring to selection committee

☐ Optional: If committee cannot agree on the technical scoring, committee must meet to come to agreement

☐ AC combines technical scoring and cost scoring, then advises committee of the results of the “best value analysis”

☐ PM completes the CM selection committee meeting minutes

☐ AC sends rejection letters to unsuccessful CMs only after a contract is signed with selected CM (PM may not discuss the outcome with any CM 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: applicable scope of work, CM Staffing Detail worksheet, and Construction Manager Cost worksheets for pre-construction and/or construction phase services.

☐ RFP will request fee proposals and technical proposals.

☐ Technical proposals must include the tasks, staffing (including subconsultants), and hours to address the requirements and deliverables as outlined in the scope of work.

☐ If the estimated fee will exceed $200,000, the Diversity Practices Questionnaire will be included in the RFP.

Final RFP Process

☐ PM notifies selected CM

☐ PM works with Contracts Office on fee justification and State forms

☐ Contracts sends forms to selected consultant

☐ Consultant completes forms and sends to Cornell

☐ PM negotiates fee as required with selected CM

☐ 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