

**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 Cox*) (*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 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 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 with RFP process outlined below
- 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 FPAR