

**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 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 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: **lowest cost x points assigned to cost criteria x 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 FPAR