

Project: Project Name (eB #)

Projects that meet OUA criteria for design leadership: Over \$10M; new buildings; alterations to buildings and landscapes that will have a visual impact on the campus; or major interior public spaces. Projects under \$10M, having minor visual impact, or historic preservation/restoration, may use PD2b with appropriately scaled OUA engagement. Note that some space studies may require use of PD2a (Leading to a major capital project). Also refer to the [RACI chart](#) for guidance on PM/OUA roles and responsibilities.

Consultant Selection

- PM schedules initial FCS consultant selection committee kick-off meeting with OUA, PM Director, and Facilities Contract's Manager to discuss roles/responsibilities, consultant selection criteria, RFP timeline, procurement plan, and Project Charter
- PM drafts selection committee list – both voting and advisor members (5 min - 7 max voting members) in consultation with the OUA office
- PM reviews proposed selection committee list with primary stakeholders and confirms proposed members acceptance of responsibility in consultation with the OUA office
- PM completes Procurement Plan in eBuilder (PP) and attaches completed WORD document template for projects over \$2M
- PM schedules committee meetings, site visit, and interview date(s) in consultation with OUA and Contract's Office.
- PM sends invitation to Selection Committee members and copies OUA
- PM prepares material for initial selection committee meeting: Scope, schedule, draft list of potential consultants, selection criteria, meeting agenda etc. in consultation with the OUA office
- Initial Selection Committee Meeting: Review agenda, procurement plan, RFP items, and seek input, plus finalize all future selection meetings/activities
- PM finalizes long list of Consultants to receive RFP in consultation with OUA

- PM completes final edits on individual committee member evaluation forms based on established criteria (Note: if MWBE criteria are to be evaluated, it should be in the RFP and the score card) in consultation with OUA.
- PM completes draft [RFP template](#) and incorporates stakeholder comments prior to initiating the e-Builder RFP Final Review Process.
- If Facilities Contracts RFP edits are significant, changes should be discussed with both PM and OUA prior to final distribution
- Facilities Contracts (FC) sends RFP to approved Consultant Long-List and includes OUA/PM on distribution
- Conduct Consultant site visit orchestrated by PM with consultation of OUA and key stakeholders (Optional: mandatory attendance - OUA/PM)
- Provide site visit meeting minutes including [sign in sheet](#) to Facilities Contracts
- Facilities Contracts responds to RFI's (PM provides support with OUA consultation)
- Facilities Contracts distributes Proposals to PM and OUA via e-Builder or Box
- PM, in consultation with OUA, reviews proposals for completeness and ensures receipt of contract acknowledgement form with no significant reservations noted
- PM sends long-list evaluation form, selection criteria, and proposals to the Selection Committee (Typically by BOX) and CC: OUA
- Receive & consolidate individual Selection Committee scores prior to committee meeting
- Committee meeting to review evaluations and gain consensus on short-list
- PM notifies short-listed firms and schedules interview dates/times
- PM notifies long-list firms that did not make short-list
- PM, with consultation with OUA and Facilities Contracts, submits additional questions/requests for information to be addressed in interview, or fee questions and concerns (If applicable)
- PM revises short-list evaluation forms and questions for final selection phase in consultation with OUA

- PM completes reference checks on short-listed firms in consultation with OUA. Share findings with Selection Committee prior to final selection.
- Selection Committee interviews all short-listed firms (Optional)
- Selection Committee individually completes short-listed evaluation forms
- Conduct Selection Committee meeting: make final recommendation
- PM completes Selection Committee meeting minutes for procurement record, in consultation with OUA, and files in eBuilder
- PM notifies selected Consultant
- PM notifies unsuccessful Consultants

Contract Negotiations

- PM sets up a meeting with OUA and Selected to verify scope, schedule, team, fee, and reimbursable expenses as necessary
- Negotiate final fee and scope items (This should have been addressed above with shortlisted firms receiving additional questions)
- Complete FPAR for design authorization and draft FPAR presentation material (if required) [See FPAR Process Help Folder](#) for more information.
- Request contract execution (CRP in eBuilder)
- Request Letter of Intent (LOI) with contract manager (Optional – for time sensitive projects)
- Set tentative design kick-off meeting and agenda with Consultant and Stakeholders