

Project: Project Name (eB #)

Most versatile and widely utilized Consultant selection process for Cornell Funded projects. Scope can range from small maintenance projects to large renovations. State Funded CPMR&R projects (<\$150k) can also use this process.

Stored input from the Project Details page relative to RFP's shall be integrated into PD2b process as Stakeholder for consultancy on RFP and Consultant long-list development, plus may elect to be a Selection Committee member.

Consultant Selection

- PM drafts consultant selection criteria, RFP timeline, and Procurement Plan
- PM verifies and updates the Project Charter
- PM drafts selection committee list – both voting and advisor members (5 min - 7 max voting members) in consultation with Primary Stakeholder
- PM completes Procurement Plan in eBuilder (PP) and attaches completed WORD document template for projects over \$2M (Not required for Cx)
- PM schedules committee meetings, site visit, and interview date(s)
- PM sends invitation to Selection Committee members (If required)
- PM prepares material for initial selection committee meeting: Scope, schedule, draft list of potential consultants, [AE Selection Matrix Template](#), meeting agenda (TBD), etc.
- 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
- PM completes final edits on individual committee member evaluation forms based on established criteria

- 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 prior to final distribution
- Facilities Contracts (FC) sends RFP to approved Consultant Long-List and includes PM on distribution
- Conduct Consultant site visit orchestrated by PM with consultation of key stakeholders (Optional: mandatory attendance - PM)
- Provide site visit meeting minutes including [sign in sheet](#) to Facilities Contracts
- Facilities Contracts responds to RFI's (PM provides support)
- Facilities Contracts distributes Proposals to PM via e-Builder or Box
- PM 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)
- Receive & consolidate individual Selection Committee scores prior to committee meeting (PM to score fee column and follow the evaluation template instructions)
- Committee meeting to review evaluations and gain consensus on short-list (On small projects or scope, may make final recommendation of Consultant at this juncture)
- 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 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
- PM completes reference checks on short-listed firms and divide this task among Selection Committee. 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 to make final recommendation
- PM completes Selection Committee meeting minutes for procurement record and files in eBuilder
- PM notifies selected Consultant
- PM notifies unsuccessful Consultants

Contract Negotiations

- Meet with selected consultant to verify scope, schedule, team, fee, 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