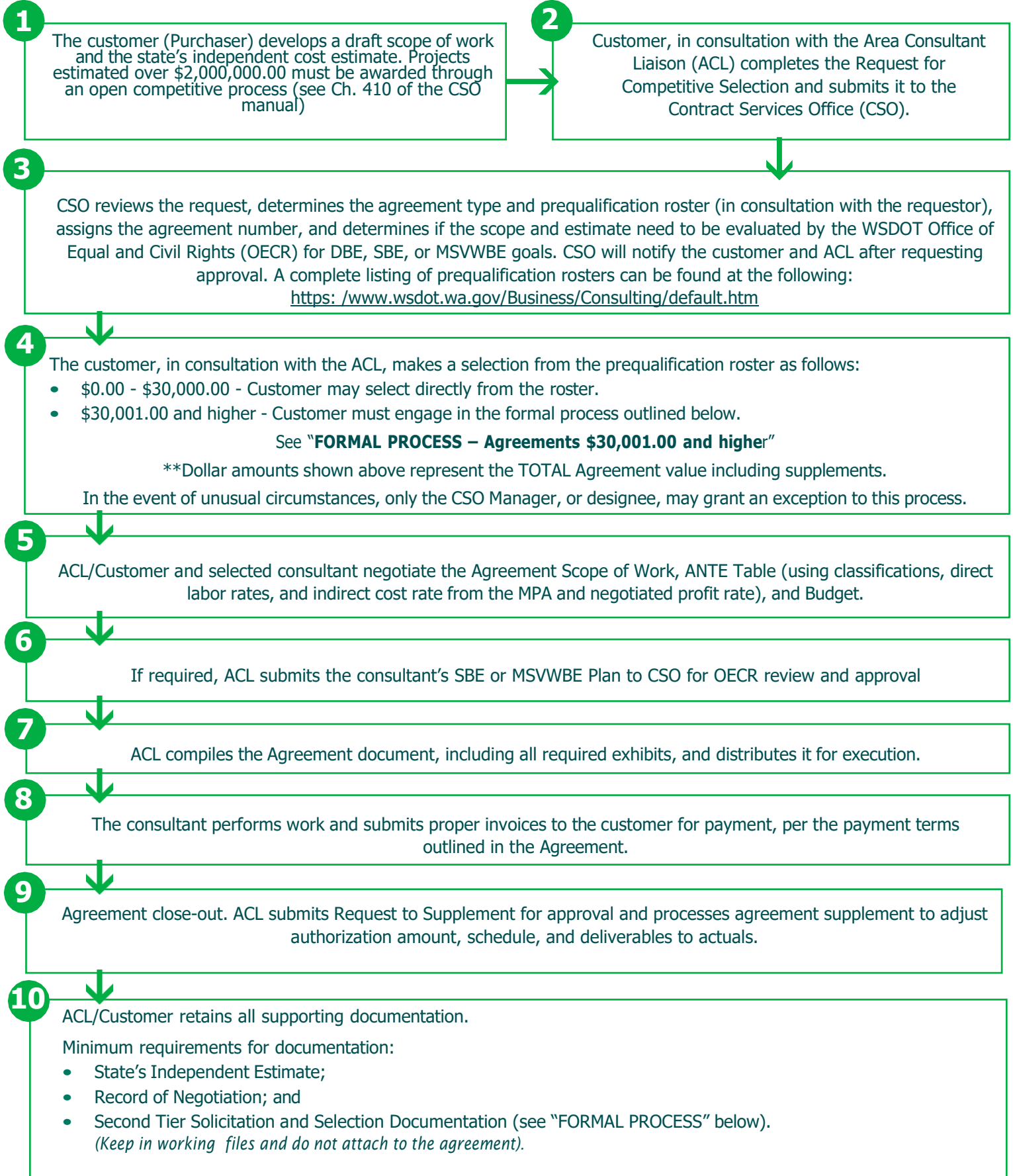


# Consultant Services - Prequalification Process – Request, Selection, and Agreement Negotiation



## FORMAL PROCESS – Agreements \$30,001.00 and higher:

- a. ACL and Customer develop Request for Additional Information (RFAI) documentation. For agreements estimated at less than \$200,000.00, the recommended page limitation for RFAI response should not exceed <3> written pages. For agreements estimated between \$200,000.00 and \$500,000.00, the recommended page limitation for the RFAI response should not exceed <7> written pages. For agreements estimated at more than \$500,000.00, the recommended page limitation for the RFAI response should not exceed <11> written pages. Exceptions may be requested through a written request to the HQ CSO office.
- b. Examples and Templates are available from HQ CSO if needed.
- c. ACL and Customer formally communicate, via email, the Second Tier Competition opportunity. The Request for Additional Information (RFAI) documentation shall be attached to the outgoing email.
- d. Consultants submit responses to ACL/Customer via email by the response due date and time specified in the RFAI.
- e. ACL/Customer coordinates evaluation/scoring of all responding consultant responses. CSO provides score sheet and confidentiality statement templates for independent scorers. Selection is made based on combined results of independent evaluations and/or interview scores. Selection must be communicated to all responding consultants.
- f. ACL/Customer retains all supporting solicitation and selection documentation.
- g. Minimum requirements for documentation:
  - List of firms you sent the “Request for Additional Information” (RFAI) to;
  - RFAI Documents, including copy of the email;
  - Copies of all responses; and
  - Justification for selection (score sheets, notes).
  - (Keep in working files and do not attach to the agreement).

### CSO Provides Templates and/or Examples of the following documents:

- Request for Competitive Selection and Request to Supplement
- Request for Additional Information (RFAI)
- Agreement Boilerplates
- Agreement Exhibits
- SBE and MSVWBE Plan Guidelines
- Record of Negotiation
- RFAI and Selection Correspondence (email examples)

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