

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

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The customer (Purchaser) develops a draft scope of work and the state's independent cost estimate. Projects estimated over \$2,000,000.00 must be awarded through an open competitive process (see Ch. 410 of the CSO manual)



Customer, in consultation with the Area Consultant Liaison (ACL) completes the Request for Competitive Selection and submits it to the Contract Services Office (CSO).

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CSO reviews the request, determines the agreement type and prequalification roster (in consultation with the requestor), assigns the agreement number, and determines if the scope and estimate need to be evaluated by the WSDOT Office of Equal and Civil Rights (OECR) for DBE, SBE, or MSVWBE goals. CSO will notify the customer and ACL after requesting approval. A complete listing of prequalification rosters can be found at the following:

https://www.wsdot.wa.gov/Business/Consulting/default.htm

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The customer, in consultation with the ACL, makes a selection from the prequalification roster as follows:

- \$0.00 \$30,000.00 Customer may select directly from the roster.
- \$30,001.00 and higher Customer must engage in the formal process outlined below.

See "FORMAL PROCESS – Agreements \$30,001.00 and higher"

**Dollar amounts shown above represent the TOTAL Agreement value including supplements.

In the event of unusual circumstances, only the CSO Manager, or designee, may grant an exception to this process.

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ACL/Customer and selected consultant negotiate the Agreement Scope of Work, ANTE Table (using classifications, direct labor rates, and indirect cost rate from the MPA and negotiated profit rate), and Budget.

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If required, ACL submits the consultant's SBE or MSVWBE Plan to CSO for OECR review and approval

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ACL compiles the Agreement document, including all required exhibits, and distributes it for execution.

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The consultant performs work and submits proper invoices to the customer for payment, per the payment terms outlined in the Agreement.

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Agreement close-out. ACL submits Request to Supplement for approval and processes agreement supplement to adjust authorization amount, schedule, and deliverables to actuals.

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ACL/Customer retains all supporting documentation.

Minimum requirements for documentation:

- State's Independent Estimate;
- Record of Negotiation; and
- Second Tier Solicitation and Selection Documentation (see "FORMAL PROCESS" below). (Keep in working files and do not attach to the agreement).

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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