|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Municipality | | | | | | | | |
| Name of Municipality: | | |  | | | | | |
| Contact Person: | | |  | | | | | |
| Contact’s Mailing Address (Street): | | | | | | | | |
| City: | | | | Province: | | | Postal Code: | |
| Telephone Number / Ext: | | | | | | Fax Number: | | |
| Email Address: | | | | | | | | |
| Project Description | | | | | | | | |
| Project Name: | | | | | | | | |
| Project Location: | | | | | | Municipality’s Project No.: | | |
| *Provide a short project description so the consultant can understand the scope and extent of the project.* | | | | | | | | |
| Consultant Selection Process | | | | | | | | |
| RFP Process:  Sole Source  RFP Process Inviting 3 Firms, or  RFQ Process Short Listing to 3 Firms for RFP Process | | | | | | | | |
| Pre-Engineering Work | | | | | | | | |
| *Provide any information regarding any previously completed studies, surveys, feasibility and/or pre-design work relative to the project.* | | | | | | | | |
| Timeline of Project | | | | | | | | |
| *Indicate engineering start date, construction start and completion dates or any other pertinent dates required.* | | | | | | | | |
| Approval Requirements | | | | | | | | |
| *Outline internal/external approvals (i.e. funding approvals, environmental approvals, legislature approvals, council approvals etc.) that will be necessary.* | | | | | | | | |
| Additional Requirements and / or Conditions | | | | | | | | |
| *List any additional or unique requirements or considerations that will affect the project.* | | | | | | | | |
| Time Frame for Consultant Selection | | | | | | | | |
| Name of Project: | | | | | Municipality’s Project No. | | | |
| **Target Date** | **Task #** | **Description of Task** | | | | | | **Completed** |
|  | 1 | Identify needs and develop scope of work and timeframe for consultant selection | | | | | |  |
|  | 2 | Issue to invited consultants a memorandum or place advertisement requesting “Request for Qualifications” (RFQ) from consultant  (Complete Template #2) | | | | | |  |
|  | 3 | Deadline for receipt of “Request for Qualifications” (RFQ) | | | | | |  |
|  | 4 | Review and evaluate “Request for Qualifications” submissions  (Complete Template #3) | | | | | |  |
|  | 5 | Develop evaluation criteria of “Project Proposals” and interviews | | | | | |  |
|  | 6 | Issue memorandum requesting short-listed consultants to submit a “Project Proposal” and attend an interview  (Complete Template #4) | | | | | |  |
|  | 7 | Set deadline for receipt of “Project Proposal” | | | | | |  |
|  | 8 | Issue memorandum to all consultants who submitted a “Request for Qualifications” who were not short-listed.  (Complete Template #5) | | | | | |  |
|  | 9 | Issue “Request for Proposal” (RFP) document to short listed consultants  (Complete Template #6) | | | | | |  |
|  | 10 | Review and evaluate RFP submissions  (Complete Template #7) | | | | | |  |
|  | 11 | Hold interviews with short-listed firms, at times and locations previously communicated.  (Complete Template #8) | | | | | |  |
|  | 12 | Complete the Summary Evaluation Sheet  (Complete Template #9) | | | | | |  |
|  | 13 | Enter into agreement.  Contract is reviewed, negotiated as required and signed  (Complete Document 31, Standard Client/Consultant Agreement) | | | | | |  |
|  | 14 | Send memorandum to all consultants short listed but not selected  (Complete Template #10) | | | | | |  |
|  | 15 | Project proceeds | | | | | |  |

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| --- | --- | --- | --- | --- | --- |
| Project Information | | | | | |
| Project Title: | | | RFQ Number: | | |
| Project Description: | | | | | |
| Client Information | | | | | |
| Name of Client/Organization: | | | | Contact Person: | |
| Mailing Address (Street): | | | | | |
| City: | Province: | | | | Postal Code: |
| Telephone Number / Ext: | | | | Fax Number: | |
| Email Address: | | | | | |
| Invitation | | | | | |
| You are invited to submit your qualifications to provide engineering services for the above noted project. | | | | | |
| Closing Date | | | | | |
| RFQ Due Date: | | Time: | | | Location: |
| Contact Person (if different from the above) | | | | | |
| Name: | | | | | |
| Contact Person Mailing Address (If Applicable) | | | | | |
| Street: | | | | | |
| City: | Province: | | | | Postal Code: |
| Telephone Number / Ext: | | | | Fax Number: | |
| Email Address: | | | | | |
| Delivery Method | | | | | |
| The following indicates the acceptable methods of delivery:        Hard Copies Required  Fax Copies Allowed?  Yes  No  PDF Copies Allowed?  Yes  E-mail Address:  No  **Disclaimer:** Under no circumstances will late Proposals be accepted. | | | | | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| General Information | | | | |
| Project Name: |  | | Date: | |
| Consultant Name: |  | | Time: | |
| Reviewer Name: |  | | | |
| Project Evaluation | | | | |
| **Evaluation Criteria** | | **Maximum** | | **Score** |
| 1 Firm Experience | | | | |
| 1. Management Systems (Quality Control/Safety) | |  | |  |
| 1. Cost Control | |  | |  |
| 1. Subconsultant Experience and Working Relationship | |  | |  |
| 1. Firms' Projects of a Similar Nature | |  | |  |
| 1. Current Relevant Experience of Firm | |  | |  |
| 1. Environmental Policies | |  | |  |
| 1. Social Policies | |  | |  |
|  | |  | |  |
|  | |  | |  |
| **Total** | | **20 - 40** | |  |
| 2 Proposed Consulting Team Members and their Qualifications  (Based on resumes for assigned staff and consultants.) | | | | |
| 1. Availability / Current Workload | |  | |  |
| 1. Key Staff Identified (assured for the project) | |  | |  |
| 1. Professional Accreditation / Awards | |  | |  |
| 1. Necessary Experts | |  | |  |
| 1. Relevant Experience | |  | |  |
| 1. All Required Disciplines Included | |  | |  |
|  | |  | |  |
|  | |  | |  |
| **Total** | | **30 - 50** | |  |
| 3 References and Experience  (Based on the list of similar projects or relevant experience provided with the submission.) | | | | |
| 1. Quality of Service | |  | |  |
| 1. Ability and Effectiveness of Project Leadership/Management | |  | |  |
| 1. Communication | |  | |  |
| 1. Willingness to Assign New Work to Consultant Team | |  | |  |
| **Total** | | **10 - 30** | |  |
| **Grand Total** | | 100 | |  |

|  |  |  |
| --- | --- | --- |
| General Information | | |
| Project Title: | | RFQ Number: |
| Short-List of Consulting Engineers | | |
| For your information the following consultants have been short-listed and have been asked to submit “Project Proposals” and attend an interview. | | |
| **Consulting Firm Name** | **Interview Date and Time** | |
|  |  | |
|  |  | |
|  |  | |
| Final Consultant Selection Procedure | | |
| 1. A Request for Proposals (RFP) will be provided to the above list of consultants detailing the project further. 2. An interview with each consultant will be conducted and included in the ranking of each proponent. 3. At the conclusion of the interviews, consultants will be ranked in accordance with the scores attained from their Project Proposal and Interview. 4. If contract terms cannot be reached, negotiations with the first-ranked consultant will be abandoned and the consultant ranked second will be invited for contract negotiations. | | |

|  |  |
| --- | --- |
| To: | Name of Consultant |
|  | Name of Consulting Engineering Firm |
| From: | Name of Client/Owner |
|  | Title |
| Re: | Status of Consultant Selection Process |
|  | Project Name, Project Number |
| Acknowledgement of your Submission | |
| *Client/Name of Company* wishes to thank you for submitting your qualifications for the above noted project.  Unfortunately your firm has not been short-listed.  Although you were not selected, we appreciate your interest in our project and the resources spent on the preparation of your response to the “Request for Qualifications” | |
| List of Consulting Engineers Short-Listed | |
| For your information, the following practices have been selected to submit “Proposals” and attend an interview: | |
|  | |
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| --- | --- | --- | --- | --- | --- | --- |
| To: |  | | | | | |
| From: |  | | | | | |
| Re: | Request for Proposal and Interview Process | | | | | |
|  | Project Name: | | | | | |
|  | Project Number: | | | | | |
| Request for Proposal Invitation | | | | | | |
| We are pleased to advise that your firm has been short-listed for the above mentioned project. To satisfy the requirements of the next stage in the Consultant selection process, you are now invited to prepare and submit a detailed Proposal and to attend an interview (if required). | | | | | | |
| Closing Date | | | | | | |
| RFP Due Date: | | Time: | | | Location: | |
| Contact Person | | | | | | |
| Name: | | | | | | |
| Mailing Address (Street): | | | | | | |
| City: | | | Province: | | | Postal Code: |
| Telephone Number / Ext: | | | | Fax Number: | | |
| Email Address: | | | | | | |
| Delivery Method | | | | | | |
| The following indicates the acceptable methods of delivery:        Hard Copies Required  Fax Copies Allowed?  Yes  No  PDF Copies Allowed/Required?  Yes  E-mail Address:  No  **Disclaimer:** Under no circumstances will late Proposals be accepted. | | | | | | |
| Questions or Inquiries | | | | | | |
| Contact Name For Inquiries (If Different from the above): | | | | | | |
| Telephone Number / Ext: | | | | Fax Number: | | |
| Email Address: | | | | | | |

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| --- | --- |
| Request for Proposal Documents | |
| The RFP documents shall be the basis upon which Proposals shall be submitted and shall consist of the following: | |
| 1. List documents available for client review. | |
|  | |
|  | |
|  | |
|  | |
| RFP Schedule | |
| **Activity** | **Date** |
| Issue Date |  |
| Close of Questions |  |
| Closing Date |  |
| Interview Date |  |
| Award Date |  |
| Instructions to Proponents | |
| Documents:  Submit mandatory requirements together with request for proposal submission materials. | |
| Proposal Validity:  Proposals shall be valid for a period of days from the Closing Date. | |
| Conflict of Interest:  Proponents must represent and warrant that a conflict of interest does not occur.  The following terms constitutes a conflict of interest: | |
| Addenda:  Where necessary, questions and inquiries shall be responded to by way of Addenda to report any changes to the RFP Documents. Any Addenda issued prior to the closing date will form part of the RFP Documents. | |
| Discretion, Rejection and Cancellation:  *Name of Client/Company* is not bound to accept the lowest cost Proposal, and may decide to cancel the RFP at their discretion, including if there is insufficient response. *Name of Client/Company* shall not be obligated to accept Proposals that are unsigned, incomplete, conditional, illegal, unbalanced, and obscure or contain irregularities of any kind. | |
| Proposal Costs:  *Name of Client/Company* is responsible for any costs, expenses, losses, damages or liability incurred by the Proponents in responding to the RFP. | |
| Negotiations and Fees:   1. Meet with the number one ranked submission to jointly define and review scope 2. Based on agreed scope of work, submit fee proposal 3. If necessary, negotiate fees and any scope modifications 4. Submit final fee together with the defined scope of work 5. Sign Contract 6. If you cannot agree, repeat with number two ranked submission | |
| Proposal Requirements and Proponent Qualifications | |
| Mandatory Requirements:  Proposals must comply with the following requirements in order to be considered by *Name of Client/Company*:   1. Edit, Add or Delete as Necessary: The Proponent is registered with the Association of Professional Engineers and Geoscientists of Alberta (APEGA) to practice engineering in Alberta. 2. The Proponent has a safety Certificate of Recognition (COR) from the Alberta Construction Safety Association (ACSA) or other certifying partner, or is in the process of obtaining one as demonstrated by a Temporary Letter of Certification (TLC) from the ACSA or other certifying partner. | |
| Project Team Composition and Qualifications:  The Proposal should include the following at minimum:   1. Key personnel and roles & responsibility identified 2. Key personnel year of experience 3. Professional accreditation 4. Assignment of resources 5. Past relevant performance as a firm/team 6. Necessary disciplines and experts included 7. Breakdown of project tasks by discipline and appropriate discussion 8. Organization chart, including responsibility and lines of communication. | |
| Project Comprehension and Methodology:  Proponents should provide a clear, well organized and comprehensive narrative that includes at minimum:   1. Understanding of desired project outcomes 2. Proper project description and addresses pertinent issues 3. Clear indication of included and excluded services, optional services and services provided by others 4. Deliverables identified for each task or phase 5. Schedule 6. Integration of sub-consultants or specialist services 7. Approach to schedule, budget and quality control 8. Approach to conflict resolution 9. Innovation. | |
| Relevant Project Experience and Past Performance:  The Proposal should include the following at minimum:   1. Firm/team design projects of similar nature and scope, including senior and project personnel in the past five years 2. Demonstration of local knowledge 3. Scope of services rendered, project objectives, constraints and deliverables 4. Strength of client references from three specific and relevant projects 5. Relevant project awards 6. Explanation of relevant project budget and schedule variations and how they were managed.   NOTE: Requirements in this category should be more specific that the RFQ, and not duplicate information provided in the RFQ. | |
| Proposal Information:  Proposals should contain the following information in order to be considered by *Name of Client/Company****:***   1. Cover Page 2. Executive Summary 3. Table of Contents 4. Section on Project Team Composition and Qualifications 5. Project Comprehension and Methodology 6. Relevant Project Experience and Past Performance 7. Other | |
| Proposal Format:  Allowable paper size(s), minimum font size, minimum margins, preference for double siding and page limits. | |
| Project Proposal and Interview Scoring Criteria | |
| 1. Final selection will be based on a combination of the scores attained from both the Project Proposal Evaluation and the Interview (if necessary). 2. Attached is a copy of the Evaluation Criteria that will be used to assess each Proposal. 3. Attached is a copy of the Interview score sheet. | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| General Information | | | | |
| Project Name: |  | | Date: | |
| Consulting Engineer Name: |  | | Time: | |
| Reviewer Name: |  | | | |
| Project Evaluation | | | | |
| 1 Mandatory Requirements | | | | |
| 1. Consulting engineer meets the mandatory requirements associated with the project | | YES | | NO |
|  | | Proceed with Scoring the Proposal | | Disqualify the Proposal |
| **Evaluation Criteria** | | **Maximum** | | **Score** |
| 2 Project Team Composition and Qualifications | |  | |  |
| 1. Key personnel and roles & responsibility identified | |  | |  |
| 1. Key personnel years of experience | |  | |  |
| 1. Professional accreditation | |  | |  |
| 1. Assignment of resources | |  | |  |
| 1. Past relevant performance as a team | |  | |  |
| 1. Necessary disciplines and experts included | |  | |  |
| 1. Breakdown of project tasks by discipline and appropriate discussion | |  | |  |
| 1. Organization chart, including responsibility and lines of communication | |  | |  |
| **Total** | | **20 - 40** | |  |
| 3 Project Comprehension and Methodology | | | | |
| 1. Clarity and organization of submission | |  | |  |
| 1. Understanding of desired project outcomes | |  | |  |
| 1. Proper project description and addresses pertinent issues | |  | |  |
| 1. Clear indication of included and excluded services, optional services and services provided by others | |  | |  |
| 1. Deliverables identified for each task or phase | |  | |  |
| 1. Schedule | |  | |  |
| 1. Integration of sub-consultants or specialist services | |  | |  |
| 1. Approach to schedule, budget and quality control | |  | |  |
| 1. Approach to conflict resolution | |  | |  |
| 1. Innovation | |  | |  |
| **Total** | | **30 - 50** | |  |
| 4 Relevant Project Experience and Past Performance | | | | |
| 1. Firm/team design projects of similar nature and scope, including senior and project personnel in the past five years | |  | |  |
| 1. Demonstration of local knowledge | |  | |  |
| 1. Scope of services rendered, project objectives, constraints and deliverables | |  | |  |
| 1. Strength of client references from three specific and relevant projects | |  | |  |
| 1. Relevant project awards | |  | |  |
| 1. Explanation of relevant project budget and schedule variations and how they were managed | |  | |  |
| **Total** | | **10 - 30** | |  |
| Grand Total | | 100 | |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| General Information | | | | |
| The purpose of the interview is to determine whether the client and the consulting engineer have compatible objectives, perspectives and attitudes. Questions should explore those concerns and the overall “chemistry” of the client/consultant relationship. | | | | |
| Project Name: |  | | Date: | |
| Consulting Engineer Name: |  | | Time: | |
| Reviewer Name: |  | | | |
| Interview procedures | | | | |
| Consulting Engineers invited to attend and interview should be prepared to address the following issues. Questions from the Consulting Engineer will be accepted after the panel has completed their questions and if time is available. | | | | |
|  | |  | |  |
| **Evaluation Criteria** | | **Maximum** | | **Score** |
| 1 Understanding of the Project | |  | |  |
| 1. Consulting Engineer understands the scope of the project brief and the needs of the client. | |  | |  |
| 1. Consulting Engineer understands the project constraints/opportunities | |  | |  |
| 1. Consulting Engineer’s understanding of other client related issues | |  | |  |
| **Total** | | **30** | |  |
| 2 Project Team and Consultants | | | | |
| 1. Related project experience, ability and capacity of proposed key personnel assigned to this project. | |  | |  |
| 1. Related project experience, ability and capacity of the “Lead Liaison” to the client. | |  | |  |
| 1. Related project experience, ability and capacity of proposed consultants. | |  | |  |
|  | |  | |  |
| **Total** | | **30** | |  |
| 3 Overall Impression | | | | |
| 1. Ability to express ideas | |  | |  |
| 1. Ability to manage the project team | |  | |  |
| 1. Ability/past experience working with the client | |  | |  |
| 1. Communication/listening skills | |  | |  |
| 1. Ability to be flexible/adaptable | |  | |  |
| 1. Consulting Engineer’s response to the question: “Why should we select your practice for this project?” | |  | |  |
| **Total** | | **40** | |  |
| Grand Total | | 100 | |  |

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| General Information | | | | | | | | | | |
| Project Name: | | | | Name of Compiler: | | | | | Date: | |
| This form is intended to be used to compile scores of all proponents that submitted to the “Request for Qualifications”, “Request for Proposal” and attended the “Interview”. | | | | | | | | | | |
|  | Request for Qualifications Summary | | | | | Date of Review | | | | |
|  | Request for Proposal Summary | | | | | Date of Review | | | | |
|  | Interview Summary | | | | | Date of Review | | | | |
| Total Combined Score | | | | | | | | | | |
|  | | ***Engineering Firm A*** | | | ***Engineering Firm B*** | | | ***Engineering Firm C*** | | |
|  | | **Technical Score** | **Interview**  **Score** | | **Technical Score** | | **Interview**  **Score** | **Technical Score** | | **Interview**  **Score** |
| *Name of Reviewer #1* | |  |  | |  | |  |  | |  |
| *Name of Reviewer #2* | |  |  | |  | |  |  | |  |
| *Name of Reviewer #3* | |  |  | |  | |  |  | |  |
| *Name of Reviewer #4* | |  |  | |  | |  |  | |  |
| *Name of Reviewer #5* | |  |  | |  | |  |  | |  |
|  | |  | | |  | | |  | | |
| **Total Score** | |  | | |  | | |  | | |
| **Ranking** | |  | | |  | | |  | | |
| Comments | | | | | | | | | | |
|  | | | | | | | | | | |

|  |  |
| --- | --- |
| To: | Name of Consulting Engineer |
|  | Name of Contact Person |
| From: | Name of Client/Owner |
|  | Name of Contact Person |
|  | Title |
| Re: | Completion of Consulting Engineer Selection Process;  Project Name, Project Number |
| Ranking of Consulting Engineers Responding to RFP | |
| *Name of Client/Company* has completed the process for professional services for the above mentioned project.  Although your firm were not selected, *Client / Name of Organization* express our sincere appreciation for your time, effort and interest on our behalf.  It has been our objective to select the firm whose qualifications and experience best suits our needs for this project. The evaluation results of the selection committee ranks the firms interviewed in the following order: | |
| **Rank** | **Engineering Firm Name** |
| 1 |  |
| 2 |  |
| 3 |  |
| Ranking of Consulting Engineers Responding to RFP | |
| We have now entered into contract discussion and negotiations with *Highest Ranked Consulting Engineer* | |