

SUBJECT: Facilities Planning & Construction Selection Procedures	Effective Date: 3/2/16	Procedure Number: FS 2016 FPC0020	
	Supersedes: FS 2011 FPC0001	Page 1	Of 7
	Responsible Authority: Director, Facilities Planning and Construction		

APPLICABILITY/ACCOUNTABILITY:

This procedure applies to all employees responsible for selecting Professional Services, Construction Management, General Contracting, Trade Services, and Design-Build Services for the University of Central Florida.

PROCEDURES:

A. Selection of Professionals, including Continuing Services Professionals will comply with Board of Governors Regulation 14.005, Certification and Competitive Selection of Professionals. The following procedure will be followed:

Selection of Professionals to perform services for UCF will be made prior to selection of Construction Management firms, unless the Selection Committee elects to select the Architect/Engineer and Construction Manager as a team.

The Selection Committee will comprise:

- the Associate Vice President for the Associate Vice President for Administration and Finance (Facilities and Safety) or his/her designee;
- the Director of Facilities Planning and Construction or his/her designee;
- an operational director within Facilities and Safety (Utilities and Energy Services, Facilities Operations, or Landscaping and Natural Resources), appointed by the Associate Vice President, based on the services to be performed; and
- one or two client representatives, assigned as needed, depending on the project.

The Committee can be expanded at the discretion of the Associate Vice President for Administration and Finance (Facilities and Safety), but will always be weighted to ensure that the majority of the members have demonstrable experience in the selection of professional services, or education in architecture, engineering, construction, or other related facilities disciplines.

The Selection Committee will evaluate professional qualifications statements and proposals on the following criteria:

- the experience of professional personnel;
- past performance;
- ability to meet time and budget requirements;
- location;
- recent, current and projected workloads of the firms;
- project-specific criteria, as requested in the project advertisement or project fact sheet; and
- other relevant topics, as requested in the project advertisement or project fact sheet

A scoring matrix using the above criteria will be developed for each Request for Proposal. It may be modified based on specific requirements of the Request for Proposal, upon Committee decision, but it must include elements to rate the criteria listed above. Committee members will score independently. Upon tabulation of the Committee's scores, the Committee will meet to discuss the professional qualifications statements, proposals, and scores. The combined rankings of the Committee members will determine the firms that will be invited to participate in follow-up discussions.

For firms selected to participate in discussions, the Resource Management department will determine the eligibility under Florida law of each firm to perform the services required. Each firm determined to be eligible to provide the services will be certified and shall be qualified for consideration.

The Committee will conduct discussions with three to six firms, unless there are less than three firms submitting, in which case, the Committee will conduct discussions with all firms. Discussions will consist of a formal presentation (length to be pre-determined by the Committee and sent to the firms ten (10) business days prior to the discussions), followed by a Question and Answer session (length to be pre-determined by the Committee and sent to the firms ten (10) business days prior to the discussions). The presentations will have no specified format or content, but will be at the discretion of the firm presenting. The Question and Answer session may comprise standard questions which have been developed at the short-list meeting and questions which arise based on content of each individual presentation. Individuals who may participate in the discussion sessions are limited to Committee members and the firms' proposed teams, unless others are agreed to by both parties prior to discussions. Discussions will take place at the UCF Facilities & Safety office or the local office of each of the firms, as determined by the Committee.

Interviews will be scheduled by UCF with a minimum of five (5) days' notice, and may be rescheduled or canceled at UCF's discretion. Interviews are mandatory and may not be rescheduled by shortlisted firms. Any firm that does not attend its mandatory interview will be disqualified.

The Committee will evaluate the firms on their qualifications, approach to the project, and ability to provide the required services. The Committee will rank the firms in the order of the most highly qualified to perform the required services. Where possible, the Committee shall recommend to the president for approval no less than three firms, in the Committee's order of ranking. After approval by the president, all interviewed firms will be notified of the approved selection, and contract negotiations will begin.

B. Selection of Construction Management, General Contracting, and Trade Services, including Continuing Services Contracts

Pursuant to Board of Governors Regulation 14.0055, Certification and Competitive Selection for Construction Management Services and Design-Build Services, the following procedure will be followed:

Selection of Professionals to perform services for UCF will be made prior to selection of Construction Management firms, unless the Selection Committee elects to select the Architect/Engineer and Construction Manager as a team.

The Selection Committee will comprise:

- the Associate Vice President for the Associate Vice President for Administration and Finance (Facilities and Safety) or his/her designee;
- the Director of Facilities Planning and Construction or his/her designee;
- an operational director within Facilities and Safety (Utilities and Energy Services, Facilities Operations, or Landscaping and Natural Resources), appointed by the Associate Vice President, based on the services to be performed; and
- one or two client representatives, assigned as needed, depending on the project.

The Committee can be expanded at the discretion of the Associate Vice President for Administration and Finance (Facilities and Safety), but will always be weighted to ensure that the majority of the members have demonstrable experience in the selection of professional services, or education in architecture, engineering, construction, or other related facilities disciplines.

The Selection Committee will evaluate proposals on the following criteria:

- the experience of personnel;
- past performance;
- ability to meet time and budget requirements;
- location;
- recent, current and projected workloads of the firms;
- project-specific criteria, as requested in the project advertisement; and
- other relevant topics, as requested in the project fact sheet.

A scoring matrix using the above criteria will be developed for each Request for Proposal. It may be modified based on specific requirements of the Request for Proposal, upon Committee decision, but it must include elements to rate the criteria listed above. Committee members will score independently. Upon tabulation of the Committee's scores, the Committee will meet to discuss the qualifications statements, proposals, and scores. The combined rankings of the Committee members will determine the firms that will be invited to participate in follow-up discussions.

For firms selected to participate in discussions, the Resource Management department will determine the eligibility under Florida laws of each firm to perform the services required. Each firm determined to be eligible to provide the services will be certified and shall be qualified for consideration.

The Committee will conduct discussions with three to six firms, unless there are less than three firms submitting, in which case, the Committee will conduct discussions with all firms. Discussions will consist of a one-hour Question and Answer session. There will be no formal presentations, though the firms will be allowed ten minutes to tell the Committee about their qualifications, approach to the project, and ability to provide the required services. Individuals who may participate in the discussion sessions are limited to Committee members, the firms' proposed teams, and the selected Architect/Engineer (who may act in an advisory capacity, at the Committee's discretion), unless others are agreed to by both parties prior to discussions. Discussions will take place at the UCF Facilities & Safety office or the local office of each of the firms, as determined by the Committee.

Interviews will be scheduled by UCF with a minimum of five (5) days' notice, and may be rescheduled or canceled at UCF's discretion. Interviews are mandatory and may not be rescheduled by shortlisted firms. Any firm that does not attend its mandatory interview will be disqualified.

The Committee will evaluate the firms on their qualifications, approach to the project, and ability to provide the required services. The Committee will rank the firms in the order of the most highly qualified to perform the required services. Where possible, the Committee shall recommend to the president for approval no less than three firms, in the Committee's order of ranking. After approval by the president, all interviewed firms will be notified on the approved selection, and contract negotiations will begin.

C. Selection of Design-Build Services

Pursuant to Board of Governors Regulation 14.0055, Certification and Competitive Selection for Construction Management Services and Design-Build Services, the following procedure will be followed:

The Selection Committee will comprise:

- the Associate Vice President for the Associate Vice President for Administration and Finance (Facilities and Safety) or his/her designee;
- the Director of Facilities Planning and Construction or his/her designee;
- an operational director within Facilities and Safety (Utilities and Energy Services, Facilities Operations, or Landscaping and Natural Resources), appointed by the Associate Vice President, based on the services to be performed; and
- one or two client representatives, assigned as needed, depending on the project.

The Committee can be expanded at the discretion of the Associate Vice President for Administration and Finance (Facilities and Safety), but will always be weighted to ensure that the majority of the members have demonstrable experience in the selection of professional services, or education in architecture, engineering, construction, or other related facilities disciplines.

Prior to advertising a project and requesting proposals, the Selection Committee will determine the basis for selection, which can be qualifications-based or proposal-based.

1. For qualifications-based selections, the Committee will use the criteria and scoring matrices outlined in Section A for architects, engineers, and other professionals, and the criteria outlined in Section B for Construction Managers and will follow the selection process described in Section B for Construction Managers.
2. For proposal-based selections, the Director of Facilities Planning and Construction and the Design Criteria Consultant will develop design criteria prior to solicitation of proposals. The criteria will be posted on the Facilities Planning and Construction website

when the project is advertised. The Committee will request formal design-build proposals, which will consist of two components:

- a. An information booklet of up to twenty pages, showing bios of the proposed team members and their roles; services to be provided; related past performance information; approach to cost control and estimating; QA/QC; scheduling and on-time performance; safety; LEED; commissioning; and MWBE/SDVOSB participation; and
- b. The design-build proposal, not to exceed 80 pages (40 pages double-sided).
 - Firms may be instructed to submit their design-build proposals in such a way as to maintain their anonymity. The design-build proposals shall be reviewed by a Design Criteria Consultant, who shall provide the Committee with an evaluation of code, structure, engineered systems, life-cycle cost implications, and compliance with design criteria.
 - The Selection Committee will score the design-build proposals independently and rate each firm using the developed matrix. It may be modified, based on specific requirements of the Request for Proposal, upon Committee decision, but it must include elements to rate the criteria listed above. Proposals will be scored on the elements listed in 2.a. above; the quality of the proposal (2.b. above); and on the Design Criteria Consultant's evaluation. Upon tabulation of the Committee's scores, the Committee and the Design Criteria Consultant will meet to discuss the results. The combined rankings of the Committee members will determine the firms that will be invited to participate in follow-on discussions.

For firms selected to participate in discussions, the Resource Management department will determine the eligibility under Florida law of each firm to perform the services required. Each firm determined to be eligible to provide the services will be certified and shall be qualified for consideration.


For both qualifications-based selections and proposal-based selections, the Committee will conduct discussions with three to six firms, unless there are less than three firms submitting, in which case, the Committee will conduct discussions with all firms. Discussions will consist of a formal presentation (length to be pre-determined by the Committee and sent to the firms) and a one-hour Question and Answer session. The Question and Answer session may comprise standard questions and proposal content questions which have been developed at the short-list meeting and questions, which arise during discussions. Individuals who may participate in the

discussion sessions are limited to Committee members; the Design Criteria Consultant (if one is engaged); and the firms' proposed teams. Discussions will take place at the UCF Facilities & Safety office or the local office of each of the design-build firms, as determined by the Committee.

Interviews will be scheduled by UCF with a minimum of five (5) days' notice, and may be rescheduled or canceled at UCF's discretion. Interviews are mandatory and may not be rescheduled by shortlisted firms. Any firm that does not attend its mandatory interview will be disqualified.

The Committee will evaluate the firms on their design-build proposal discussions on qualifications; ability to provide the required services; and approach to the project.

The Committee will rank the firms in the order of the most highly qualified to perform the required services. Where possible, the Committee shall recommend to the president for approval no less than three firms, in the Committee's order of ranking. After approval by the president, all interviewed firms will be notified of the approved selection, and contract negotiations will begin.

Approved By:	Date Approved:
 Priscilla L. Kernek Associate Vice President, Administration and Finance (Facilities and Safety)	3/2/16