

DESIGNER SELECTION POLICY AND PROCEDURES

I. General

A. Purpose

The purpose of this policy is to establish procedures to be followed in selecting design consultants. Procedures as established by this policy are for the purpose of ensuring that design consultants are selected in a fair and uniform manner, that those selected for work are qualified and experienced in designing facilities desired by the Wake County Board of Commissioners/Wake County Board of Education (Boards), and to ensure that every qualified design consultant has the opportunity to be considered for providing professional services to Wake County Government and the Public School System.

B. Definitions

1. "Design Consultant" means any individual, firm, partnership, corporation, association, or other legal entity permitted by law to practice architecture, engineering, landscape architecture, or surveying in the State of North Carolina.
2. "Professional Services" means those services within the scope of the practice of architecture, engineering, landscape architecture, or surveying as defined by the public laws of North Carolina.

C. Application of this Policy

This policy shall apply to the selection of design consultants for publicly funded County government and School System projects where consultant fees are estimated to be in excess of \$30,000 or as governed by NCGS Article 3D of NCGS Chapter 143 (143-64.31 to 64.34).

II. Selection Procedures

A. List of Design Consultants

The Boards shall encourage design consultants including Minority firms to submit and maintain statements of current qualifications and performance data for reference purposes. The Boards shall cause to be established and maintained in their respective Facilities office a file containing this reference material. From this file the Boards shall cause to be prepared and maintained a current list of qualified design consultants.

B. Project Announcement

The Boards shall, on an individual or multiple project basis, cause to be prepared and distributed, an announcement of the need for professional services to all named on the current list of Design Consultants. The announcement will contain a description of the professional services desired, the scope of the work, any schedule requirements, including the deadline for responding to the project announcement, the amount of funds authorized and other appropriate information related to the specific projects.

C. Design Consultant Response

A letter of interest and fully completed proposal for each project must be received by the Boards respective Facilities office within the time established in the Project Announcement prior to being considered for professional services. Proposals shall include Qualifications & Experience Form 254, or similar documentation, and other information in support of the

proposal. Designers are advised to make the submissions simple and address the selection criteria directly.

D. Selection

A selection committee shall be established by the County Manager/School Superintendent (as applicable), or a designated Department Head for the project(s) requiring professional services. This selection committee shall consist of an odd number of members (a minimum of three).

The selection committee shall screen the list of design consultant respondents and select at least three firms for further consideration based on criteria similar to that listed below. The list may be customized for the specific project(s).

1. Specialized or appropriate expertise in the type of project.
2. Past performance on similar projects.
3. Adequate staff and proposed design team for the project.
4. Current workload.
5. Proposed design approach for the project.
6. Recent experience with project cost control and maintaining design schedules.
7. Construction administration capabilities.
8. Proximity to and familiarity with the area where the project is located.
9. Record of successfully completed projects without major legal or technical problems.
10. Other factors that may be appropriate for the project. (e.g. expertise in energy conservation, high performance buildings, etc)
11. Consultant fee proposal (Applicable only to County projects exempted from NCGS Article 3D, Chapter 143)

The above listing of criteria does not indicate the order of importance. The selection committee shall establish a priority ranking for the final list of criteria for the project(s).

E. Review of Proposals

Following the submission of proposals, the selection committee will convene to review the selection rules. Based on the complexity of the project or the number of projects for which services are needed, the committee will decide on how many firms they would like to short list for interviews.

F. Interview Shortlist

Based on individual review of the proposals, the selection committee members share their top candidates. All the results are tabulated and interviewees are short-listed. At least (3) candidates will be selected to participate in the interview process. If the results of a committee vote are not absolutely clear, a discussion may ensue and the committee may re-vote.

G. Interview

Interviews are generally scheduled in 60-minute segments. This allows time for presentation by the designer teams, a period for questions and answers, and a reasonable period for take down and set-up.

The teams are asked in the interview letter to address the selection criteria in their presentations.

H. Final Selection

After completion of the interviews, the selection committee shall select its top candidates and document their final recommendation. In the event the initial evaluation process does not result in a clear recommendation of the top candidate(s), the committee will re-evaluate critical items in order to determine the best candidate(s).

The committee shall provide a written recommendation for review and approval by the County Manager/School Superintendent (as applicable), or the designated Department Head. The recommendation shall list the first, second and third most qualified firm(s) for the project(s).

III. Contract Negotiations and Execution

- A. Upon approval to begin negotiations with a design consultant, designated staff will discuss appropriate information about the project(s) with the design consultant. The discussion will include the scope of services to be provided, the design/review/construction process, and the project(s) schedule and budgetary constraints. A good faith attempt will be made to negotiate final fees consistent with the standard terms of similar contracts as well as the specific services required for the particular project(s).
- B. In the event a fee or contract terms and conditions cannot be agreed upon, designated staff will negotiate with the second most qualified firm. Upon negotiation of an acceptable contract, it will be routed through the contract control process for final review and execution.

IV. Performance Evaluations and Project Closeout

- A. Upon closeout of individual projects, key staff who worked most closely with the design consultant(s) shall evaluate the performance of the design consultant(s).
- B. A session will be held at the completion of each project with representatives of County government or School System (as applicable), and the design consultant, to review the design consultant's performance and the overall success of the project.