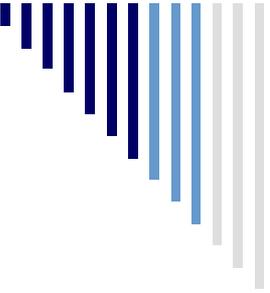


Qualifications-Based Selection Process Enhancements

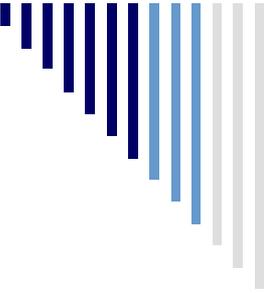


**Contract Management Department
Professional Services Procurement**



Agenda

- Evaluation Criteria and Matrix
- Consultant Evaluation Process
- Questions



Objectives

- Seek enhancements to the existing QBS Process
- Seek efficiency for the consultant community in preparing SOQs
- Identify factors that may impact the results of an evaluation
- Enhance trust in the City's QBS process



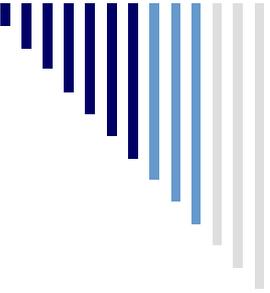
Process Review

- Compiled list of issues to review
 - Internal CMD staff and external COA staff
 - Consultants through debriefings, pre-response meetings, vendor sessions
- Organized into three categories
 - MBE/WBE and Small Business Issues
 - Evaluation Process Issues
 - Evaluator Issues
- Result was series of Enhancements to our QBS Process



Major Discussion Points

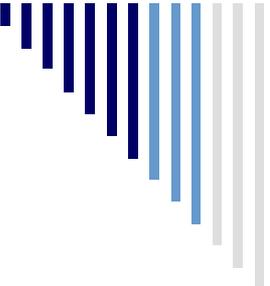
- MBE/WBE Procurement Program
- **Evaluation Criteria**
- **Evaluation Matrix**
- Process Changes
 - Internal Business Processes
 - **Consultant Evaluation**
- Electronic Devices



Schedule

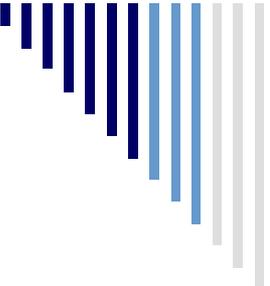
- May 7th – Met with TBAE
- May 9th – Met with TBPE
- May 21st – Documents posted on CMD website
- May 23rd – Vendor Session
- May 31st – Vendor Session
- June 1st – Full Implementation

Item #	Title	<u>Scope Specific</u> Max Pt Value (115 Total)	<u>Rotation List</u> Max Pt Value (100 Total)	<u>Current</u> Max Pt Value (125 Total)
1	M/WBE Procurement Program	N/A	N/A	N/A
2	Turned in All Required Documents	N/A	N/A	N/A
3a	Team's Structure	10	10	12
3b	Team's Project Approach	20	N/A	Combined with Team Structure
4	Experience of Key Personnel	20	25	24
5	Prime Firm's Comparable Project Exp	15	25	15
6	Major Scopes of Work – Comparable Project Exp	15	20	15
7	Team's Exp with Austin Issues	10	10	8
8	COA's Exp with Prime Firm	10	10	11
9	Interviews	15	N/A	25



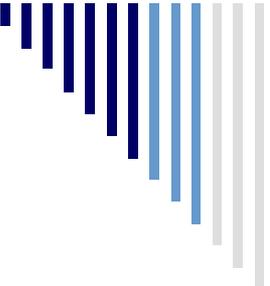
Consideration Item 1 – MBE/WBE Procurement Program

- Requirements remain the same
- Scoring
 - Scope Specific: Yes/No
 - Rotation List: Yes/No



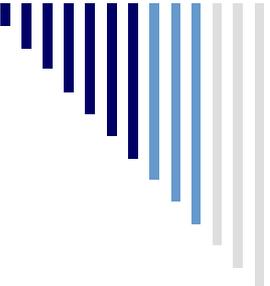
Consideration Item 2 – Turned in all Required Documents

- New criteria item
- Incorporates all requested forms and documents required of Prime Firm
- Scoring:
 - **Scope Specific: Yes/No**
 - **Rotation List: Yes/No**



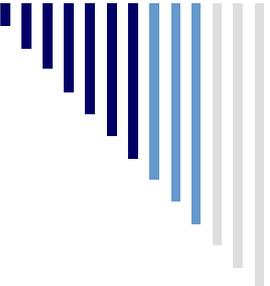
Consideration Item 3a – Team’s Structure

- Previously “Team Structure and Project Approach”
- City looking at:
 - Team’s organizational structure
 - Project leadership
 - Reporting responsibilities
 - How prime firm will interface with City staff
 - How subs will work within team structure
- Scoring:
 - **Scope Specific – 10 points max**
 - **Rotation List – 10 points max**



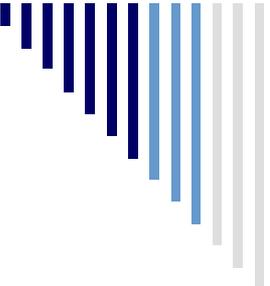
Consideration Item 3b – Project Approach

- Previously “Team Structure and Project Approach”
- City looking at:
 - Team’s overall understanding of project scope and issues
 - Significant project issues and team’s approach in addressing them
- Scoring:
 - **Scope Specific – 20 points max**
 - **Rotation List – N/A**



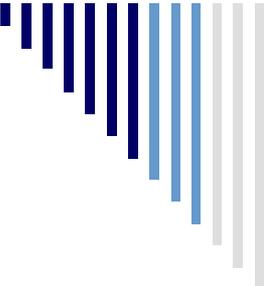
Consideration Item 4 – Experience of Key Personnel

- Requirements remain the same
- Base Requirements
 - **Scope Specific: 3 projects within past 10 years**
 - **Rotation List: 5 projects within past 10 years**
- Definitions of each Key Personnel will be incorporated in RFQ
- Scoring:
 - **Scope Specific – 20 points max**
 - **Rotation List – 25 points max**



Consideration Item 5 – Prime Firm's Comparable Project Experience

- Requirements remain the same
- Base requirements
 - Scope Specific – 3 projects within past 5 yrs
 - Rotation List – 5 projects within past 5 yrs
- Scoring:
 - Scope Specific – 15 points max
 - Rotation List – 25 points max



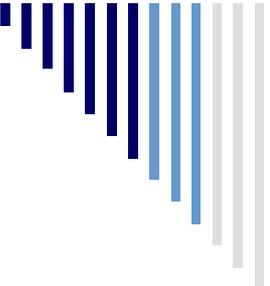
Consideration Item 6 – Major Scopes of Work – Comparable Project Experience

- Previously “Subconsultant Firms’ Comparable Project Experience”
- Changed to reflect that opportunities can be done by prime firm or major subconsultants
- Base requirements
 - **Scope Specific – 3 projects within past 5 yrs**
 - **Rotation List – 5 projects within past 5 yrs**
- Scoring:
 - **Scope Specific – 15 points max**
 - **Rotation List – 20 points max**



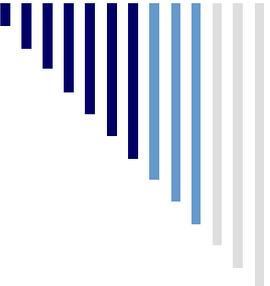
Consideration Item 7 – Team’s Experience with Austin Issues

- Requirements remain the same
- Now includes bullet item requesting prime firm highlight “efficiencies derived from proximity of projects to local office”
- Scoring:
 - **Scope Specific – 10 points max**
 - **Rotation List – 10 points max**



Consideration Item 8 – City of Austin’s Experience with Prime Firm

- Requirements remain the same
- New consultant evaluation process will be implemented simultaneously
- Scoring:
 - **Scope Specific – 10 points max**
 - **Rotation List - 10 points max**



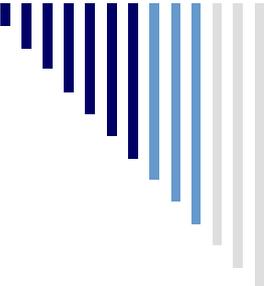
Consideration Item 9 - Interviews

- Requirements remain the same
- Scoring:
 - Scope Specific – 15 points max
 - Rotation List – N/A



Revised Consultant Evaluation Process

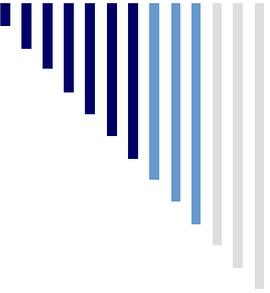
- Points now at 10, not 11
- Evaluation to be completed at Phase End (Preliminary, Design, Bid/Award, Construction phases)
- Evaluation is tied to the services outlined in the PSA
- Appeal process remains



Next Steps for Consultant Evaluation

- Finalize evaluation
- Rules Promulgation process for appeals
- Training for impacted staff

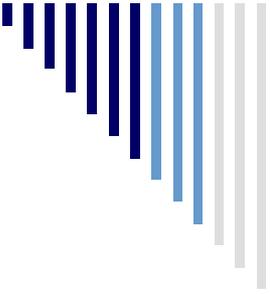
- TARGET FOR UTILIZATION:
 - October 2012



Next Steps for QBS Matrix

- Finalize new RFQ documents
- Training for impacted staff

- TARGET FOR UTILIZATION:
 - New documents to be used June 2012
 - Awards to Council in October 2012



QUESTIONS?



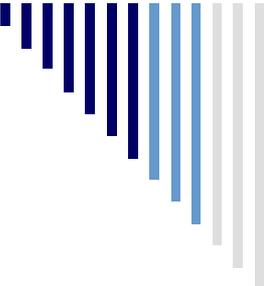
Follow Up Questions

- Please direct questions regarding QBS Matrix to Edward Campos – 974-7206 or Edward.Campos@austintexas.gov
- Please direct questions regarding Consultant Evaluation Process to Barbara Kuhl – 974-9186 or Barbara.Kuhl@austintexas.gov



Why Did The City of Austin Not Use A Stakeholder Process in Reviewing the QBS Enhancements?

- Staff process and staff driven
- Changes reflective of discussions with consultants at:
 - Pre-response meetings
 - Debriefings



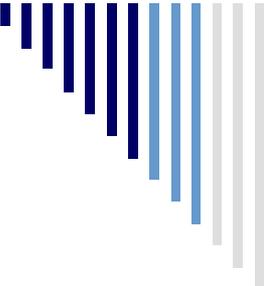
Who Was On The Team That Recommended These Changes?

- CMD staff
- Public Works staff
- SMBR staff
- Capital Planning Office staff



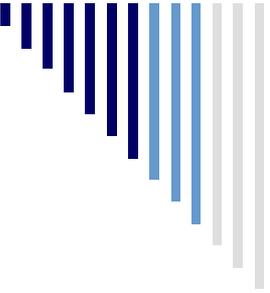
What Is The Roll Out Schedule For The New Evaluation Matrix?

- June 2012
- Awards to Council in October 2012
- Solicitations Impacted:
 - SUE Services Rotation List
 - SCADA RL
 - General Architectural RL



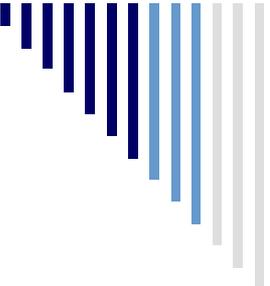
What Is The Roll Out Schedule For The New Consultant Evaluation Process?

- October 2012
- Training of City PM's to new process



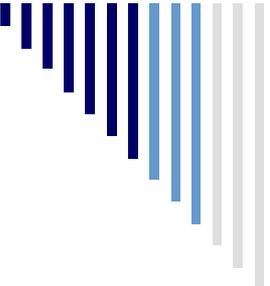
Why Was The Consultant Evaluation Process Changed?

- Reflective of PSA terms
- More applicable to various types of projects/contracts
- In line with Probation, Suspension, Debarment



Why Did The Score For *City of Austin Experience with the Prime Firm* Change From 11 to 10 Points?

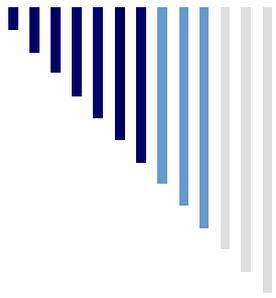
- Score is reflective of 5 point increments
- Score ties into the new consultant evaluation scoring process



How Are You Transitioning From The Old Score Of 11 Points To New Matrix Score of 10 Points?

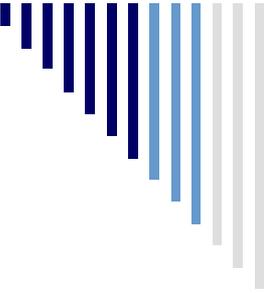
- Prior scores will be proportionally decreased to represent the same percentage of points earned
- Points will be carried out to two decimal places

Matrix Point Value	Current Score New Score with %	% based on 11 points
11	11	100%
10	10	
11	10.5	95.45%
10	9.55	
11	10	90.91%
10	9.09	
11	9.5	86.36%
10	8.64	



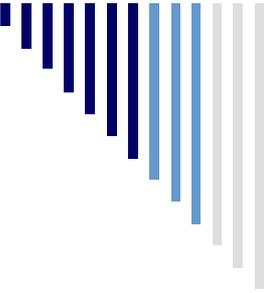
How Are New Firms Being Scored for the *City of Austin Experience with the Prime Firm* item?

- New firms will receive the average score of all firms in our database for the industry
 - A new architecture firm will receive the average score present for all architectural firms.
 - This information will be published in the RFQ



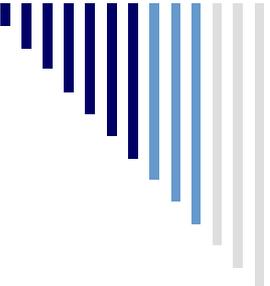
How Long Will The City Keep Consultant Evaluation Scores?

- Five (5) year period
- Maintains consistency with previous process and with our evaluation criteria



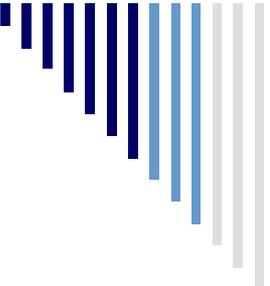
Where Do Prime Firms List Experience On Subconsultant Opportunities?

- Item 6 – Major Scopes of Work – Comparable Project Experience
- Encompasses both Prime experience and Subconsultant experience



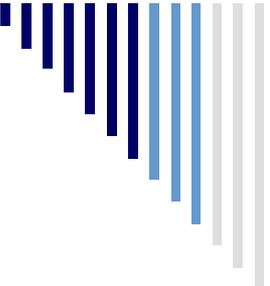
Why Was *Experience & Availability of Proposed Staff* Removed?

- Limited value to the evaluation
- Replaced with Affidavit



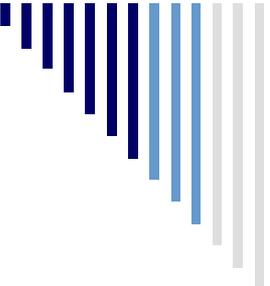
Why Was *Project Approach* Removed from RL RFQ's?

- Project approach does not lend itself to RL's
- No project(s) identified in scope in which to apply approach



What if I have COA experience, but not in that scope of work?

- CMD will determine which projects will be used in the score based on scope of work
- Data base will identify industry and disciplines
- If firm has no experience with COA under that industry or discipline, they will receive average of industry



What are the different categories of industries/disciplines?

- Industry
- Architectural, including space planning & commissioning
 - Planning
 - Surveying
 - Engineering
 - MEP
 - Geotechnical
 - Structural
 - Environmental
 - Water & Wastewater
 - Transportation
 - Drainage