

Professional Services Selection Rating Rubric

State of Ohio Standard Forms and Documents

Selection Criteria						
General						
<ul style="list-style-type: none"> Qualifications should be scored on the information contained in the submitted F110-330. Exceptions: Criteria 1b – amount of contracts awarded can be verified, Criteria 5a - past performance information can be supplemented with public records and evaluations contained in OAKS CI from other Contracting Authorities and references can be checked. If a reviewer has a question during the review and scoring process, all other reviewers should receive the same information and feedback through the selection coordinator. No reviewer should ask questions or make direct contact with any eligible firm regarding selection during process. Consider all factors in totality and consistently apply scoring rationale across all RFQs. 						
1. Primary Firm Location, Workload and Size (Maximum 10 points)						
#	Criteria	Example				F110-330 Key
a.	Proximity of Firm to Project Site	Range	Value	Actual	Score	Part 1 Section C, 14a (lead firm only)
	Roadway miles measured from Lead Firm's office to project site.	0 - 50 miles	5	20	5	
		50 - 100 miles	2	70	2	
		Over 100 miles	0	200	0	
b.	Amount of Fees / Contracts Awarded by Contracting Authority	Example #1 (A/E, C-A/E, CMA) (Max = 2 points)				F110-330 Key
		Range	Value	Actual	Score	
	Total revenues in past 2 years awarded by Contracting Authority.	< \$100K	2	\$20K	2	Part 2 Section 11a (lead firm only)
		\$100K - \$500K	1	\$170K	1	
		> \$500K	0	\$750K	0	
	Workload (\$) for A/E, C-A/E, CMA is based on value of fees, while workload for CMR & DB is based on total contracts awarded by the Contracting Authority.	Example #2 (CMR & DB) (Max = 5 points)				
		Range	Value	Actual	Score	
< \$10M		5	\$2M	5		
\$10M - \$50M		2	\$25M	2		
		> \$50M	0	\$60M	0	
c.	Number of Licensed / Relevant Professionals (Does not apply to CMR & DB)	Example (A/E, C-A/E) (Max = 3 points)				F110-330 Key
		Range	Value	Actual	Score	
	Number of licensed professionals in Lead Firm providing <i>primary</i> services required for project.	Small = < 3	Max = 3	2	1	Part 2 Section 9c, Column 1 (lead firm only)
		Med = 3 - 7		7	2	
Large = > 7		12		3		
2. Primary Firm Qualifications (Maximum 30-40 points, varies by type of service)						
#	Criteria	F110-330 Key				
a.	Project Management Lead	F110-330 Key				
	Consider education level or professional licenses attained, number of years experience in industry, number of years as project management lead, number of similar projects completed, past performance of specific person in managing scope/schedule/budget/quality.	Part 1, Section B (Main point of contact(s) identified) Part 1, Section D (Project Mgt. Lead identified in table) Part 1, Section E, Items 17 (Project Mgt. Lead resume identified) Part 1, Section E, Item 18-23 (Project Mgt. Lead's education/training, licenses, years experience, etc.) Part 1, Section F, Item 28 (possible performance statistics) Part 1, Section G, Item 30 (participation in example projects) Part 1, Section H (possible additional info)				
b.	Option 1: Project Design Lead (Does not apply to CMA & CMR)	F110-330 Key				
	Consider education level or professional licenses attained, number of years experience in industry, number of years experience as project design lead, number of similar projects completed, past performance of specific person in providing clients creative, effective and efficient design solutions to meet their needs.	Part 1, Section D (Design Lead identified in table) Part 1, Section E, Items 17 (Design Lead resume identified) Part 1, Section E, Item 18-23 (Design Lead's education/training, licenses, years experience, etc.) Part 1, Section F, Item 28 (possible performance statistics) Part 1, Section G, Item 30 (participation in example projects) Part 1, Section H (possible additional info)				

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#	Criteria					
b.	Option 2: Project Administration (Only applies to CMA & CMR)		F110-330 Key			
	Consider education level or professional accreditations attained, number of years experience in industry, number of years experience in specific administrative role, number of similar projects completed, past performance of specific staff in the effective, efficient and timely administration of project controls, processes, communication and providing quality deliverables.		Part 1, Section D (Project Admin. staff identified in table) Part 1, Section E, Items 17 (Project Admin. resumes identified) Part 1, Section E, Item 18-23 (Project Admin's education/training, licenses, years experience, etc.) Part 1, Section F, Item 28 (possible performance statistics) Part 1, Section G, Item 30 (participation in example projects) Part 1, Section H (possible additional info)			
c.	Technical Staff (Design and/or Construction)		F110-330 Key			
	Consider education level or professional accreditations attained, number of years experience in industry, number of years experience in specific technical role, number of similar projects completed, past performance of specific staff in developing quality construction documents, estimates and schedules, resulting in competitive/tight bids, lack of Bid Addenda, few RFIs, with minimal C.O.'s and claims.		Part 1, Section D (Technical staff identified in table) Part 1, Section E, Items 17 (Technical staff resumes identified) Part 1, Section E, Item 18-23 (Technical staff's education/training, licenses, years experience, etc.) Part 1, Section F, Item 28 (possible performance statistics) Part 1, Section G, Item 30 (participation in example projects) Part 1, Section H (possible additional info)			
d.	Construction Administration Staff		F110-330 Key			
	Consider education level or professional accreditations attained, number of years experience as lead construction administrator, number of similar projects completed, level of experience and authority to make decisions in field, experience effectively using Partnering on previous projects, past performance of specific person to identify and solve issues during construction.		Part 1, Section D (Construction Admin. staff identified in table) Part 1, Section E, Items 17 (Construction Admin. resumes identified) Part 1, Section E, Item 18-23 (Construction Admin's education/training, licenses, years experience, etc.) Part 1, Section F, Item 28 (possible performance statistics) Part 1, Section G, Item 30 (participation in example projects) Part 1, Section H (possible additional info)			
3. Key Consultant Qualifications (Maximum 10 - 20 points, varies by type of service)						
#	Criteria					
a.	Key Discipline Leads		F110-330 Key			
	Consider education level or professional licenses or accreditations attained, number of years experience in industry, amount experience in specific consultant role, number of similar projects completed, level of experience and ability to identify and solve issues during construction, past performance of specific staff performing similar role.		Part 1, Section D (Consultant roles identified in table) Part 1, Section E, Items 17 (Consultant resumes identified) Part 1, Section E, Item 18-23 (Consultant's education/training, licenses, years experience, etc.) Part 1, Section F, Item 28 (possible performance statistics) Part 1, Section G, Item 30 (participation in example projects) Part 1, Section H (possible additional info)			
b.	Proposed EDGE Certified Consultant Participation		F110-330 Key			
	Assign one point for every 2 percent increase in preconstruction stage compensation over the advertised EDGE participation goal. Participation must be comprised of consulting firm(s) and NOT the lead firm. A fully executed Statement of Intent to Contract and Perform with the relevant EDGE firms MUST be included in the Statement of Qualifications in order to receive points.		Part 1, Section C, Column 13 (box checked if EDGE certified firm) Part 1, Section D (EDGE role identified) Part 1, Section H (Statement of Intent to Contract and Perform) Part 2, Section 5b (EDGE status)			
4. Overall Team Qualifications (Maximum 10 points)						
#	Criteria	Example				F110-330 Key
a.	Previous Team Collaboration	Range	Value	Actual	Score	Part 1, Section F (Items 28-29 and Matrix) Part 1, Section H
	Majority of <i>key team members</i> collaborating equal half of the identified key members. <i>Typically key members are Project Mgt. Lead, Construction Admin., and Key Consultants.</i>	< 4 projects	1	2	1	
		4 – 6 projects	2	5	2	
> 6 projects		3	9	3		

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#	Criteria	Example				F110-330 Key
		Range	Value	Actual	Score	
b.	LEED Registered / Certified Project Experience	Registered	1	4	1	Part 1, Section F (Item 28 and Matrix) Part 1, Section H
	Key team members with knowledge and experience with implementing LEED. One point awarded if team members only have projects registered with USGBC. Assign lower point in value range if number of certified LEED projects are less than 4 total.	Certified	2 - 3	3	2	
c.	BIM Project Experience	Training & Knowledge	1	2	1	Part 1, Section F (Item 28 and Matrix) Part 1, Section H
	Team includes members with training/knowledge or experience in using BIM for: design, systems modeling/analysis, conflict identification, quantity take-offs, shop drawings. Preparation, construction administration or as-built drawings.	Direct Project Experience	3	1	3	
d.	Team Organization	F110-330 Key				Part 1, Section C, Lines a-f (firms within team identified) Part 1, Section D (attached table of organization) Part 1, Section H (possible additional information)
	Assign zero points if table is not submitted. If a table is submitted, a minimum of one point is earned. Consider clarity of communication lines, roles and responsibilities within team as well as between team and contracting authority. Main point(s) of contact should be identified in table or communicated how transition of leadership occurs between certain phases of project.					
5. Overall Team Experience (Maximum 30 points)						
#	Criteria	Example				F110-330 Key
a.	Previous Team Performance	F110-330 Key				Part 1, Section E, Item 23, Line 4 (possible client goals achieved) Part 1, Section F, Item 28 (possible client satisfaction/excerpt provided) Part 1, Section H (possible additional information – performance evaluations / letters of references) Other locations for information: Project files and office documents (previous public records) OAKS-CI (evaluations from other Contracting Authorities)
	Review performance evaluations of team members from previous projects completed by your organization or by others. Assess letters of references or excerpts quoted from past clients. Consider the specificity of the comments given and the individuals specifically praised. General satisfaction and level of service are evaluated for these points in distinction to other criteria scored in Section 5. The <i>date</i> of reference/evaluation should be a consideration of its current relevance.					
b.	Experience with Similar Projects / Delivery Methods	Example				F110-330 Key Part 1, Section E (Item 23, Line 4) Part 1, Section F (Items 28-29 and Matrix) Part 1, Section H Part 2, Section 10 b-c
		Range	Value	Actual	Score	
		< 4 projects	0 - 3	2	2	
		4 – 6 projects	4 - 6	5	5	
> 6 projects	7 - 10	9	9			
c.	Budget and Schedule Management	F110-330 Key				Part 1, Section E, Item 23, Line 4 (possible performance statistics) Part 1, Section F, Item 28 (possible performance statistics) Part 1, Section H (possible additional information)
	Consider past performance as demonstrated within the submitted example projects and/or provided by identified projects completed in last 24 months. This can be evidenced by the variance between owner's budget, design estimate and bids (low/avg.) received, and variance between owner's initial schedule, bid schedule, and contract completion date for same projects. If specific RFQ project demands a tight schedule, analyze submitted information to determine if they have experience in meeting similar tight schedules. Additional confidence in the submitted data can be gained if they include client contact information for those projects.					
d.	Knowledge of Ohio Capital Improvements Process	Example (Both PM and CA has at least one project completed using state's standard documents)				F110-330 Key Part 1, Section E (Item 23, Line 4) Part 1, Section F (Item 24 and Matrix) Part 1, Section H Part 2, Section 11 (Item c)
	Consider number of projects completed using the State of Ohio Standard Requirements by assigned project management lead(s) and construction administrator(s). Assign lower points in value range if number of projects is in lower half of criteria range and vice versa. If one or both of these assigned project leads do not have direct experience from previous project examples, consider discounting the total number of qualified projects by 2 points.	Range	Value	Actual	Score	
		< 4 projects	0 - 1	3	1	
		4 – 6 projects	2 - 3	5	2	
> 6 projects		4 - 5	9	5		