



Oklahoma Statute Title 61, § 62 describes the statutory requirements for the selection of consultants and construction managers for construction projects for all State agencies. The Office of Management and Enterprise Services, Capital Assets Management, Construction and Properties is mandated by statute, to monitor and approve the selection process.

The following is a guideline for agencies to follow (read each step before you proceed).

- ☐ Step 1: Using Agency
 - Requests copy of Consultant List from **Construction and Properties** (CAP) (Example Letter "A" attached).
 - Requests a **CAP** representative be assigned, if approved, to chair and be voting member of Screening Committee and Interview Committee (combined with Example Letter "A" attached). A specific Project Manager may be requested.
 - Submit scope of the proposed project and request approval from **CAP**. *Request for Letters of Interest* to Consultants shall include the following elements: (Example Letters "B" and "C" attached).
 - Description and Scope of Project;
 - Estimated construction cost;
 - Anticipated starting date;
 - Completion date;
 - Certification of Funds Available;
 - Closing Date for *Letters of Interest*;
 - Any additional information may be requested to assist in evaluating, see examples.
- ☐ Step 2: If **Construction and Properties**:
 - Approves the scope of project required for project, a Consultant List is sent to the Using Agency; or
 - Rejects the scope of project (*Request for Letters of Interest*) required for project, an explanation for rejection is provided by **CAP**, and the Using Agency may revise and resubmit the scope of project required for project.
- ☐ Step 3: Using Agency mails, or emails each Consultant on the mailing list a copy of the *Request for Letters of Interest*.
- ☐ Step 4: Using Agency receives *Letters of Interest*, CAP Form M254 and CAP Form M255 from Consultants. Additional information may be submitted with the CAP Forms. CAP Forms may **not** be altered and the most recent version must be used.
- ☐ Step 5: Using Agency sends **CAP** the list of firms that submitted *Letters of Interest* and requests any additional information, i.e. Vendor Evaluations, from each responding consultant's file.
- ☐ Step 6: **Construction and Properties**:
 - Verifies the registration information of the list of firms that submitted *Letters of Interest* with the CAP Registration Database;
 - Sends to Using Agency any additional information from each responding consultant's file.
- ☐ Step 7: Using Agency designates a "Screening Committee" to evaluate the submitted *Letters of Interest* and CAP Forms.
 - Screening Committee uses CAP Form M101 *Consultant Screening Evaluation* to evaluate firms;
 - Evaluators score each category for the respective firm(s); then
 - Rank each firm from highest score to lowest, starting at one (1), if a firm scores are equal, they have the same rank, i.e. firm A scores 33 and firm B scores 34 and firm C scores 33 – the ranks would be 1 for firm B, 2 for both firm A and firm C (see Instructions of CAP Form M101 *Consultant Screening Evaluation*);
 - The firm with the greatest number of highest ranking (1's) would be the one selected; see Instruction on CAP Form M103 *Evaluations Rank Tally Sheet*.
 - Evaluation of firms must be done by all evaluators concurrently and record copies of score sheets shall be provided to the **CAP** Representative.
 - **CAP** Representative completes CAP Form M103 *Consultant Evaluation Rank Tally* to determine the three (3) to five (5) firms to interview.
- ☐ Step 8: Using Agency sends letter, or emails to firms selected for interviews (Example Letters "D" and "E" attached). Letter should identify:
 - Date, time and location of interview;
 - Time allowed for each interview;
 - Copy of Interview Evaluation Criteria, Matrix, if applicable, and infilled CAP Form M102 *Consultant Interview Evaluation*; and
 - Any other supplemental evaluation criteria or requirements required for the Interview, see examples.
- ☐ Step 9: Using Agency designates "Interview Committee" to interview firms:
 - Interview Committee uses CAP Form M102 *Consultant Interview* to evaluate;
 - Interview committee ranks firms according to results of CAP Form M102 *Consultant Interview*;

- Evaluators score each category for the respective firm(s); then
 - Rank each firm from highest score to lowest, starting at one (1), if a firm scores are equal, they have the same rank, i.e. firm A scores 33 and firm B scores 34 and firm C scores 33 – the ranks would be 1 for firm B, 2 for both firm A and firm C. (see Instructions of CAP Form M102 *Consultant Interview Evaluation*);
 - The firm with the greatest number of highest ranking (1's) would be the one selected; see Instruction on CAP Form M103 *Evaluations Rank Tally Sheet*.
- Evaluation of firms must be done by all evaluators concurrently and record copies of score sheets shall be provided to the CAP Representative.
 - **CAP** Representative completes CAP Form M103 *Evaluations Rank Tally Sheet* to determine the “winning” firm to begin negotiations.

- ☐ Step 10: Using Agency sends a report to **CAP** with ranking of Consultants and documentation from Steps 1 through 9 of the selection procedures. If the Using Agency prefers that the CAP Project Manager completes this task, all documents should be forwarded to the assigned CAP Project Manager from each step required.
- ☐ Step 11: **Construction and Properties** sends Using Agency a confirmation letter that report was received.
- ☐ Step 12: **Construction and Properties** and Using Agency meet with selected Consultant to negotiate consulting fees and obtain an acceptable Letterhead Proposal.
- ☐ Step 13: Using Agency sends a completed CAP Form M701 *Project Requisition* to CAP with copy of approved, signed Purchase Order for the Consultant service(s) and accepted Letterhead Proposal from Consultant.
- ☐ Step 14: **Construction and Properties**:
 - Completes Consultant Contract and forwards to selected Consultant for signature.
 - Forwards contract to Using Agency for signature after receipt of signed Contract and insurance documents from Consultant.
 - Upon receipt of the signed contract from the Using Agency, executes Contract and distributes to all parties.

Clarification of Requirements for Solicitation and Selection of Multiple Consultants

To select consultants for multiple projects under one solicitation, the following is required for compliance with Oklahoma statutes and CAP Rules:

- List of individual projects, with project descriptions, must be attached to the solicitation letter. The description must state the project name, general description, anticipated cost, desired completion date, source of funding and any other information that would assist a consultant in determining their interest in the project. (580:20-3-4 (a))
- Solicitation letter must request that responders indicate the project(s) for which they are interested in providing services.
- When screening the applicants, at least two firms must be shortlisted and interviewed for each of the listed projects. (580:20-3-6 (c)). One interview session with a shortlisted firm may be used to address the specific project(s) for which a firm was shortlisted.
- General Provisions:
 - Solicitations for multiple projects are allowed for related, logical groupings of minor projects. Any individual project where the projected cost exceeds \$2.5M will require a separate solicitation.
 - Project groupings may include projects of a similar nature funded in a three (3) year budget cycle; minor work with multiple assignments at a single project site, not to exceed three years in duration; or other groupings approved by the State Construction Administrator.
 - All multiple project solicitations must have a specific list of anticipated projects attached. Non-specific projects such as “repair and maintenance” are acceptable when all work assignments are initiated within three years of the original contract date.
 - Specific projects listed in the solicitation but not initiated within three years of the contract award date will require a new solicitation.

EXAMPLE LETTER "A"

January 1, 2020

OMES/CAM/CAP
Attn: Consultant Contracting Officer
P O Box 53448
Oklahoma City, OK 73152-3448

Dear Contracting Officer:

The University of Oklahoma wishes to initiate the process required to select an architectural firm to provide professional services in connection with the design of new educational and administrative space on the Norman Campus to house the University's newly created Honors College. The preliminary estimate of the anticipated total cost for the project is approximately \$2 million. Funds for the project are to be provided from proceeds and from private funds and/or the sale of revenue bonds by the University.

The selected architectural consultant will initially assist the University in developing the building program and a project feasibility study. Additionally, the consultant will provide the professional services required to produce the design and the contract documents after approval of the feasibility study.

If approved, please provide updated list of Consultant (A/E) firms registered with the State and are eligible to be considered for this project as well as assigning a representative of Construction and Properties to serve as our chair and evaluating member of the screening committee and the interview committee for the project referenced above..

Please call me if you need additional information about this project.

Sincerely,

Michael K. Moorman, AIA
Director

EXAMPLE LETTER "B"
(SINGLE PROJECT SOLICITATION)

May 1, 2005

RE: CAP Solicitation #####AE

Ladies and Gentlemen:

The University of Oklahoma intends to select an architectural firm to provide professional services in connection with the renovation of space at the University of Oklahoma Schusterman Center in Tulsa to create new classrooms in Building 4W and an instructional laboratory for the College of Pharmacy. The project will also include necessary code and life safety improvements. The estimated total project cost is approximately \$750,000 to \$1,000,000. It is anticipated that funding will come from a combination of University sources.

The selected architectural consultant will provide the professional services required for detailed space planning, production of the design and contract documents and administration of the construction contract. The consultant selected for this project will be required to maintain a minimum of \$500,000 in Professional Errors and Omissions insurance coverage.

We anticipate that the selection of a consultant will be completed within ninety (90) days and the programming and design phase started thirty (30) days thereafter. It is the intent of the Using Agency to occupy the facilities in the fall of 2006.

If your firm is interested in providing the needed professional services, please respond in writing to me prior to the close of business on May 20, 2005. Your response must include unaltered CAP Forms 254 and 255 (Forms are available at <https://omes.ok.gov/services/construction-and-properties>) and should contain the following basic information: (1) a statement outlining the experience of your firm with projects of this scope and type, which provides specific examples including the names of the projects, the dates completed and client references; (2) the names and qualifications of staff members that will be assigned to the project should your firm be selected; (3) other consultants you would propose to include on your team; and (4) the ability of your firm to commence work immediately upon selection. Please provide five copies of all materials submitted. The submission **must** clearly be marked with the CAP Solicitation Number on any Cover and Cover Letter.

By offering to provide services, the Consultant certifies that they, and any proposed subcontractors, are in compliance with 25 O.S. §1313 and participate in the Status Verification System. The Status Verification System is defined in 25 O.S. §1312 and includes but is not limited to the free Employment Verification Program (E-Verify) available at www.dhs.gov/E-Verify.

If you have questions about the scope of work, the schedule or other aspects of the project, please contact Mr. Wilton Berry at (405) 271-2305.

Sincerely,

Michael K. Moorman
Director

Cc: Susan Torres, Director, Construction and Properties

* Please note: Submitting a CAP Form 254 with this solicitation will **not** automatically renew the Consultant registration with Construction and Properties. Each firm is responsible for verifying that its registration with CAP is current (<https://omes.ok.gov/services/construction-and-properties>, scroll down to the *Consultant Registration and Design-Build Lists* to find the most current lists). Firms may renew up to 6 days before the date the Solicitation is due. Firms must register annually by submitting an updated CAP Form 254 to Construction and Properties.

EXAMPLE LETTER "C"
(SINGLE AWARD, MULTI-YEAR SOLICITATION)

25 April 2015

RE: CAP Solicitation #####AE

Subject: Airport Engineering Firm, Request for Letters of Interest for Clinton-Sherman (KCSM) Airport International Plan

Ladies and Gentlemen:

The Oklahoma Space Industry Development Authority (OSIDA) intends to select an airport engineering firm to provide professional services in connection with our long-range Airport Improvement Plan as required by the FAA in a single award, multi-year (initial year with four (4) one-year period renewal options). Our airport is Clinton-Sherman (KCSM), formerly known as Clinton-Sherman AFB, located in Burns Flat, Oklahoma.

The selected firm is expected to provide the professional services required for detailed planning and installation of airport equipment to include, but not limited to, the following:

1. Runway and Taxiway Lighting Replacement or Upgrades;
2. Approach Lighting;
3. Runway Overrun Replacement;
4. Runway and Taxiway Striping;
5. Taxiway Shoulder Replacement;
6. Installation and/or Upgrades of Approach Light Systems;
7. Pavement Rehab on Runway, Taxiway and Parking Ramps (including Joint Seal Repair and Rubber Removal);
8. Airport operations and Costs – Case Study Analysis.

We anticipate the selection of an engineering firm to be completed within forty-five (45) days.

If your firm is interested in providing the needed professional services, please respond in writing to me prior to the close of business on May 14, 2015. Your response must include unaltered CAP Forms 254 and 255 (Forms are available at <https://omes.ok.gov/services/construction-and-properties>) and should contain the following basic information: (1) a statement outlining the experience of your firm with projects of this scope and type, which provides specific examples including the names of the projects, the dates completed and client references; (2) the names and qualifications of staff members that will be assigned to the project should your firm be selected; (3) other consultants you would propose to include on your team; and (4) the ability of your firm to commence work immediately upon selection. Please provide five copies of all materials submitted. The submission must clearly be marked with the CAP Solicitation Number on any Cover and Cover Letter.

This selection will be made IAW Title 61, Oklahoma Statutes 62.

If you have any questions about the scope of work, schedule, or other aspects of the possible projects, please contact Mr. Nicola Borghini at (580) 562-3500.

Sincerely,

Operations Manager, Deputy Executive Director
Oklahoma Space Industry Development Authority

EXAMPLE LETTER "D"
(SINGLE PROJECT SOLICITATION)

March 3, 2020

RE: CAP Solicitation #####AE

XYZ Construction
123 Any Street
Oklahoma City, OK 73000

Dear Mr. Constructor:

Thank you for your interest in our construction project. The initial screening has been completed and your firm has been selected for further review in an interview evaluation.

Interviews will be held on Monday, March 16, 2020, at Construction and Properties, Will Rogers Office Building (2401 N. Lincoln Boulevard), Suite 214, Oklahoma City, Oklahoma. We have allowed for 25 minutes of presentation in response to the questions listed on the evaluation form and an additional 10 minutes for questions. Your presentation is scheduled to begin at 10:00 a.m. Presentations have been randomly scheduled with no reference to results from the initial screening process. You may call me at (405) 271-2305, if you have questions or would like to make arrangements to view the building site prior to the interview.

Sincerely,

Michael K. Moorman
Director

EXAMPLE LETTER "E"
(SINGLE AWARD MULTI-YEAR SOLICITATION)

17 May 2015

RE: CAP Solicitation #####AE

Memorandum for: See Distribution

Ladies and Gentlemen,

Thank you for your interest in our single award, multi-year (initial year with four (4) one-year period renewal options) airport engineering consultant firm. The initial screening has been completed and all firms have been selected to proceed to an interview evaluation.

The interview will be held on **Tuesday, May 22, 2015**, at the Division of Capital Assets Management, Construction and Properties, Will Rogers Office Building (2401 N. Lincoln Blvd.), **ROOM 216**, Oklahoma City, Oklahoma. We have allowed for 25 minutes of presentation in response to the questions listed on the evaluation form and an additional 10 minutes for questions. Your presentation **Start Time** is noted below. Presentations have been randomly scheduled with no reference to results from initial screening process. You may call me at (580) 562-3500, if you have any questions.

Please acknowledge the receipt of this notice.

Sincerely,

Mr. Nicola Borghini
Operations Manager, Deputy Executive Director
Oklahoma Air & Spaceport, OSIDA
Office: 580-562-3500
Cell: 580-309-3223
nico.borghini@okspaceport.state.ok.us

3 encls.

1. Project Management Team Matrix document
2. Interview Evaluation Criteria
3. CAP Form M102 Consultant Interview Evaluation Form

DISTRIBUTION:

Finalists:

We Fly Engineers (1000 Interview)
Never Grounded Consulting Engineers (1050 Interview)
Airborne Associates (1300 Interview)
Snodgrass (1350 Interview)

OMES:

David Mihm, RA, DBIA
Kelly Thompson

(SINGLE AWARD MULTI-YEAR SOLICITATION)

Project Management Team Matrix

Individual Name		Oklahoma License No./ Registration No.	No. of recent, relevant (large/commercial airport) projects w/substantial personal participation w/in past 5 years w/similar pavement/ramp structures	No. of Years' experience with Public Use/DOD joint use airports	American Association of Airport Executives (AAAE) Certification (Mark with X for YES)	Primary Point of Contact* (Mark with X for YES)
Principal in Charge						
Project Manager						
Project Architect						
Airport Engineer						
Electrical Engineer						
Civil Engineer						
Construction Administrator/Inspector						

NOTE: This matrix may be used to evaluate the firm across multiple categories.

* Primary point of contact is to be defined as the individual with whom the client will be speaking with on a day-to-day basis to facilitate progress of the project.

(SINGLE AWARD MULTI-YEAR SOLICITATION)

Interview Evaluation Criteria

The following criteria will be used to rate firms by the Interview Committee. It is recommended that the consultant presentation and handouts focus on presenting **dominant** information that allow the evaluators to rate firms with high scores. If consultants choose to use PowerPoint, it is requested that slide packages be handed out at the beginning of the presentation. There will be three (3) evaluators, so three (3) sets will be required.

A. Project Experience.

1. Present one completed recent and relevant project that represents most of the listed services expected by OSIDA per the Request for Letters of Interest. Discuss the challenges during design and construction, and document positive owner satisfaction results.
2. Present one (1) to three (3) airport projects that best represent your firm's primary focus with respect to asphalt or concrete surface structures. Discuss the challenges during design and construction, and document positive owner satisfaction results.

B. Project Management Team.

1. The enclosed "Project Management Team Matrix" form will be evaluated. The purpose of this form is to present the core team that your firm plans to utilize on the OSIDA projects. Use of this form is mandatory.
2. What are your firm's greatest strengths with respect to airport engineering?
3. Provide an org chart representational of the primary stakeholders (FAA, State Contracting Authority, and OSIDA), including your firm personnel and roles. Highlight or Bold the Primary point of contact.

C. Project Control.

1. Present your teams approach to standard construction observation/inspection services; and your firm's ability to provide additional enhanced construction observation/inspection. Does your firm believe in in-house or consulting construction observation/inspection services? Why?
2. Present one (1) to three (3) problems encountered in schedule, construction cost estimating and/or quality control and describe how it was resolved to all party's satisfaction.
3. What type response time should be expected from your firm in response to our facility's needs should immediate action be required of your firm? Does your firm provide a mechanism for immediate response?
4. Based upon the services expected by OSIDA, discuss your firm's ability to meet construction windows through design and bid document preparation? What is your average turn-around time to complete projects from initial study to bidding?
5. How does your firm ensure that the client obtains the most qualified contractor within the State's "lowest responsible" bid process?

D. Design Approach.

1. What type of role does your firm take when presented with a poor client-driven direction for a project? How does your firm avoid the danger or trap of recommending more project than afforded by the client's budget?
2. How does your firm handle cost-control and budgeting? Do you have in-house ability to produce "Operational Cost Analysis" comparing like-size airports?
3. How does your firm ensure that your firm's bid documents are in conformance with both the FAA requirements and State adopted Building Codes?



Owner's Representative (Consultant) Interview Evaluation Form

Office of Management & Enterprise Services ■ Capital Assets Management ■ Construction and Properties

Evaluation Scale: 10 – Excellent 8 – Good 6 – Acceptable 4 – Unacceptable (requires narrative)

(Name) _____ For Using Agency: _____

(Date) _____ CAP Solicitation #: _____

Evaluation Criteria \ Firm Name and Location					
A. Project Experience 1. Recent relevant project 2. Firms primary focus project(s) a. Describe challenges b. Document positive Owner satisfaction					
B. Project Management Team 1. Team Matrix 2. Greatest strengths 3. Org chart 4. Primary point of contact					
C. Project Control 1. Approach to Observation/Inspection a. In-house or consultant 2. Project(s) representing problems with schedule, cost simulating, and/or quality control. a. Document solutions and positive Owner satisfaction 3. Response time a. Immediate Response Team mechanism? 4. Ability to work with Airport Construction window a. Average turn-around time for projects? 5. Vetting of bidders to determine "lowest responsible"?					
D. Design Approach 1. Approach to poor client-driven project a. Restrained design 2. Cost-control and budgeting through design a. Operational Cost Analysis ability 3. Document conformance with FAA and State requirements					
Total Score:					
Rank:					

As an evaluator, I hereby swear or affirm, under penalty of perjury, that I have conducted these evaluations in a fair and unbiased manner to the best of my abilities and that the scoring contained herein reflect my own evaluations.

(Signature)