

Construction Services

450 Columbus Boulevard
Hartford, CT 06103

Department of Administrative Services

Selection and Bidding
Manual





Important Notice Of Changes

DAS Selection And Bidding Manual July 07, 2007

The DAS "Selection and Bidding Manual" dated July 07, 2007 has been recently posted on the CT DAS/DCS Website and replaces the DAS "Selection and Bidding Manual" dated December 22, 2005. The Selection and Bidding Manual has been revised and expanded and now includes:

1. **Revisions to Section 2, "Qualifications Based Selection (QBS) For Major Project Consultant Contract (Formal), (For Architectural/Engineering & Professional Consultant Services)".**
2. **A New "Section 3, Qualifications Based Selection (QBS) For Design/Build Screening, (For Design/Build Screening For Competitive Sealed Proposal Selection)".**
3. **A New "Section 6, Competitive Sealed Proposal Selection (For Design/Build (D/B) Best Value Based Selection).**
4. There have been several noteworthy changes. The significant changes are:
 - 4.1 The Manual has been expanded to include new QBS Design/Build Procedures for Shortlisting Design/Builder Teams of Contractors and Design Professionals. It also includes a brief description of the Competitive Sealed Proposal Selection Procedures For Design/Build (D/B) Best Value Based Selection that follows the QBS Design/Build Screening.
 - 4.2 The Manual now uses new terminology;
 - 4.2.1 **"Formal Qualification Based Selection"** has been renamed **"Qualifications Based Selection (QBS) For Major Project Consultant Contract, (For Architectural/Engineering & Professional Consultant Services)"**. This new terminology has been used throughout Section 2 of the Manual.
 - 4.2.2 **"On-Call Qualification Based Selection"** has been renamed **"Qualifications Based Selection (QBS) For Task Order Contracts, (For Architectural/Engineering & Professional Consultant Services)"**.
 - 4.2.3 **"Informal Qualification Based Selection"** has been renamed **"Qualifications Based Selection (QBS) For Special Contracts, (For Architectural/Engineering & Professional Consulting Services)"**.
 - 4.3 The revised **Section 2, "Qualifications Based Selection (QBS) For Major Project Consultant Contract** includes a revised procedure for rating a Consultant's past performance. A Consultant's past performance evaluations on DAS Contracts still remains the primary rating factor. However, other considerations are also used to evaluate and rate a Consultant's past performance.
 - 4.4 The Consultants **"Qualifications Based Selection (QBS) For Major Project Consultant Contract (Formal) QBS Submittal Booklet Requirements"** has not been revised or edited. Consulting Firms must still follow these requirements.

The manual has been fully edited with minor changes made through out. Therefore, it is strongly recommended that any prior copies of this manual and the submittal requirements be discarded. **All new submittals should be based solely on the current edition of this manual.**

End



0305 Selection and Bidding Manual

Page 2 of 54

Section	Title	Page
1.0	General Requirements	7
1.1	Overview	7
1.2	Project Delivery System Options	7
1.3	Selection And Bidding Procedures	9
1.4	Consultants, General Contractors, And Design Builders Affidavits	10
1.5	State Agency Official Or Employee Certification	11
1.6	Communications And Code Of Conduct	11
2.0	Qualifications Based Selection (QBS) For Major Project Consultant Contract (Formal) (For Architectural/Engineering & Professional Consultant Services)	15
2.1	Overview	15
2.2	QBS Project Initiation, PM Assignment, and Planning	15
2.3	QBS For Major Project Consultant Contracts (Formal) - Procedure Flow Chart	17
2.4	Preparing The Request For Qualifications (RFQ) Legal Notice And (RFQ) Advertisement	18
2.5	Screening Criteria Category Point Table	19
2.6	Selection Criteria Category Point Table	19
2.7	Publication: RFQ Legal Notice (Newspaper)	20
2.8	Posting: RFQ Advertisement On State Websites	20
2.9	QBS Submittal Booklet Requirements	21
2.10	Review Of QBS Submittal Booklets For Compliance: Reasons For Deficient Submittal Designation	21
2.11	Reasons For An Ineligibility Designation	22
2.12	Assignment to Serve as Screening or Selection Panel Member	22
2.13	Screening Panel Meeting: Screening Panel Members Responsibilities	23
2.14	Computing Final Screening Scores And Parity Points	24
2.15	Shortlisted Firms Notifications	25
2.16	Collection Of Firms Past Performance Data For Selection	25



Section	Title	Page
2.0	Qualifications Based Selection (QBS) For Major Project Consultant Contract Contracts (Formal) (continued)	-
2.17	Selection Preparation: Selection Panel Member Responsibilities	26
2.18	Selection Panel Responsibilities: Day Of The Selection	27
2.19	Selection Interview Presentations (For Selections That Require An Interview)	28
2.20	Connecticut Code Expertise Points	29
2.21	Conclusion Of Each Individual Selection Rating Score Meeting	29
2.22	Conclusion Of All Selection Rating Periods	30
2.23	Preparation Of Selection Recommendation	30
2.24	Conditional Selection By The DAS Commissioner	31
2.25	Selection Results Notifications	31
2.26	QBS Records	32
2.27	Debriefing	32
2.28	Fee Negotiation And Contract Award	32
3.0	Qualifications Based Selection (QBS) For Design/Build Screening (For Competitive Sealed Proposal Selection)	34
3.1	Overview	34
3.2	D/B Project Initiation, Designation, PM Assignment, And QBS D/B Screening	34
3.3	QBS D/B Screening and Competitive Sealed Proposal Selection Procedures	35
3.4	QBS For Design/Build Screening - Procedure Flow Chart	37
3.5	Preparing the Request For Qualifications (RFQ) Legal Notice And (RFQ) Advertisement	38
3.6	Preparation Steps For The RFQ Advertisement And Legal Notice	38
3.7	QBS D/B Screening Criteria Category Point Table	39
3.8	Publication: RFQ Legal Notice (Newspaper)	40
3.9	Posting: RFQ Advertisement On State Websites	40
3.10	QBS Submittal Booklet Requirements	40



Section	Title	Page
3.0	Qualifications Based Selection (QBS) For Design/Build Screening (For Competitive Sealed Proposal Selection) (continued)	-
3.11	QBS Submittal Booklet D/B Supplement Requirements	41
3.12	Review Of The QBS Submittal Booklets, QBS Submittal Booklet - D/B Supplement, All Supplements, And/Or Attachments For Compliance: Reasons For A Deficient Submittal Designation	41
3.13	Reasons For An Ineligibility Designation	42
3.14	Assignment To Serve As QBS D/B Screening Panel Member	42
3.15	QBS D/B Screening Panel Meeting: Screening Panel Members Responsibilities	42
3.16	Computing Final QBS D/B Screening Scores	44
3.17	D/B Shortlisted Firms Notifications	44
3.18	QBS Records	45
3.19	Debriefing	45
3.20	Key D/B Milestone Schedule For Competitive Sealed Proposals (Best Value Based Selection)	45
4.0	Qualifications Based Selection (QBS) For Task Order Contracts (On-Call) (For Architectural/Engineering & Professional Consultant Services) <i>Winter 2007</i>	-
5.0	Qualifications Based Selection (QBS) For Special Contracts (Informal) (For Architectural/Engineering & Professional Consulting Services) <i>Spring 2007</i>	-
6.0	Competitive Sealed Proposal Selection (For Design/Build (D/B) Best Value Based Selection) <i>Summer 2007</i>	-
7.0	Competitive Sealed Bidding For Major Projects (Formal) (For Lowest Responsible and Qualified Bidder Determination) <i>Winter 2008</i>	-
8.0	Competitive Sealed Bidding For Small Projects (Informal) (For Lowest Responsible and Qualified Bidder Determination) <i>Spring 2008</i>	-
9.0	Emergency Procurement <i>Summer 2008</i>	-
10.0	Glossary of Terms	48
11.0	Appendix of Referenced Documents	52



1.0

General Requirements



1.0 General Requirements

1.1 Overview

The State of Connecticut Department of Administrative Services (DAS) Division of Construction Services (DCS) has developed the selection and bidding procedures in this Manual to aid DAS and the public in understanding how contracts are awarded on an impartial, equitable, and rational basis. The procedures are intended to insure the integrity of all selection and bidding procedures and to define the duties and responsibilities of the various participants. In some instances, the procedures may be stricter than the legislation requires. **Deliberate manipulation of contracts to avoid compliance or deviation from these procedures is not allowed.**

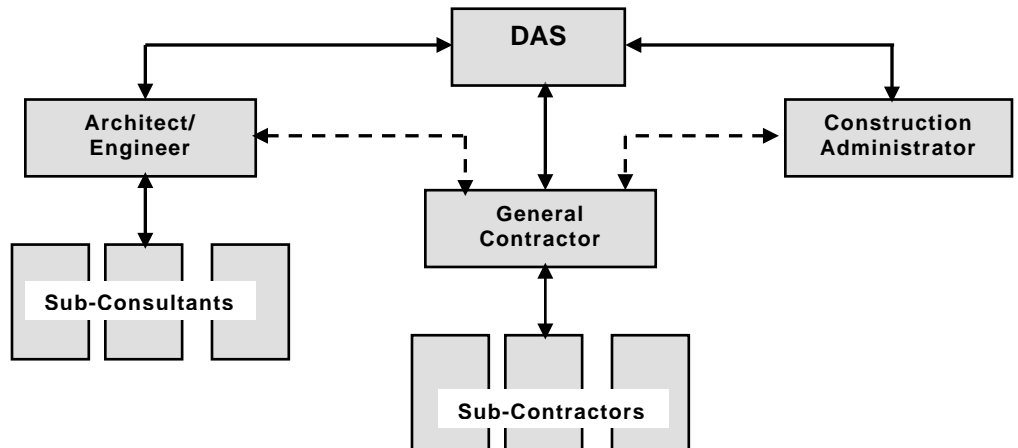
1.2 Project Delivery System Options

At the Project Development Stage, DAS and the User Agency jointly develop the scope, and budget, and determine the appropriate project delivery system for a specific project. The choice of the appropriate project delivery system is of prime importance because it enables DAS to achieve project goals such as innovation, quality, schedule performance, cost conformance, and sustainability. The following are the DAS project delivery systems options available for the construction of all infrastructure projects:

1.2.1 Design/Bid/Build:

This is the traditional option that is utilized to deliver approximately 90% of all DAS projects. Architects/engineers and professional consulting contract services are selected through the applicable **Qualification Based Selection (QBS) Procedures For Major Project Consultant Contracts** (Formal), **Task Order Consultant Contracts** (On-Call) or **Small Project Consultant Contracts** (Informal) and a contract is awarded a consultant to develop design and construction documents that meet the goals, scope, and budget of DAS. A Construction Administrator can be selected through the same procedures to represent the DAS during Construction.

- Based on the completed construction documents, a general contractor is selected through the applicable **Competitive Sealed Proposal Procedures For Major Construction Contracts** (Formal) or **Small Construction Contracts** (Informal) where the responsible general contractor with the lowest qualified bid (cost) is awarded the contract to build the project.





1.2.2 Design/Build (D/B):

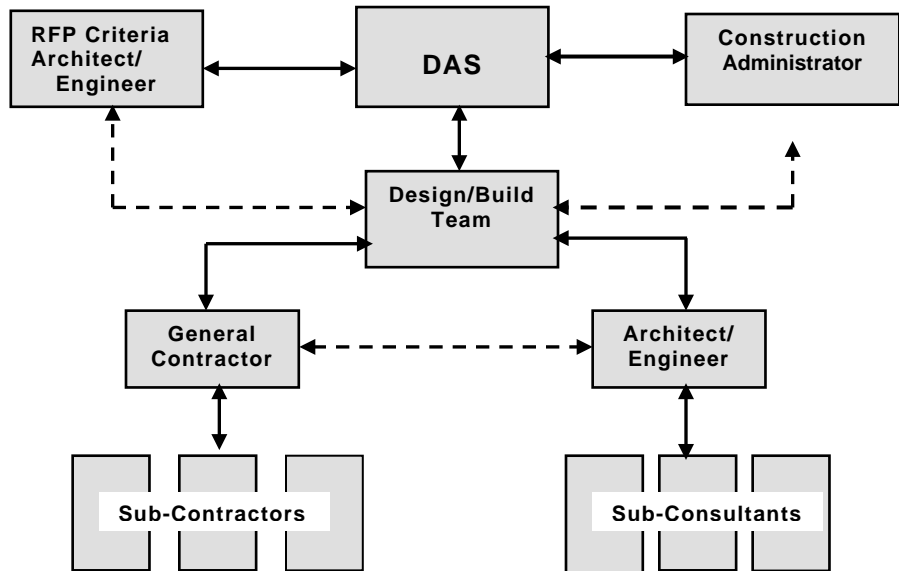
1.2.2.1 This option is used to deliver less than approximately 5% of DAS projects. It can only be utilized when it meets the following feasibility criteria and the DAS Commissioner designates it a **Total Cost Basis Project**. The following are the six (6) types of feasibility criteria for a D/B Project:

D/B Project Best Value Based Selection Feasibility Criteria	
1.0	The project has a clearly defined scope, design basis, and performance requirements;
2.0	The project is free from complicated issues such as utility conflicts, right-of-way acquisition, hazardous materials, wetland and environmental concerns, or other such issues;
3.0	The project has room for innovation in the design and construction;
4.0	The project is not an emergency project or a project that has overly tight time constraints;
5.0	The project involves a significant design effort and the potential to save cost and time in the design.
6.0	The project's "Qualitative Criteria" and "Total Cost Criteria" rating scores are published in the Request For Proposal RFP.

1.2.2.2 When the DAS Commissioner designates a **Total Cost Basis Project** it must utilize the following Screening and Selection Procedures.

Qualification Based Selected (QBS) Screening And Competitive Sealed Proposal Selection:

- Design/Build Teams (General Contractor and Professional Service Consultant Architects/Engineers) compete in a **QBS Design/Build Screening** and a **Competitive Sealed Proposal Selection** based on DAS's RFP.
- The final design/build team is selected through the **Competitive Sealed Proposal Selection** procedure. Based upon the selection procedure utilized a Design/Builder will be selected on their "**Best Value**" Proposal and contracted to design and build the Facility.





1.3 Selection And Bidding Procedures

Within the various project delivery systems are several different types of selection and bidding procedures that can be utilized for soliciting and evaluating Qualifications, Proposals, and Bids for procurement of services and construction of the projects.

The following are the Selection and Bidding Procedures available for use for the award of all DAS professional service and construction contracts:

1.3.1 QBS For Major Project Consultant Contracts (Formal) - CGS §4b-55 through 4b-61:

For Architectural/Engineering & Professional Consultant Services

Project means any state program requiring consultant services if:

- The cost of such services is estimated to exceed fifty thousand dollars or, in the case of a constituent unit of the state system of higher education, the cost of such services is estimated to exceed three hundred thousand dollars,
and
- The construction costs in connection with such program are estimated to exceed five hundred thousand dollars; or, in the case of a constituent unit of the state system of higher education, other than The University of Connecticut, the construction costs in connection with such program are estimated to exceed two million dollars.

1.3.2 Competitive Sealed Proposal Selection For Design/Build - CGS § 4b-24(4):

For Competitive Sealed Proposal Selection

- Utilized for projects designated by the Commissioner to be accomplished on a “**Total Cost Basis**” with a single contract with a private developer which may include such project elements as site acquisition, architectural design, and construction.

1.3.3 QBS For Task Order Consultant Contracts (On-Call):

For Architectural/Engineering & Professional Consultant Services

- **Constituent Unit of the State System of Higher Education:** Anticipated Consultant services fee is \$300,000 or less
and
- Anticipated construction cost is \$2,000,000 or less.
- **All Other User Agencies:** Anticipated consultant service fee is \$50,000 or less
and
- Anticipated construction cost is \$500,000 or less.

1.3.4 Competitive Sealed Bidding For Major Project Construction Contracts (Formal) - CGS §4b-91 Through 4b-95:

For Lowest Responsible And Qualified Bidder Determination

- Anticipated construction is estimated to cost more than \$500,000.

1.3.5 Competitive Sealed Bidding for Small Project Construction Contracts (Informal) - CGS §4b-91 through 4b-95:

For Lowest Responsible And Qualified Bidder Determination

- Anticipated construction is estimated to cost \$500,000 or less.

1.3.6 Competitive Sealed Proposal Selection - CGS § 4b-24(4):



For D/B Best Value Based Selection

- For projects designated by the Commissioner to be accomplished on a **Total Cost Basis** with a single contract with a private developer which may include such project elements as site acquisition, architectural design and construction.

1.3.7 Emergency Condition - CGS §4b-52(c):

For Specific, Designated Projects

- Anticipated Project Costs Exceed \$500,000 then Governor's written consent is required.
- Anticipated Project Costs less than \$500,000 then a DAS written consent is required from the Commissioner.

1.4 Consultants, General Contractors, And Design/Builders Affidavits

1.4.1 State Of Connecticut, Department Of Administrative Services (DAS) – Certifications And Affidavits For Consultants, General Contractors, And Design/Builders

Various types of certifications and affidavits are required to be submitted by consultants, general contractors, and design/builders by DAS policy, CT statutes, and Executive Orders issued by Governor Rell. These affidavits and certifications address ethics and integrity in the contracting process.

"Unofficial" DAS Certification and Affidavit forms are included in various DAS publications as samples.

"Official" DAS Affidavit and Certification forms and instructions can be accessed from the DAS/DCS Website (www.ct.gov/dcs) as required for Qualification Based Selections, Competitive Sealed Bids, and Competitive Sealed Proposals.

The RFQ Web Advertisement alerts all potential consultants and design/builders to the Certification Requirements, various types of affidavits, and other supplemental legal document requirements, and provides web access directions to the required forms posted on the DAS/DCS website.

More information concerning the Notice of Certification Requirements, various types of affidavits and other supplemental legal documents can be found by going directly to the DAS/DCS website page at www.ct.gov/dcs. No forms, other than those posted on the DAS/DCS website page, shall be used by a consultant or design/builder.

1.4.2 Notification of Compliance Requirements for Affidavits and Certifications

The **RFQ Legal Notice 116** and **RFQ Web Advertisement 117** shall alert all potential consultants and design/builders to the submittal requirements for Affidavits and Certifications.

All advertisements will include the following language:

NOTE:

Failure to the submit QBS Submittal Booklets (including required affidavits and certifications) by the above Deadline, with the required contents and format, and at the designated location will result in the Offeror being deemed Non-Responsive for consideration on this Contract.



1.4.3 Questions Concerning Affidavits

Questions concerning the certifications, affidavits, and other supplemental legal document requirements can be directed to the DAS Legal Services Division at 860-713-5680.

1.5 State Agency Official Or Employee Certification

1.5.1 State of Connecticut Department of Administrative Services (DAS) – Certification by Agency Official or Employee Authorized to Execute Contracts

The State statutes require that a DAS **Certification by Agency Official or Employee Authorized to Execute Contracts 118** must be signed by the state agency official or employee who is authorized to execute the Contract if the specific contract exceeds \$50,000.

The State Agency Official or Employee Certification states:

“I herby certify that the selection of the person, firm or corporation for [this contract] was not the result of any of the following:”
Collusion;
Giving of a gift or the promise of a gift;
Compensation;
Fraud;
Inappropriate influence from any person.

1.5.2 Selection Panel Member And Observer Certification Language

Selection Panel members and all Agency Observers shall also complete a **Certification by Agency Official or Employee Authorized to Execute Contracts 118** and/or **Selection Observer Certification 119** as applicable.

Both Certifications include the language below, to be followed by the signature of the Panel member or Agency Representative Observer(s).

Official: I, _____ ; am authorized to execute the attached contract on behalf of the (Agency Name). I hereby certify that the selection of the person, firm or corporation for the attached large state contract was not the result of collusion, the giving of a gift, or the promise of a gift, compensation, fraud or inappropriate influence from any person.

Observer: I certify that I have not communicated information with any contractor prior to the advertisement of the above stated DAS contract and Project number and will not communicate information through notification of the final selection that is not available to the general public and which would result in a Firm receiving information that is not available to other firms. I further certify that I have not attempted to influence the selection of a particular Firm.

1.6 Communications And Code Of Conduct

1.6.1 No Conflicts Of Interest

All individuals selected to serve on a selection panel or review bids shall evaluate their relationship with the Offerors and ensure that they have no potential conflict of interests.



1.6.2 No Conflicts Of Interest (Continued)

Conflicts Of Interest Include:	
1.0	a financial interest in a company that will be submitting a proposal or is being selected or is bidding for a contract;
2.0	a financial interest in a company that is part of a team submitting a proposal or a company that is a sub consultant or subcontractor for the project;
3.0	a close family member or fiancé or fiancée who has a financial interest in a company that is submitting a proposal or bid,
or	
4.0	having a financial interest in a company that is part of a team that is trying to obtain a contract, or is a subcontractor or sub consultant for a contract that is being sought.

See section 1.6.7 for the procedure should an individual believe that there is or could be a conflict of interest.

1.6.3 No Gifts

Individuals who participated directly, extensively and substantially in a selection or bid process shall not accept any gift, including, but not limited to, favors and services from a person or firm seeking to do business with DAS.

1.6.4 No Influence

There shall be no actions taken by any officials or individuals, either within or outside DAS, to attempt to influence the impartial and independent actions of a Selection Panel. If this does occur or a DAS employee learns of such an impropriety, the employee is directed to contact DAS's Integrity Officer.

1.6.5 Fair Talk (a/k/a "No Talk")

All participants in any selection or bidding process, including user agency representative(s), shall not communicate with any potential Offeror prior to, during, or upon conclusion of the entire Selection or Bidding procedure, with the exception of information necessary to complete the administrative steps of the selection process.

During the submittal period and throughout the entire selection or bidding process, all inquiries on a particular project or contract bidding and selection procedure should be referred to the DAS QBS Unit or, for questions concerning competitive sealed bidding, to the DAS QBS Unit, Room 478, 165 Capitol Avenue, Hartford, CT 06106.

1.6.6 Questions And Answers Or Addenda

General QBS Procedure Questions: Contact the DAS QBS Unit person named in the *RFQ Legal Notice 116* and *RFQ Web Advertisement 117* in writing (email acceptable).



1.6.7 Questions And Answers Or Addenda (Continued)

Specific Contract Questions: Contact the DAS QBS Unit named in the *RFQ Legal Notice 116* and *RFQ Web Advertisement 117* in writing (email acceptable). All questions, answers, and/or addenda, as applicable, will be posted on the DAS website, faxed, and/or e-mailed to all Offerors. Questions may be deferred to the pre-interview site tour meeting, if applicable to the selection for this Contract.

Note:

DAS responses to requests for more specific contract information than is contained in the *RFQ Legal Notice 116* and *RFQ Web Advertisement 117* shall be limited to information that is available to all Offerors and that is necessary to complete this QBS process. The request must be received at least five (5) business days prior to the advertised response deadline.

1.6.8 Notification And Debriefing With Unsuccessful Offerors

Offerors inquiring as to their status will be directed to wait for formal notification via letter from DAS. This notification will identify who to contact for follow-up. Designated DAS managers or an authorized designee are exclusively responsible for discussing any aspect of a Selection or Bidding process with an interested Offeror after a Selection or Bidding process is concluded, including conducting a debriefing with Offerors who were not successful.

1.6.9 Recusal Option

If a conflict of interest could arise by a state official's or employee's participation on a Selection panel or in the bidding process, such official, and employee shall recuse him or herself from the panel. Conflicts of interests include, but are not limited to those conflicts identified in 1.4.1. "Financial interests" include, but is not limited to, the receipt of a promise of gifts, favors, services or anything of monetary value from such company or person acting on behalf of such company.

A state official or employee who believes a conflict of interest may exist should immediately consult with DAS's Integrity Officer. To avoid tainting the selection process, the state official or employee shall not tell any others about the possible conflict of interest unless directed to do so by the DAS Integrity Officer.

End

General Requirements



2.0
Qualification Based Selection (QBS)
For
Major Project Consultant Contracts (Formal)
(For Architectural/Engineering and Professional Consultant Services)



2.0 QBS For Major Project Consultant Contracts (Formal)
(For Architectural/Engineering And Professional Consultant Services)

2.1 Overview

In accordance with the requirements of CGS § 4b-57 whenever consultant services are required, the commissioner shall invite responses from such firms by advertisements. The required advance notice shall indicate the manner of submission, and conditions and requirements of, such responses.

In the case of a Major Project - Consultant Contract (Formal) (See Section 1 of this Manual), the responses received shall be considered by a selection panel. The panel shall select from among those responding no fewer than three firms, which it determines in accordance with criteria established by the commissioner are most qualified to perform the required consultant services. The selection panel shall submit a list of the most qualified firms to the commissioner for his consideration unless fewer than three responses for a particular contract have been received, in which case, the panel shall submit the names of all firms who have submitted responses.

Table 2.1 Examples Of Major Project Consultant Contracts	
Standard Fixed-Fee Architect's Contract	Construction Administration (CA) Contract
Standard Fixed-Fee Engineer's Contract	CA Contract (Design Phase/Construction Phases)
Architect's Contract For Studies	CA Contract (Design Phase)
Engineer's Contract for (studies)	Environmental Performance Contract

2.2 QBS Project Initiation, PM Assignment, And Planning

QBS Project Initiation, PM Assignment, And Planning Steps	
Step	Task
1.0	<p>Project Initiation: A User Agency shall submit a User Agency Project Initiation Request/B100S 115, with all of the required supporting project/contract initiation documentation, to the DAS Chief Architect and the Special Work And Training (SWAT) Team. If the anticipated type of consultant service, fee and construction cost have been correctly completed by the User Agency then the DAS Chief Architect shall meet with the DAS Project Director of Project Management and appropriate supervisory staff to determine assignment of the project / contract to a DAS PM.</p> <p>Note: The DAS SWAT Team is comprised of the DAS Chief Architect, Chief Engineer, Director of Project Management, and two Supervising Project Managers that are selected by the Chief Architect. The Chief Architect shall serve as the chair of the Team.</p> <p>The SWAT Team shall periodically convene meetings to review, evaluate, and review and resolve various DAS Office of Design & Construction business issues.</p>

Note:
During Step 1 the DAS the Chief Architect, DAS Director of Project Management and appropriate supervisory staff shall determine if an Interview is required for the Selection of the Firm or this Contract.

2.0	<p>QBS Planning: The DAS (PM) assigned to the project shall conduct a QBS Planning Meeting with the User Agency to review project scope, cost, schedule, etc. to obtain critical project specific information for the preparation of the RFQ Legal Notice 116 and RFQ Web Advertisement 117.</p>
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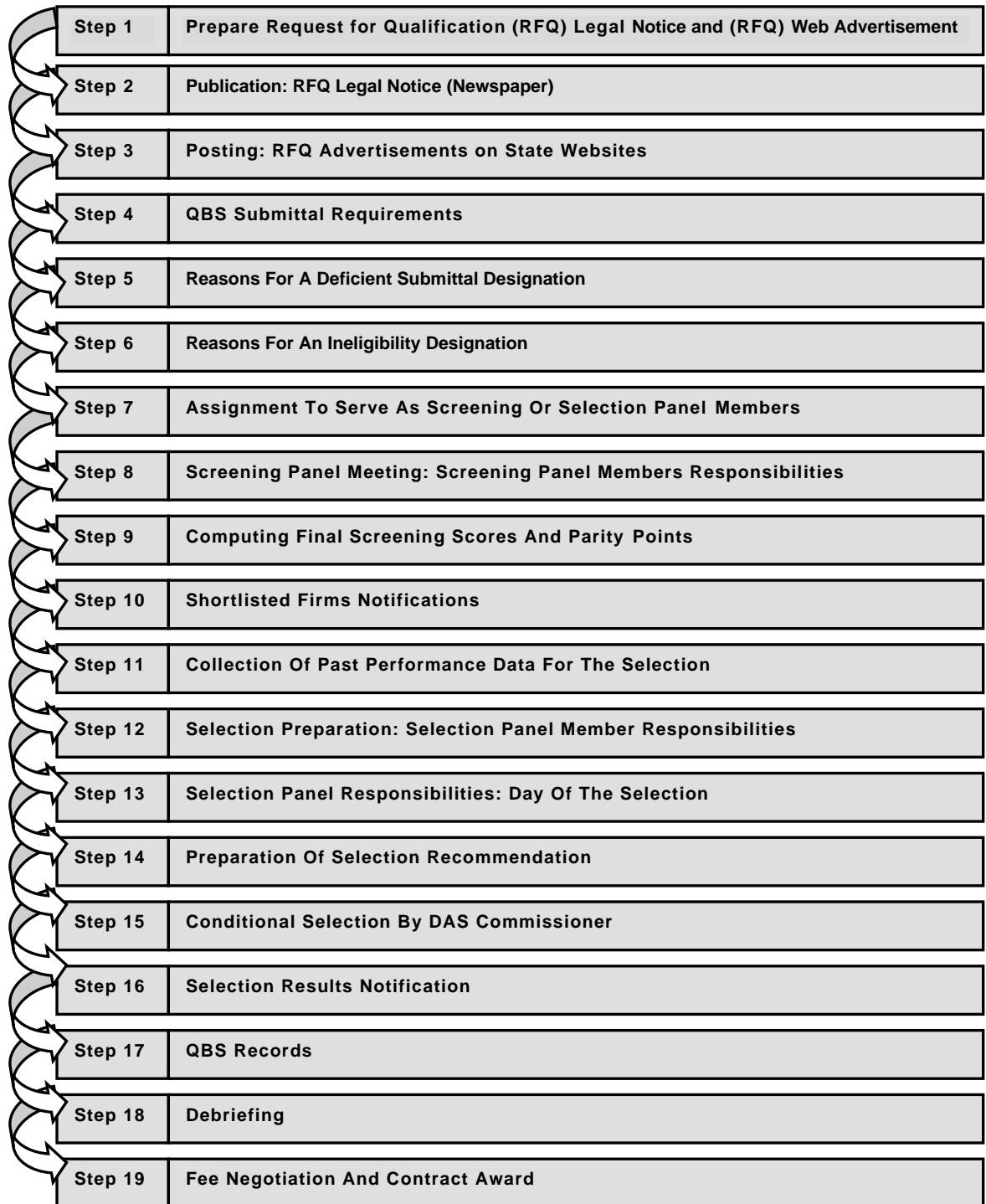


2.2 QBS Project Initiation, PM Assignment, And Planning(Continued)

QBS Project Initiation, PM Assignment, And Planning Steps (Continued)	
Step	Task
3.0	QBS Planning Meeting Agenda:
3.1	Obtain critical project specific information applicable to the Request For Qualifications Advertisement for this Contract.
3.2	Make any adjustments to standard rating points for the screening criteria and/or the Selection Criteria within the allowable point range (see the screening and selection point tables below).
3.3	According to what is allowed by statute, the head of User Agency shall designate representative(s) to serve on the Screening and Selection Panels. The Agency may also designate up to two (2) observers for the Selection and Interview if it is determined that an Interview is required for the Selection of a Firm for this Contract. Such observers cannot vote and must be present for the entirety of all Selections and Interviews if it is determined that Interviews are required for the Selection of a Firm for this Contract. However if Selections Interviews are required for the Selection of Firm for this Contract the observers(s) cannot participate in the Q & A following the presentations or any discussion by the Selection panel concerning the selection process and must fill out a Selection Observer Certification 118 .



2.3 QBS For Major Project Consultant Contracts (Formal) - Procedure Flow Chart





2.4 Preparing the Request For Qualifications (RFQ) Advertisement

The DAS PM assigned to the project shall process the RFQ Advertisement by utilizing the following steps:

PM Preparation Steps For The RFQ Advertisement And Legal Notice	
Step	Task
1.0	Complete RFQ Web Advertisement 117 .
2.0	Submit the completed RFQ Web Advertisement 117 to their DAS ADPM for review and approval.
3.0	Complete RFQ Transmittal RFQ Transmittal To QBS Unit 120 and submit to their DAS ADPM for review and approval.
4.0	Upon approval by the DAS ADPM and the DAS PM shall transmit RFQ Web Advertisement 117 and RFQ Transmittal To QBS Unit 120 to the DAS QBS Unit by both hard copy (with signatures) and electronic copy- for each contract.
5.0	The DAS QBS Unit shall insert the information from the approved RFQ Web Advertisement 117 into a RFQ Legal Notice 116 .
6.	Upon inserting the above information the DAS QBS Unit shall then transmit these documents via RFQ Transmittal To Commissioner 121 to the Commissioner for his signature on the RFQ Legal Notice 116 .
7.0	The RFQ Legal Notice and the RFQ Web Advertisement(s) shall be transferred to Procurement via the RFQ Transmittal To Procurement 122 (multiple projects may be transmitted in one RFQ Legal Notice).

Note:

The DAS QBS Unit will verify that the content of the **RFQ Web Advertisement 117** conform to the minimum content requirements. The DAS QBS Unit will (dependant upon schedule) insert the advertisement date and due date. An RFQ Legal Notice transmitted to the Commissioner for his signature may be a composite summary of multiple projects.

2.4.1 Rating Point System: The DAS (PM) must indicate on the **RFQ Transmittal to QBS Unit 120** one of the following Rating Point systems to be utilized for the specific contract.

2.4.1.1 Standard Rating Points: The Screening and/or Selection Criteria Categories have standard rating points (as indicated in the tables below).

2.4.1.2 Approved Adjusted Rating Points: The Standard Rating Points are allowed to be adjusted only for if the Contract meets the following conditions:

2.4.1.2.1 Contract is for Consultant services of an unusual nature;

2.4.1.2.2 Written permission from all of the following: DAS Deputy Commissioner, DAS Chief Architect, DAS Chief Engineer, and DAS Director of Project Management:

2.4.1.2.3 The Approved Adjusted Rating Points within the Allowable Point Range as indicated in the tables below.



2.5 Screening Criteria Category Point Table

Example 2.5.1 Screening Criteria Category Table

Criteria Number	Screening Criteria Categories	Standard Rating Points	Allowable Point Range	Approved Adjusted Rating Points
1	Experience with Work of Similar Size and Scope as Required for this Contract	35	35-45	35-45
2	Organizational / Team Structure	30	25-35	25-35
3	Past Performance Data	20	20 <i>(Not Adjustable)</i>	20 <i>(Not Adjustable)</i>
4	Partnering Experience	15	10-20	10-20
Maximum Total Points per Screening Panel Member		100	100	100

Example 2.5.2 Screening Criteria Standard Point Value Calculations Table

Criteria Number	Screening Criteria Categories (Standard Rating Points)	Standard Grade Point Values			
		A = 100%	B = 80%	C = 60%	F = 0%
1	Experience with Work of Similar Size and Scope as Required for this Contract	35	28	21	0
2	Organizational / Team Structure for this Contract	30	24	18	0
3	Past Performance Data	20	16	12	0
4	Partnering Experience	15	12	9	0

2.6 Selection Criteria Category Point Table

Example 2.6.1 Selection Criteria Category Table

Criteria Number	Selection Criteria Categories	Standard Rating Points	Allowable Point Range	Approved Adjusted Rating Points
1	Problem Solving Capabilities	30	25-35	25-35
2	Organizational / Team Structure for this Contract	25	20-30	20-30
3	Past Performance	20	20 <i>(Not Adjustable)</i>	20 <i>(Not Adjustable)</i>
4	Approach to the Work Required for this Contract	15	10-20	10-20
5	Contract Oversight Capabilities	10	5-15	5-15
Maximum Total Points Per Selection Panel Member		100	100	100



0305 Selection and Bidding Manual



Example 2.6.2 Selection Criteria Standard Point Value Calculations Table:

Criteria Number	Selection Criteria Categories	Standard Grade Point Values			
		A = 100%	B = 80%	C = 60%	D = 40%
1	Problem Solving Capabilities	30	24	18	12
2	Organizational / Team Structure for this Contract	25	20	15	10
3	Past Performance	20	16	12	8
4	Approach to the Work Required for this Contract	15	12	9	6
5	Contract Oversight Capabilities	10	8	6	4

NOTE:

A DAS PM shall utilize the **RFQ Transmittal To QBS Unit 120** to seek approval for the adjustment of the Standard Rating Points in the Screening Criteria Point Table and the Selection Criteria Point Table for a specific Contract. The Standard Rating Points are adjustable within the Allowable Point Range, but the adjustment of the Standard Rating Point weight for Past Performance Data is **not adjustable** for either the Screening or Selection Criteria Categories.

2.7 Publication: RFQ Legal Notice (Newspaper)

The **RFQ Legal Notice 116** contains a statement that all **QBS Submittal Booklets Requirements 124** and all required supplements, attachments, etc. must be submitted at the designated location and the deadline for submitting an offer. Any Firm's QBS Submittal Booklet and QBS submittal material such as required supplements, attachments, etc. received after the scheduled deadline shall result in the Firm's submittal being deemed deficient for this contract and their QBS submittal material shall be not be considered for this contract and shall be returned to the Firm. The Firm shall receive a **Deficient Submittal Letter 128**.

Legal Notice (Newspaper) Statutory Requirements
In accordance with CSG § 4b-57: "Whenever consultant services are required by the commissioner in fulfilling his responsibilities under section 4b-1, and in the case of each project, the commissioner shall invite responses from such firms by advertisements inserted at least once in one or more newspapers having a circulation in each county in the state. The commissioner shall prescribe, by regulations adopted in accordance with chapter 54, the advance notice required for, the manner of submission, and conditions and requirements of, such responses."

2.8 Posting: Advertisements On State Websites

In accordance with the Governor Rell's Executive Order No. 3 (12-15-04), and the DAS **Advertising Publication Standards 123**, the **RFQ Web Advertisement 117** shall be posted on the DAS "State Contracting Portal" Website. The DAS "State Contracting Portal" Website shall act as the single electronic portal for purposes of posting all contracting opportunities with state agencies in the executive branch and all higher education agencies and institutions. The **RFQ Web Advertisement 117** also shall be posted on the DAS/DCS Website and shall be sent to various trade and professional associations, which may post it on their respective Websites. The **RFQ Web Advertisement 117** shall contain more detailed project information than the **RFQ Legal Notice 116** and shall provide interested parties with a link to the legal submittal requirements and instructions to obtain the requisite forms, including the affidavit forms.

State Advertisement Websites	
DAS Website: (State Contracting Portal)	http://www.biznet.ct.gov/SCP_Search/Default.aspx?AccLast=1
DAS/DCS Website:	www.ct.gov/dcs



2.9 QBS Submittal Booklet Requirements

Interested Firms shall send their QBS Submittal Booklets to the DAS QBS Unit as specified in the **RFQ Web Advertisement 117** and **QBS Submittal Booklet Requirements 124**. All QBS Submittal Booklets shall include, but not be limited to, the following:

Types Of QBS Submittal Booklet Requirements		
Division	Division Title	Document Name
1	Table of Contents	-
2	Letter of Interest	-
3	QBS Email Registration	QBS Email Registration 125
4	Credentials and Insurance	-
5	Affidavits	-
6	CT Code Expertise & Site Proximity	-
7	CT 330 Part I	CT330 Part I 126
8	CT 330 Part II	CT330 Part II 127

Each Firm must comply with all submittal requirements, as described in the **RFQ Legal Notice 116**, **RFQ Web Advertisement 117** and the **QBS Submittal Booklet Requirements 124**.

2.10 Review Of The QBS Submittal Booklets For Compliance: Reasons For A Deficient Submittal Designation

All QBS Submittal Booklets shall be reviewed by the DAS QBS Unit staff for compliance with the **RFQ Web Advertisement 117** and **QBS Submittal Booklet Requirements 124**. All QBS Submittal Booklets must be submitted at the designated location by the deadline. Any QBS Submittal Booklet received after the scheduled closing time will be returned to the Firm and will not be reviewed. There will be no exceptions.

Firms who fail to submit the QBS Submittal Booklets with all of required information or do not submit this information in the specified format at the designated location by the deadline will be deemed a "Deficient Submittal" for this contract and receive a **Deficient Submittal Letter 128**. The reasons include but are not limited to the following:

Reasons For A Deficient Submittal Designation
QBS Submittal Booklet Late Submission.
QBS Submittal Booklet Format Deficiency.

Note

QBS Submittal Booklets and submittal material can be deemed a "Deficient Submittal" at any point during the QBS process.

2.11 Review Reasons For An Ineligibility Designation

The reasons A Firm may be deemed "Ineligible" for a specific project include, but are not limited to, the following.



2.11 Review Reasons For An Ineligibility Designation (Continued)

Reasons For An Ineligibility Designation
Firms are currently allowed the Maximum Number of Selections and Contracts (2.12.1).
Affidavits not submitted or correctly completed as per website page instructions.
Firm is not properly licensed in the State.
Firm is not properly insured.
Firm has been disqualified.

Firms deemed "Ineligible" shall receive a **Not Eligible Letter 129**.

Note:

A firm can be found not eligible at any point during the QBS process.

2.11.1 Maximum Number Of Selections And Contracts:

Maximum Number Major Project Contracts And Selections	
Contract Parameter	Type Of Contract
Contract Selection Consultant Contract Not Executed for One (1) Year or More	Major Project – Consultant Contracts Four (4) Contracts In Any Combination
Contract Executed Consultant Received No Notice to Proceed for One (1) Year or More	
Contract Executed Notice to Proceed Suspended for One (1) Year or More in any Project Phase	
Contract Executed In Any Project Phase Through Substantial Completion	

2.12 Assignment To Serve As Screening Or Selection Panel Members

2.12.1 All submittals shall be evaluated according to the DAS QBS process and procedures. A Screening Panel will review properly submitted QBS Submittal Booklets and establish a list of firms to be Selected by a separate Selection Panel. For each contract, there shall be a separate Screening Panel and a separate Selection Panel of five (5) voting members each. Each Screening and Selection Panel member shall receive a **QBS Panel Member Email Notification 130**. The DAS Screening Panel Chair shall be the first DAS PM assigned to the screening panel via the random Selection procedure by the DAS QBS Unit (or his/her substitute).

2.12.2 Each Panel will consist of five (5) persons as follows:

There shall be established within DAS *State Construction Services Selection Panels* which shall consist of five (5) members. Four (4) of such members shall be appointed by the DAS Commissioner, shall serve only for deliberations involving the project for which such members are appointed, and shall be current or retired employees of DAS. The remaining member shall be appointed by the head or acting head of the user agency and shall serve only for deliberations involving the project for which such member is appointed.



- 2.12.3 Connecticut Health and Education Facilities Authority (CHEFA) Projects shall consist of five (5) persons as follows:

There shall be established within DAS *Connecticut Health and Education Facilities Authority Construction Services Panels* which shall consist of five (5) members. Three (3) of such members shall be appointed by the DAS Commissioner, shall serve only for deliberations involving the project for which such members are appointed and shall be current employees of DAS. The remaining members shall be appointed by the head or acting head of the user agency and shall serve only for deliberations involving the project for which such members are appointed.

2.13 QBS D/B Screening Panel Meeting: Screening Panel Members Responsibilities

- 2.13.1 **Mandatory Screening Panel Meeting:** There will be a mandatory screening panel meeting for all screening panel members that will be coordinated and facilitated by the DAS PM.

NOTES:

- The DAS PM will only serve as a facilitator for **Task #1** of the screening panel meeting, but is not a voting member.
- The DAS PM must leave the Screening Panel Meeting at the conclusion of **Task # 1**.
- The DAS QBS Unit shall designate the Screening Panel Chair.
- If any member of the Screening is absent from the Screening Panel Meeting they must complete their score sheet and submit it to the QBS Unit as soon as possible.

- 2.13.2 **QBS D/B Screening Panel Tasks:** At this mandatory meeting the screening panel members shall have the responsibility to accomplish the following tasks:

Task No. 1	
Screening Panel Members Receive Overview Of The Following:	
1.0	Project Specific Information (Overview by the DAS PM and User Agency Representative).
2.0	Any Unique Or Technical Issues (Overview by the DAS PM and/or Applicable Expert).
3.0	Screening Panel Member Rating Sheet Guidelines 131 (Overview by a DAS Process Management Unit Staff).
Task No. 2	
Screening Panel Members Shall Review All Of The Following Screening Documents:	
1.0	RFQ – Web Advertisement;
2.0	QBS Submittal Booklets;
3.0	Past Performance Data shall Include a review of all of the following information: <ul style="list-style-type: none"> 3.1 QBS Submittal Booklet, CT330 Part I, Section F: Example Projects Which Best Illustrate Proposed Team's Qualifications, Items 20 through 24 - Projects relevant to this Contract in Scope, Size, Cost, and etc. 3.2 QBS Submittal Booklet, CT330 Part II. 3.3 Firm's Letter of Interest. 3.4 Reference Letters (as available). 3.5 Consultant Performance Evaluations (as available).
4.0	Screening Panel Member Rating Sheet 131

NOTES:

- The DAS QBS Unit Staff Member must leave the screening panel meeting after delivering the screening documents and must not be present during **Task # 2**.
- None of the above screening documents shall be allowed to be removed from DAS for review at any time prior to or during the screening stage.



2.13.3 QBS D/B Screening Panel Tasks:

Task No. 3 – Evaluate/Rate All Submittals:
1.0 Screening Panel Members shall utilize the Screening Panel Member Rating Sheet 131 and the Screening Panel Member Rating Sheet Guidelines 131 to rate the following Screening Criteria for all submittals:
Screening Criteria Categories
Experience With Work Of Similar Size And Scope as Required for this Contract
Organizational / Team Structure for this Contract
Past Performance-Data
Partnering Experience

NOTES:

1. Panel members must rate the submittal qualifications of each individual firm against the screening guideline rating criteria (point values modified as applicable).
2. Panel members must not rate individual submittal qualifications in comparison to each other.

2.13.4 The DAS Screening Panel chair shall collect each **Screening Panel Member Rating Sheet 131** from each panel member for computation by the DAS QBS Unit.

2.14 Computing Final Screening Scores And Parity Points

2.14.1 Computations:

Task 1: Compute The Final Scores:
A member of the DAS QBS Unit staff shall compute the final scores of each Firm.
Task 2: Computation Verification:
Another member of the DAS QBS Unit staff, not involved in the original screening computation, shall independently check the original screening computation for accuracy. The completed Screening Ratings Calculation Spreadsheet 132 shall be signed by both DAS QBS Unit staff members.

2.14.2 Parity Points:

In an effort to open the process and increase competition, "Parity Points" shall be automatically awarded to any Firm who has not been selected for services with DAS in the last five (5) years unless such firm has not done business with DAS because of debarment, federal indictment, etc. The Firm shall receive a maximum of five (25) parity points added to the sum total of their final calculated Screening Rating Point score. This is a 5% increase in the total available sum of the screening points.

Note:

Consultants do not get any parity points if they have past Consultant Performance Evaluations over 5 years old that indicate a poor performance.



2.15 Shortlisted Firms Notifications

2.15.1 Summary of Results and Approval: Prior to notification to all Firms, the DAS QBS Unit will prepare a list for the DAS Commissioner of firms the Screening Panel recommends for Selection shortlist. The shortlist must be reviewed by the DAS Deputy Commissioner of the Office of Design & Construction and then a **Commissioner Screening Shortlist Approval Memorandum 133** must be submitted to DAS Commissioner for approval. No fewer than four (4) firms will be recommended for selection unless the recommendation is accompanied by a written justification from the Supervisor of the QBS Unit, and approved by the DAS Commissioner.

2.15.2 Selection Interview Invitation: The DAS QBS Process Unit shall send a **Selection Interview Invitation Letter 134** for Selections that have an Interview:

Selection Interview Invitation Information
Selection Interview Invitation Confirmation
Selection Interview Schedule Location, Date, & Time
Selection Interview Format
Site Visit - Location, Date, & Time (if applicable)
Review Location and List of other Relevant Project Reference Documents (if applicable)

NOTES:

- For Selections that require an Interview the DAS PM will have a set of the “relevant project reference documents” available at DAS for the short-listed Firms to review at DAS anytime prior to the Selection Interview.
- Questions and answers shall be handled pursuant to the direction provided in Section 1.4.5 Questions and Answers or Addenda.

2.15.3 Deficient Submittal: The DAS QBS Process Unit shall send a **Deficient Submittal Letter 128** (mail, fax or email) to Firms containing the reason(s) why their submittal was deemed deficient.

2.15.4 Not Shortlisted: The DAS QBS Process Unit shall send **Not Shortlisted Letter 135** (mail, fax or email) to Firms notifying them that they have not been shortlisted for a Selection and an Interview if it is determined that an Interview is required for the Selection of a Firm for this Contract. The letter shall offer the firm an opportunity for a debriefing once the final contract is negotiated and signed.

2.16 Collection Of Past Performance Data For The Selection

2.16.1 Collection of Past Performance Data:

The DAS PM is responsible for collecting all short-listed firm’s Past Performance Data for consideration at the Selection Meeting and an Interview if it is determined that an Interview is required for the Selection of a firm for this Contract as follows:



2.16.1 Collection of Past Performance Data: (Continued)

Step	PM Past Performance Data Collection Tasks
1.0	Facilitate the obtainment of two (2) phone references at least one (1) week prior to the selection in accordance with the Phone Reference Check Questionnaire Guidelines 136 , for each Shortlisted Firm that does not have any existing DAS Phone Reference Check Questionnaires on file in the DAS Performance Evaluation Files in Room 478. The focus of the phone reference checking will be on obtaining feedback on a limited list of critical indicator questions of a firm's performance using a structured telephone interview process.
2.0	PM shall collect all existing DAS Consultant Performance Evaluations of all Shortlisted Firms from the DAS Consultant Performance Evaluation Files in Room 478.
3.0	PM shall collect all existing DAS Phone Reference Check Questionnaires 136 for all Shortlisted Firms from the DAS Performance Evaluation Files in Room 478 that are less than two years old.
4.0	PM shall collect four (4) copies of each Firm's CT330 Part I and II or five (5) copies of each Firm's CT330 Part I and II for CHEFA Selection [i.e. one (1) copy of each Firm's CT330 Part I and II for each Selection Panel Member] from the QBS Unit in Room 478.

Notes:

- Do not check new phone references for any Firm that has existing DAS Phone Reference Check Questionnaires on file in the DAS Performance Evaluation Files in Room 478 for a project of similar size and scope unless the reference is than more than two years old.
- All new **Phone Reference Check Questionnaires 136** shall be placed in the Firm's DAS Performance Evaluation File Folder in Room 478 after the selection.
- The DAS QBS Unit staff Member shall deliver the Firm's Performance Evaluations to the DAS PM/Chair for the Selection prior to the mandatory pre-selection panel meeting for review by the Selection Panel.

2.17 Selection Preparation: Selection Panel Member Responsibilities

2.17.1 Site Conference/Site Tour (When applicable to specific project):

Attendance For Site Conference/Site Tour
Attendance is Mandatory for PM & User Agency Representative
Attendance is Optional for Selection Interview Panel Members
Attendance is Optional for All Shortlisted Firms.

2.17.1.1

Site Conference/Site Tour – State Ethics and Statutes: In accordance with the requirements of ethics statutes and regulations of the State of Connecticut this will be the **ONLY** opportunity for Shortlisted Firms to visit the site and discuss the Project with DAS and the User agency.



2.17.2 Document Review: All Selection Panel Members shall review the following materials for each Shortlisted Firm, at DAS, prior to the Selection and an Interview if it is determined that an Interview is required for the Selection of a Firm for this Contract:

Selection Panel Member Document Review
RFQ Web Advertisement
Shortlisted Firms' QBS Submittal Booklets
Shortlisted Firms' DAS Past Performance Evaluations
Shortlisted Firms' Existing Phone Reference Check Questionnaires
Shortlisted Firms' New Phone Reference Check Questionnaires

2.18 Selection Panel Members Responsibilities: Day Of The Selection

2.18.1 Mandatory Pre-Selection Panel Meeting: On the morning of the day of the scheduled Selection or there will be a mandatory meeting of the Selection Panel. The DAS PM for the specific contract shall facilitate the Pre- Selection Panel Meeting with assistance from the DAS Process Management Unit to review the following meeting agenda items. The DAS PM shall chair the Selection and Interviews if it is determined that an Interview is required for the Selection of a Consultant for this Contract and leads all deliberations in accordance with the **Selection Chair Guidelines 138**.

Pre-Selection Panel Meeting Agenda
<p>Selection Protocols: The DAS Process Management Unit shall provide brief training on how to conduct the Selection and Interview if required for the Selection of a Firm for this Contract, clarifying the format and the roles of attendees, as well as how to apply the Selection Rating Sheet Guidelines 138 to objectively evaluate each firm.</p> <p>The Chair shall also receive the Selection Sequence Schedule 139, Selection Rating Sheet 138, Selection Rating Sheet Guidelines 138, and the Selection Sign-in Sheet 140.</p>
<p>Project Overview: The DAS PM/Chair and User Agency Representative shall present any unique project specific issues to the Selection Interview Panel members.</p>



2.18.1 Mandatory Pre-Selection Panel Meeting: (Continued)

Pre-Selection Panel Meeting Agenda (Continued)	
1.0 Review Past Performance Data:	The Selection Panel Members must consider <u>all</u> available Past Performance Data to determine a Rating Score for each Firm's Performance Criteria No. 3 Past Performance Data:
2.0 QBS Submittal Booklet - CT330 Part1:	
2.1	Review CT330 Part 1 in general.
2.2	Specifically Section F: Example Projects Which Best Illustrate Proposed Team's Qualifications, Items 20 through 24 - Projects relevant to this Contract in Scope, Size, Cost, etc.
2.3	Specifically Section H, Item 31 - Probity Questions.
2.4	Specifically Section H, Item 33. Chronological List of the Ten Most Recent Completed Contracts.
3.0 QBS Submittal Booklet - CT330 Part 2:	Review CT330 Part 2 in general.
4.0 Consultant Performance Evaluations:	Shortlisted Firm's Existing Consultant Performance Evaluations from the DAS Performance Evaluation Files in Room 478.
5.0 Existing Phone Reference Check Questionnaires:	Shortlisted Firm's Existing Phone Reference Check Questionnaires from the DAS Performance Evaluation Files in Room 478.
6.0 New Phone Reference Check Questionnaires:	Shortlisted Firm's New Phone Reference Check Questionnaires from the DAS PM/Chair in Room 478.
7.0 Selection Interview:	If a selection interview is required for the Selection of a Firm for this Contract then the Interview Panel Members must evaluate Firm's Interview Presentation in response to the Selection Performance Criteria.

Note:
If Interviews are required for the Selection of a Firm for this Contract then Firms that substitute a proposed Key Personnel subconsultant(s) named in **CT330 Part I 126** or **CT330 Part II 127** prior to their interview must notify the Selection Interview Panel members prior to the start of their interview and provide resume(s) for the Key Personnel subconsultant(s) of the firm or they shall receive a **Deficient Submittal Letter 128**.

2.19 Selection Interview Presentations (For Selections That Require An Interview)

For those Selections that require an Interview Presentation each Firm will be given thirty (30) minutes to demonstrate that they possess the highest qualifications in relation to the scope and needs of this specific contract and project based on the following Selection Criteria Categories:

Selection Criteria Categories
Problem Solving Capabilities
Organizational / Team Structure for this Contract
Past Performance Data
Approach to the Work Required by This Contract
Contract Oversight Capabilities

2.19.1 During Each Selection Interview: Each Selection Interview Panel Member shall take notes on the presentation on the **Selection Rating Sheet 138** for the purposes of evaluating the presentation in relationship to the five Selection Interview Criteria Categories.



- 2.19.2 Questions & Answer Period:** Immediately following the Presentation, there will be fifteen (15) minutes of Questions and Answers (Q&A) allotted for follow up questions by the Selection Panel Members. The Firm's presentation and responses to the follow-up questions shall be evaluated and rated by the Selection Panel Members in accordance with the **Selection Rating Sheet Guidelines 138**.
- 2.19.3 End Of The Interview:** At the conclusion of the Q&A period, the Firm shall exit the interview room. After the Firm has exited the Selection Interview, a brief discussion of the Selection Panel Members shall take place solely to discuss any question or answer that was confusing or not understood. Each panel member shall then individually note their rating of the firm on each of the five criteria on the **Selection Rating Sheet 138**, sign it and give it to the DAS Chair at the end of that interview discussion.

NOTE:

Selection Panel members must rate the Interview presentation, qualifications, and follow-up Q & A's of each individual Firm against the screening guideline rating criteria (point values modified as applicable) rather than comparing the presentations to each other

2.20 Connecticut Code Expertise Points

- 2.20.1 Connecticut Building Official License:** If a shortlisted firm has submitted a resume of "Key Personnel", with a Connecticut Building Official License, in Division 6 – (CT Code Expertise and Site Proximity) of their Selection Submittal Booklet, then the firm shall receive an additional maximum of five (5) "CT Code Expertise" points that shall be applied the firm's Total Selection Grade Points at the conclusion of their interview.
- 2.20.2 Substantial Working Knowledge of the Connecticut State Codes:** If an Interview is required for the Selection of a Firm for the Contract and the shortlisted firm demonstrates, during the interview, that the Key Personnel with the Connecticut Building Official license has a substantial working knowledge of the Connecticut State Codes in relationship to the scope of this contract, then each such the firm shall receive an additional maximum of five (5) "CT Code Expertise" points that shall be applied the firm's "Total Selection Grade Points" at the conclusion of their interview. For those Selections that do not require an interview and the Key Personnel with the Connecticut Building Official license has a substantial working knowledge of the Connecticut State Codes in relationship to the scope of this contract, then each such the firm shall receive an additional maximum of five (5) "CT Code Expertise" points that shall be applied the firm's "Total Selection Grade Points" at the conclusion of their Selection.
- 2.20.3 Site Proximity" Points:** After each Selection, each panel member shall individually verify the location map submitted by the Firm (See Division 6 – CT Code Expertise and Site Proximity of Firm's QBS Submittal Booklet) indicates that the travel distance from the Firm's headquarter office location to the town or city location(s) of the project(s) is 60 miles or less. If the travel distance of a shortlisted Firm's headquarter office location to the project site location(s) is 60 miles or less then each such shortlisted Firm shall receive ten (10) "Site Proximity" points" that are applied to their "Total Selection Grade Points" at the conclusion of their Selection.

2.21 Conclusion Of Each Individual Selection Rating Score Meeting

The DAS Chair will scan the grades to determine whether any panel members' grades are within two (2) grades (example: A and C grades) of each other for a Selection criteria category or if there were any responses deemed "Unacceptable/non-responsive" for any of the Selection criteria category. The purpose of this scan is to look for any significant inconsistency in the ratings by the various panel members.

- 2.21.1 Chair Ratings Scan:** If panel members are within one grade of each other, and there are no ratings of "F", or "Unacceptable," and there are no further questions concerning the selection, then this selection evaluation is concluded and the next Selection Rating Score shall begin or Interview presentation shall begin if it is determined that an Interview is required for the Selection of a Firm for this Contract.



2.21.2 Rating Discrepancy: If there is a discrepancy (if panelists are not within one grade of each other or there is a rating of "F" or "Unacceptable"), the Chair will open a panel discussion. The purpose of this discussion is to enable the Selection Panel members to discuss all aspects of the Firm's and qualifications and to share information and justification for opinions. It is also to ensure there is a common understanding of questions and responses. The Selection Panel members may discuss any part of the Selection that was confusing or not understood.

2.21.2.1 Discrepancy Resolutions: As a result of this discussion, three things can occur:

Discrepancy Resolutions
It is possible a panel member may see justification for revising a grade based on the discussion. If so, the grade can be revised on the panel member's Selection Rating Sheet 138 and initialed. The Selection Panel member must document the reason for the change on their Selection Rating Sheet 138 .
or
A Selection panel member may still choose not to change his or her grade. Then their original grade shall remain. <i>(If a Selection Panel member has had a prior experience with the firm and as a result does not change his or her opinion regardless of the present information, this should be so noted in his or her comments).</i>
and/or
Based on this discussion, other Selection Panel members may also chose to revise their scores, supplying a written justification for the change and initialing this grade change on Selection Rating Sheet 138 .

Note:
An authorized observer approved by the DAS Commissioner may monitor the Selection process.

2.22 Conclusion Of All Selections Rating Periods

The Selection Panel is dismissed and the chair delivers all of the following documents, including but not limited to, the **Selection Rating Sheet 138** from each panel member and the **Selection Observer Certification 119** (if applicable), the **Selection Sign-in Sheets 140**, and one (1) copy of each Firm's Presentation Handout(s) to the DAS QBS Unit.

2.23 Preparation Of Selection Recommendation

Steps	Selection Recommendation Tasks
1.0	<ul style="list-style-type: none"> • At the conclusion of the Selection Meeting the QBS Unit shall receive the entire completed all of the Selection Rating Sheet s and if an Interview is required for the Selection of a firm for this Contract then one (1) copy of each Firm's Selection Interview Presentation Handout(s) from the Chair. • The DAS PM / Chair shall also deliver copies of all documents associated with the Selection Interview Process to the DAS QBS Unit for their Records, including, but not limited to the following: <ul style="list-style-type: none"> ○ Phone Reference Check Questionnaire 136; ○ Selection Interview Sign-in Sheets 140; Any other documentation relevant to the Selection process.



2.23 Preparation of Selection Recommendation (Continued)

Steps	Selection Recommendation Tasks (Continued)												
2.0	<ul style="list-style-type: none"> • The DAS QBS Unit shall enter each Grade (A or B or C or F) for each Selection Criteria Category, for each Firm, from each panel member's Selection Rating Sheet 138, into the Selection Rating Calculation Spreadsheet 142. • Compute the Selection Interview Grade Point Values for each Firm. • Compute 90% of each Firm's Grade Points = Total Selection Grade Points. • Compute 10% of each Firm's Screening Grade Points = % Total Screening Grade Points <hr/> <ul style="list-style-type: none"> • Compute: <table style="margin-left: 40px; border-collapse: collapse;"> <tr> <td style="padding-right: 10px;">Each Firm's Total Selection Grade Points</td> <td style="padding-right: 10px;">+</td> <td>Each Firm's % Total Screening Grade Points</td> </tr> <tr> <td></td> <td style="padding-right: 10px;">+</td> <td>Each Firm's CT Code Expertise (as applicable)</td> </tr> <tr> <td></td> <td style="padding-right: 10px;">+</td> <td>Each Firm's Site Proximity Points (as applicable)</td> </tr> <tr style="border-top: 1px solid black;"> <td style="padding-right: 10px;">=</td> <td></td> <td>Each Firm's Final Total Selection Grade Points</td> </tr> </table> 	Each Firm's Total Selection Grade Points	+	Each Firm's % Total Screening Grade Points		+	Each Firm's CT Code Expertise (as applicable)		+	Each Firm's Site Proximity Points (as applicable)	=		Each Firm's Final Total Selection Grade Points
Each Firm's Total Selection Grade Points	+	Each Firm's % Total Screening Grade Points											
	+	Each Firm's CT Code Expertise (as applicable)											
	+	Each Firm's Site Proximity Points (as applicable)											
=		Each Firm's Final Total Selection Grade Points											
3.0	<ul style="list-style-type: none"> • A member of the DAS QBS Unit shall compute the final scores of each Firm. • Another member of the DAS QBS Unit, not involved in the original screening computation, shall independently check the original screening computation for accuracy. • The completed work sheet shall be signed by both DAS QBS Unit staff members. 												
	<p>3.1 For Final Ratings Tie Only:</p> <ul style="list-style-type: none"> • In case of a tie in the Final Rating the tied Firm that is more highly rated by the User Agency will be recommended for Selection in accordance with the Selection Recommendation Protocol 143. • The Selection process goes to Step 4. 												
4.0	<p>The three (3) firms with the highest final scores will be recommended in rank order to the DAS Commissioner for Conditional Selection.</p>												

2.24 Conditional Selection By The DAS Commissioner

Per Section 4b-57 "The Selection Panel shall submit a list of the most qualified firms to the commissioner for his consideration unless fewer than three responses for a particular project have been received, in which case, the panel shall submit the names of all firms who have submitted responses." The DWP QBS Unit shall submit a **Commissioner Selection Approval Memorandum 144** to the DAS Commissioner who shall make the final Selection from the list of most qualified firms submitted by DAS QBS Unit. If the DAS Commissioner does not select the highest rated Firm listed by the Selection Interview Panel, he or she shall prepare a written explanation of such decision.

All Screening and Selection documents shall be available for public inspection after execution of the negotiated contract with the selected Firm.

2.25 Selection Results Notifications

After the DAS Commissioner has made the Selection, the DAS QBS Unit shall send a **Conditional QBS Letter 145** to the successful Firm. That Unit shall also send a **Not Selected Letter 146** to all other Firms who shortlisted but were not selected, and will advise the Selection Panel Members of the results.



2.26 QBS Records

Securely bound copies of QBS Submittal Booklets reviewed by either the DAS Screening Panel or the Selection Panel shall be returned to DAS QBS Unit. All documents and the **QBS Records Checklist 147** will be filed with the DAS QBS Unit. Three (3) ring binder copies of RFQ Submittals shall be forwarded to the assigned DAS PM of the contract and filed with the Team file.

Completed firm **Phone Reference Check Questionnaires 136** will be filed in the QBS Unit in the firm's evaluation folder (in DAS QBS Unit).

All rating information shall be treated as confidential and is not releasable until final contract signing and approval by the Office of the Attorney General. Upon execution of the contract, other firms may request a copy of the screening and selection rating sheets (DAS QBS Unit).

2.27 Debriefing

All firms wishing to obtain feedback on their initial QBS Submittal Booklet, or their interview presentation, if an Interview was required for Selection of a firm for this Contract, then the Firm's may do so by contacting the DAS QBS Unit. The DAS Process Unit Manager or another designee is exclusively responsible for conducting a debriefing with firms who were not chosen.

2.28 Fee Negotiation And Contract Award

A scope meeting shall be conducted by the DAS PM and the User Agency Representative with the selected firm to discuss the contract scope and details of required services of the architect/engineer and their sub consultants. The selected Firm shall submit a detailed fee proposal and the fee shall be negotiated. A contract shall then be written and processed for approval. Prior to the start of work, all contracts must be approved by the DAS Commissioner and the Office of the Attorney General.

End

QBS For Major Project Consultant Contracts (Formal)



3.0

Qualification Based Selection (QBS)
For
Design/Build (D/B) Screening

(For Competitive Sealed Proposal Selection)



3.0 Qualifications Based Selection (QBS) For Design/Build Screening

3.1 Overview

3.1.1 Purpose

In accordance with the requirements of CGS § 4b 24 (4) the DAS Commissioner may designate projects to be accomplished on a “**Total Cost Basis**” for the following:

- 3.1.1.1 New facilities to provide for the substantial space needs of a requesting user agency;
- 3.1.1.2 The installation of mechanical or electrical equipment systems in existing state facilities;
- 3.1.1.3 The demolition of any state facility that the commissioner is authorized to demolish under the general statutes.

If the commissioner designates a project as a designated total cost basis project, the commissioner may enter into a single contract with a private developer which may include such project elements as site acquisition, architectural design, and construction.

3.2 D/B Project Initiation, Designation, PM Assignment, And QBS Screening

D/B Project Initiation, PM Assignment, And Planning Steps	
Steps	
1.0	Project Initiation:
1.1	A User Agency shall submit a User Agency Project Initiation Request/B100S 115 , with all of the required supporting project/contract initiation documentation, to the DAS Chief Architect.
2.0	Designation of a Total Cost Basis Project:
2.1	A project may utilize the competitive sealed proposal selection process only when the Commissioner has determined in writing, pursuant to regulations, that the use of competitive sealed proposal selection process is practicable or advantageous to the State.
2.2	If the Commissioner designates a project as a designated “Total Cost Basis” project, then the Commissioner may enter into a single contract with a private developer which may include such project elements as site acquisition, architectural design, and construction.
3.0	Assignment of the Project to a PM:
3.1	If the project has been designated a “Total Cost Basis” by the Commissioner and User Agency Project Initiation Request/B100S 115 has been correctly completed by the User Agency then the Chief Architect shall meet with the Director of Project Management and Supervising Project Managers to determine assignment of the project / contract to a PM.
3.2	The DAS Chief Architect and Chief Engineer, in conjunction with the ADPM, PM, and, Agency Representative shall meet to discuss the D/B Best Value Based Selection/Competitive Sealed Proposal Procedure for the specific project.



D/B Project Initiation, PM Assignment, And Planning Steps
(Continued)

4.0 D/B QBS Planning Meeting Agenda:

The PM shall conduct a QBS Planning Meeting with the User Agency to review project scope, cost, schedule, etc. to obtain critical project specific information for the preparation of the **RFQ Legal Notice 116** and **RFQ Web Advertisement 117**.

4.1 D/B QBS Screening Planning Meeting Agenda:

- 4.1.1 Obtain critical project specific information applicable to the Request For Qualifications Advertisement for this Project.
- 4.1.2 Make any adjustments to standard rating points for the screening criteria within the allowable point range (see the screening point tables below).
- 4.1.3 DAS shall establish a Screening Panel which shall consist of six members: Three of whom shall be appointed by the DAS Commissioner and shall be current employees of the DAS; two of whom shall be appointed by the department head of the user agency; and one of whom who shall be a neutral party appointed by the DAS Commissioner.

The QBS D/B Screening Panel shall review and rate all QBS Submittals Booklets in accordance with the requirements of this Section. The D/B Teams with highest qualifications shall be invited to participate in the Competitive Sealed Proposal Selection Procedure and respond to a Request for Proposal (RFP).

3.3 QBS D/B Screening And Competitive Sealed Proposal Selection Procedures

The selection of a Design/Builder is a two (2) step D/B Selection Procedure is as follows:

3.3.1 Step 1 - QBS D/B Screening Shortlist Procedure:

Step 1 utilizes the QBS D/B Screening Shortlist procedure for the Competitive Sealed Proposal Selection Procedures (Best Value) for the selection of a D/B Proposer as stated below:

QBS D/B Screening Shortlist Procedure:	
1.0	DAS shall advertise an RFQ for prospective D/B Proposers to submit their teams Qualifications based upon a project's specific needs and requirements.
2.0	No later than six (6) weeks after the deadline for proposal submission, unless extended in writing by the commissioner, each QBS D/B Screening Panel Member of the six (6) member QBS D/B Screening Panel shall evaluate all QBS Submittal Booklet Requirements 124 and the QBS Submittal Booklet - D/B Supplement 124.1 for completeness and shall Shortlist the no more than the four (4) highest rated D/B Proposers to submit a Request for Proposal (RFP) for a specific project and attend an Selection Interview.
Note: Potential D/B Proposers are specifically directed NOT to submit technical and/or price proposals during this first phase of the selection procedure.	

3.3.2 Step 2 - Competitive Sealed Proposal Selection Procedure(Best Value Based Selection):

Step 2 is Competitive Sealed Proposal Selection (Best Value Based Selection) and utilizes a Competitive Sealed Proposal Selection Procedure for the selection of a D/B Proposer.



3.3.2.1 D/B Best Value Based Selection:

The D/B Selection Procedure is utilized where the project's "Qualitative Criteria Components" and "Total Cost Components" are both selection requisites for selection.

D/B Best Value Based Selection Procedure:	
1.0 Shortlisted D/B Proposer Review:	The D/B Interview/Award Panel shall review all shortlisted D/B Proposals for conformance with the requirements of the RFP and create a list of no more than four (4) final shortlisted D/B Proposers.
2.0 Qualitative Criteria Components Evaluation:	The D/B Interview/Award Panel shall evaluate each Proposal Submission and interview each of the final shortlisted D/B Proposers and determine rating scores for the "Qualitative Criteria Components" of their Proposal based upon on the established best value criteria for the project.
3.0 Total Cost Proposal Components:	At the conclusion of the interviews and rating the "Qualitative Criteria Components" of each of the shortlisted D/B Proposers the D/B Interview/Award Panel shall then open the "Sealed Total Cost Proposal Components" of all of the final shortlisted D/B Proposers.
4.0 Total Cost Components Evaluation:	The "Total Cost Components" of each Proposal shall receive a rating score based upon the established "Total Cost Criteria Components" for the project.
5.0 Evaluation Calculation:	The rating scores for the "Qualitative Criteria Components" for each Proposal shall be added to "Total Cost Components" of the Proposal to determine the "Best Value" proposal.
6.0 Best Value Proposal:	The "Best Value" proposal shall be the Proposal with the highest rated combined score for the "Qualitative Criteria Components" plus the "Total Cost Components". The Design/Builder with the "Best Value" proposal shall be selected to design and build the building.
7.0 Tie Breaker Protocol:	In the event of a tie score, the D/B Proposers with the highest adjusted Total Best Value Score by the User Agency shall be ranked higher than the other D/B Proposers.

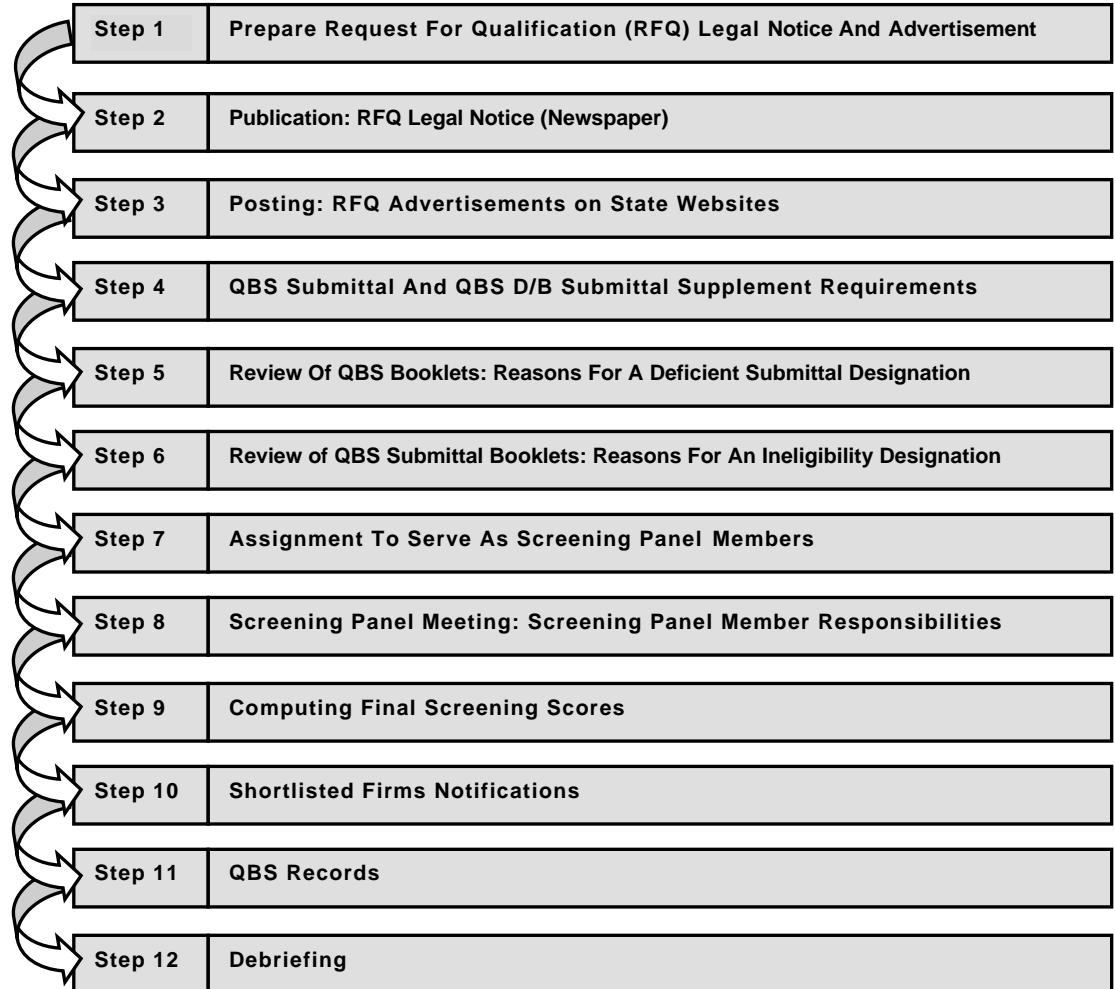
Note:

Prior or simultaneous to the D/B QBS Screening, the DAS Project Manager should utilize either the Major Project - Consultant Contract (Formal) QBS procedure or Task Order - Contract (On-Call) QBS Procedure to select a Design/Build Criteria Architect (D/BCA).

The D/BCA is selected to provide the services that include, but are not limited to, the review of design alternatives for the project; refinement and updating of the project requirements; development of a Request for Proposals (RFP) to be used by DAS to solicit Competitive Sealed Proposals from Design/Build Teams; and to assist DAS throughout the project's Design/Build design and construction procedure.



3.4 QBS For Design/Build Screening - Procedure Flow Chart
(QBS Screening for Competitive Sealed Proposal)





3.5 Preparing The Request For Qualifications (RFQ) Legal Notice And (RFQ) Web Advertisement

3.5.1 RFQ Meeting Agenda For QBS D/B Screening

The PM shall conduct a RFQ Meeting with the User Agency to review project scope, cost, schedule, etc. to obtain critical project specific information for the preparation of the **RFQ Legal Notice 116** and **RFQ Web Advertisement 117** as follows:

RFQ Meeting Agenda For QBS D/B Screening	
3.5.1.1	Strategic Facility Planning: The PM and User Agency Representative identifies the prospective project in broad scope needs such as:
3.5.1.1.1	Program Size;
3.5.1.1.2	Schedule;
3.5.1.1.3	Budget;
3.5.1.1.4	Site Issues: (vehicular access, parking, utilities, adjacencies, existing structures/uses, rights of way, environmental, etc.)
3.5.1.1.5	Existing Documentation: (site surveys, building plans, master plans, utility plans, geotechnical reports, hazardous material reports, environmental reports, etc.)
3.5.1.1.6	Technology (telecommunications, security, energy, etc.)
3.5.1.2	Make any adjustments to standard rating points for the QBS D/B Screening Criteria within the allowable point range (see the QBS D/B Screening Point Tables below).
3.5.1.3	To identify all potential QBS D/B requirements.

Note:

No Interviews are required in the D/B QBS Screening procedure.

3.6 Preparation Steps For The RFQ Advertisement And Legal Notice

PM	
Step	Task
1.0	Complete RFQ Web Advertisement 117 .
2.0	Submit the completed RFQ Web Advertisement 117 to their ADPM for review and approval.
3.0	Complete RFQ Transmittal To QBS Unit 120 and submit to their ADPM for review and approval.
4.0	Upon approval by the ADPM, the PM shall transmit RFQ Web Advertisement 117 and RFQ Transmittal To QBS Unit 120 to the QBS Unit by both hard copy (with signatures) and electronic copy- for each contract.
5.0	The QBS Unit shall insert the information from the approved RFQ Web Advertisement 117 into a RFQ Legal Notice 116 .
6.0	Upon inserting the above information the QBS Unit shall then transmit these documents via RFQ Transmittal To Commissioner 121 to the Commissioner for his signature on the RFQ Legal Notice 116 .
7.0	The RFQ Legal Notice and the RFQ Web Advertisement(s) shall be transferred to Procurement via the RFQ Transmittal To Procurement 122 (multiple projects may be transmitted in one RFQ Legal Notice).

Note:

The QBS Unit will verify that the content of the **RFQ Web Advertisement 117** conforms to the minimum content requirements. The QBS Unit will insert the advertisement date and due date. A RFQ Legal Notice transmitted to the Commissioner for his signature may be a composite summary of multiple projects.

3.6.1 The PM must indicate on the **RFQ Transmittal to QBS Unit 120** one of the following Rating Point systems to be utilized for the specific contract.

3.6.2 Standard Rating Points: The QBS D/B Screening Criteria Categories have standard rating points (as indicated in the tables below) for all QBS D/B Screening Criteria Evaluations.



- 3.6.2.1 Approved Adjusted Rating Points:** The Standard Rating Points are allowed to be adjusted **only** if the Contract meets the following conditions:
- 3.6.2.1.1** Contract is for Consultant services of an unusual nature;
 - 3.6.2.1.2** Written permission from all of the following: DAS Deputy Commissioner, Chief Architect, Chief Engineer, and Director of Project Management;
 - 3.6.2.1.3** The Approved Adjusted Rating Points are within the Allowable Point Range (as indicated in the tables below).

3.7 QBS D/B Screening Criteria Category Point Table

Example 3.7.1 QBS D/B Screening Criteria Category Table

Criteria Number	QBS D/B Screening Criteria Categories	Standard Rating Points	Allowable Point Range	Approved Adjusted Rating Points
1	Experience with Work of Similar Size and Scope as Required for this Contract	35	35-45	
2	Organizational / Team Structure	30	25-35	
3	Past Performance Data	20	20 <i>(Not Adjustable)</i>	20 <i>(Not Adjustable)</i>
4	Partnering Experience	15	10-20	
Maximum Total Points per QBS Screening Panel Member		100	100	100

Example 3.4.7.2 QBS D/B Screening Criteria Standard Point Value Calculations Table

Criteria Number	QBS D/B Screening Criteria Categories (Standard Rating Points)	Standard Grade Point Values			
		A = 100%	B = 80%	C = 60%	F = 0%
1	Experience with Work of Similar Size and Scope as Required for this Contract	35	28	21	0
2	Organizational / Team Structure for this Contract	30	24	18	0
3	Past Performance Data	20	16	12	0
4	Partnering Experience	15	12	9	0

NOTE:
A PM shall utilize the **RFQ Transmittal To QBS Unit 120** to seek approval for the adjustment of the Standard Rating Points in the QBS D/B Screening Criteria Point Table for a specific Contract. The Standard Rating Points are adjustable within the Allowable Point Range, but the adjustment of the Standard Rating Point weight for the Firm's Past Performance Data is **not adjustable**.



3.8 Publication: RFQ Legal Notice (Newspaper)

The **RFQ Legal Notice 116** contains a statement that all **QBS Submittal Booklets Requirements 117**, and all required supplements, attachments, etc. must be submitted at the designated location by the deadline for submitting an offer and Shall be reviewed by the QBS Unit for compliance. Any Firm's QBS Submittal Booklet and QBS submittal material such as required supplements, attachments, etc. received after the scheduled deadline shall result in the Firm's submittal being deemed deficient for this contract and their QBS submittal material shall be not be considered for this contract and shall be returned to the Firm. The Firm shall receive a **Deficient Submittal Letter 128**.

Legal Notice (Newspaper) Statutory Requirements
In accordance with CSG § 4b-24 (4): "The commissioner may designate projects to be accomplished on a total cost basis for (A) new facilities to provide for the substantial space needs of a requesting agency, (B) the installation of mechanical or electrical equipment systems in existing state facilities, or (C) the demolition of any state facility that the commissioner is authorized to demolish under the general statutes. If the commissioner designates a project as a designated total cost basis project, the commissioner may enter into a single contract with a private developer which may include such project elements as site acquisition, architectural design and construction. The commissioner shall select a private developer from among the developers who are selected and recommended by the award panels established in this subdivision. All contracts for such designated projects shall be based on competitive proposals received by the commissioner, who shall give notice of such project, and specifications for the project, by advertising, at least once, in a newspaper having a substantial circulation in the area in which such project is to be located."

3.9 Posting: RFQ Advertisements On State Websites

In accordance with the Governor Rell's Executive Order No. 3 (12-15-04), and the DAS **Advertising Publication Standards 123**, the **RFQ Web Advertisement 117** shall be posted on the DAS "State Contracting Portal" website. The DAS "State Contracting Portal" Website shall act as the single electronic portal for purposes of posting all contracting opportunities with state agencies in the executive branch and all higher education agencies and institutions. The **RFQ Web Advertisement 117** also shall be posted on the DAS/DCS Website and shall be sent to various trade and professional associations, which may post it on their respective Websites. *The RFQ Web Advertisement 117* shall contain more detailed project information than the **RFQ Legal Notice 116** and shall provide interested parties with a link to the legal submittal requirements and instructions and to obtain the requisite forms, including the affidavit forms.

State Advertisement Websites	
DAS Website: (State Contracting Portal)	http://www.biznet.ct.gov/SCP_Search/Default.aspx?AccLast=1
DAS/DCS Website:	www.ct.gov/dcs

3.10 QBS Submittal Booklet Requirements

Prospective Firms shall send their QBS Submittal Booklets to the CT DAS QBS Unit as specified in the **RFQ Web Advertisement 117**, **QBS Submittal Booklet Requirements 124**. All QBS Submittal Booklets shall include, but not be limited to, the following:



3.10 QBS Submittal Booklet Requirements (Continued)

QBS Submittal Booklet Requirements		
Division	Division Title	Document Name
1	Table of Contents	-
2	Letter of Interest	-
3	QBS Email Registration	QBS Email Registration 125
4	Credentials and Insurance	-
5	Affidavits and Certifications	-
6	CT Code Expertise & Site Proximity	-
7	CT DAS 330 Part I	CT330 Part I 126
8	CT DAS 330 Part II	CT330 Part II 127

3.11 QBS Submittal Booklet - D/B Supplement Requirements

As specified in the *RFQ Web Advertisement 117* and the **QBS Submittal Booklet - D/B Supplement Requirements 124.1**, Firms are required to submit the following:

QBS Submittal Booklet - D/B Supplement Requirements		
Division	Division Title	Document Name
9	Table of Contents	-
10	QBS D/B Email Registration	QBS D/B- Email Registration 125.1
11	DAS Pre-qualification Certificate and Update Statement	-
12	Legal Documents Requirements	-
13	QBS D/B - General Questionnaire	QBS D/B - General Questionnaire 150
14	QBS D/B - Design Questionnaire	QBS D/B - Design Questionnaire 151
15	QBS D/B - Build Questionnaire	QBS D/B - Build Questionnaire 152

Each Firm must comply with all submittal requirements, as described in the *RFQ Legal Notice 116* and *RFQ Web Advertisement 117* and all supplements, attachments as required by the **QBS Submittal Booklet Requirements 124** and **QBS Submittal Booklet - D/B Supplement Requirements 124.1**. All submittals will be tracked and stored in a central location at DAS.

3.12 Review Of The QBS Submittal Booklets, QBS Submittal Booklet - D/B Supplement, All Supplements, And/Or Attachments For Compliance: Reasons For A Deficient Submittal Designation

All QBS Submittal Booklets, QBS Submittal Booklet - D/B Supplement and all Supplements, and Attachments shall be reviewed by the DAS QBS Unit staff for compliance. Any Firm's QBS Submittal Booklet(s) and QBS submittal material such as required supplements, attachments, etc. received after the scheduled deadline shall result in the Firm's submittal being deemed deficient for this contract and their QBS submittal material shall be not be considered for this contract and shall be returned to the Firm. The Firm shall receive a **Deficient Submittal Letter 128**. There will be no exceptions.

Note

All QBS Submittal Booklets, QBS Submittal Booklet - D/B Supplement and all Supplements, and Attachments material can be found deficient at any point during the QBS procedure.



3.13 Reasons For An Ineligibility Designation

The reasons a Firm may be deemed ineligible for a specific project include, but are not limited to, the following.

Reasons For An Ineligibility Designation
Affidavits and certifications not submitted or correctly completed as per the Website Ad instructions.
Firm is not properly licensed in the State.
Firm has been disqualified.

Firms deemed ineligible shall receive a **Not Eligible Letter 129**.

Note
A firm can be found not eligible at any point during the QBS procedure.

3.14 Assignment To Serve As QBS D/B Screening Panel Member

3.14.1 In accordance with the requirements of the “State of Connecticut Regulation of Department of Administrative Services Concerning Selection Panels For Design-Build Teams and Special Legislation Contractors” DAS shall create a QBS D/B Screening Panel that shall be structured as required by CGS§ 4b-100a for the D/B Award Panel. The QBS D/B Panel Members shall be different panel members than the D/B Award Panel members and consist of following:

DAS shall establish construction services award panels which shall each consist of six (6) members three (3) of such members shall be appointed by the DAS Commissioner, shall be current employees of DAS and shall serve only for deliberations involving the project for which such members are appointed. Two members shall be appointed by the department head of the user agency and one member shall be a neutral party appointed by the DAS Commissioner.

3.14.2 Each QBS D/B Screening Panel Member shall receive a **QBS Panel Member Email Notification 130**. The CT DAS QBS D/B Screening Panel Chair shall be the first PM assigned to the QBS D/B Screening Panel via the random Selection Procedure by the QBS Unit (or his/her substitute).

3.15 QBS D/B Screening Panel Meeting: Screening Panel Members Responsibilities

3.15.1 Mandatory QBS D/B Screening Panel Meeting: There will be a mandatory QBS D/B Screening Panel Meeting for all QBS D/B Screening Panel Members that will be coordinated and facilitated by the QBS D/B Screening Panel Chair.

NOTES:

- The PM will only serve as a facilitator for **Task #1** of the QBS D/B Screening Panel Meeting, but is not a voting member.
- The PM must leave the QBS D/B Screening Panel Meeting at the conclusion of **Task # 1**.

3.15.2 QBS D/B Screening Panel Tasks: At this mandatory meeting the QBS D/B Screening Panel members shall have the responsibility to accomplish the following tasks:

Task No. 1	
QBS D/B Screening Panel Members Receive Overview Of The following:	
1.0	Project Specific Information (Overview by the PM and User Agency Representative)
2.0	Any Unique Or Technical Issues (Overview by the PM and/or Applicable Expert)
3.0	Screening Panel Member Rating Sheet Guidelines 131 (Overview by a DAS Process Management Unit Staff)



3.15.2 QBS D/B Screening Panel Tasks: (Continued)

Task No. 2	
D/B QBS Screening Panel Members Review The Following Screening Documents:	
1.0	RFQ – Web Advertisement;
2.0	Past Performance Data as follows:
2.1	QBS Submittal Booklet, CT330 Part 1, Section F: Example Projects Which Best Illustrate Proposed Team's Qualifications, Items 20 through 24 - Projects relevant to this Contract in Scope, Size, Cost, etc.
2.2	QBS Submittal Booklet, CT330 Part 1, Section H, Item 31 - Probity Questions.
2.3	QBS Submittal Booklet, CT330 Part 1, Section H, Item 33. Chronological List of the Ten Most Recent Completed Contracts.
2.4	QBS Submittal Booklet - D/B Supplement, Division 13 – QBS D/B General Questionnaire
2.5	QBS Submittal Booklet - D/B Supplement, Division 14 – QBS D/B Design Questionnaire.
2.6	QBS Submittal - D/B Booklet Supplement, Division 15 - QBS D/B Build Questionnaire.
3.0	Screening Panel Member Rating Sheet 131

NOTES:

- The DAS QBS Unit Staff Member may leave the QBS Screening Panel meeting after delivering the screening documents and must not be present during **Task # 2**.
- None of the above screening documents shall be allowed to be removed from DAS for review at any time prior to or during the screening stage.

Task No. 3	
Evaluate/Rate All Submittals:	
The QBS D/B Screening Panel Members shall utilize the Screening Panel Member Rating Sheet 131 and the Screening Panel Member Rating Sheet Guidelines 131 to rate the following QBS D/B Screening Criteria for all submittals:	
QBS D/B Screening Criteria Categories	
Experience with Work of Similar Size and Scope as Required for this Contract	
Organizational / Team Structure	
Past Performance Data	
Partnering Experience	

NOTES:

- QBS D/B Screening Panel members must rate the submittal qualifications of each individual firm against the screening guideline rating criteria (point values modified as applicable).
- QBS D/B Screening Panel members must not rate individual submittal qualifications in comparison to each other.

3.15.3 The QBS D/B Screening Panel Chair shall collect each **Screening Panel Member Rating Sheet 131** from each panel member for computation by the QBS Unit.



3.16 Computing Final QBS D/B Screening Scores

3.16.1 Computations:

Task 1
Compute The Final Scores:
A member of the DAS QBS Unit staff shall compute the final scores of each Firm.
Task 2
Computation Verification:
Another member of the DAS QBS Unit staff, not involved in the original screening computation, shall independently check the original screening computation for accuracy. The completed Screening Ratings Calculation Spreadsheet 132 shall be signed by both DAS QBS Unit staff members.

3.17 D/B Shortlisted Firms Notifications

Prior to notification to all Firms, the DAS QBS Unit will prepare a list for the DAS Commissioner of firms the D/B QBS Screening Panel recommends for interview. The shortlist must be reviewed by the DAS Deputy Commissioner of the Office of Design & Construction and then a **Commissioner Screening Shortlist Approval Memorandum 133** must be submitted to DAS Commissioner for approval. No more than four (4) firms will be recommended for interview unless the recommendation is accompanied by a written justification from the DAS Supervisor of the QBS Unit, and approved by the DAS Commissioner.

3.17.1 Design/Build Request For Proposals: After the shortlisted firms have been officially notified then Step 2 Competitive Sealed Proposal Selection of D/B Selection Procedure begins. The DAS QBS Process Unit shall send a Design/Build **Request For Proposals 148** notify (by mail, fax or e-mail) the Shortlisted D/B Teams of the specific Date/Time/Location that the Request for Proposals is available. Request for Proposal may include, but not be limited to the following information:

Example: Request For Proposal	
Volume 1	Conditions and Requirements of the Proposal
Part 1	Proposal Provisions
Part 2	Total Cost Proposal Provisions
Part 3	D/B General Conditions
Part 4	D/B General Requirements
Part 5	Sample - D/B Agreement Between State of Connecticut and Design/Builder
Part 6	Information Available to Proposers
Part 7	D/B Process Documents
Volume 2	Program For Design
-	Program Introduction
-	Program Criteria
-	Room Data Sheets
-	Conceptual Room Layout
Volume 3	Construction Quality Standards
-	Outline Of Technical Specifications Divisions



- 3.17.2 Deficient Submittal:** The DAS QBS Process Unit shall send a **Deficient Submittal Letter 128** (mail, fax or email) to Firms containing the reason(s) why their submittal was deemed deficient.
- 3.17.3 Not Shortlisted:** The DAS QBS Process Unit shall send **Not Shortlisted Letter 135** (mail, fax or email) to Firms notifying them that they have not been shortlisted for a Selection Interview. The letter shall offer the firm an opportunity for a debriefing once the final contract is negotiated and signed.
- 3.17.4 Design/Build Selection Interview Invitation Letter:** The **D/B Selection Interview Invitation 149** shall be sent to all qualified Proposers after an initial QBS D/B Screening Panel Compliance review of the Proposals.

3.18 QBS Records

Securely bound copies of QBS Submittal Booklets and submittal material reviewed by the DAS D/B QBS Screening Panel shall be returned to DAS QBS Unit. All documents and the **QBS Records Checklist 147** will be filed with the QBS Unit. Three (3) ring binder copies of RFQ Submittals shall be forwarded to the assigned Project Manager of the contract and filed with the Team file.

Completed firm **Phone Reference Check Questionnaires 136** will be filed in the firm's evaluation folder (in DAS QBS Unit).

All rating information shall be treated as confidential and are not releasable until final D/B Agreement signing and approval by the CT Office of the Attorney General. Upon execution of the D/B Agreement, other firms may request a copy of the Screening rating sheets (DAS QBS Unit).

3.19 Debriefing

All firms wishing to obtain feedback on their initial submittal or their interview presentation may do so by contacting the DAS QBS Unit. The DAS Process Unit Manager or another designee is exclusively responsible for conducting a debriefing with firms which were not chosen.

NOTE:

No Debriefings shall occur prior to the execution and signing of the D/B Agreement for this Project.

3.20 Key D/B Milestone Schedule For Competitive Sealed Proposals (Best Value Based Selection)

The following is an example of the **Key D/B Milestone Schedule** for this Project as issued by DAS that shall be issued to all QBS D/B Shortlisted Firms that includes examples of typical time per milestone up and including the Final Proposal Rating and Proposer Notification:



3.20 Key D/B Milestone Schedule For Competitive Sealed Proposals (Best Value Based Selection)
(Continued)

Item	Example: Key D/B Milestone Schedule	On Day
1	Request for Proposals (RFP) Release Date to Shortlisted Proposers:	1
2	RFP Conference:	10
3	Last Date to Submit Questions Regarding RFP:	25
4	Last Date to Issue RFP Addendum:	30
5	Proposal Due Date and Time:	45 (Minimum)
6	QBS D/B Screening Panel RFP Compliance Review of Design/Technical Proposal Documents:	47
7	D/B Selection Interview Invitation Letter:	50
8	D/B Selection Panel Members Receive Design/Technical Proposal Documents:	50
9	D/B Selection Panel, PM, and Criteria Architect Meeting to Review Design/Technical Proposal Documents:	57
10	D/B Selection Panel Interviews and Design/Technical Proposal Rating:	64
11	Opening of Sealed Total Cost Proposals:	71
12	D/B Selection Panel RFP Compliance Review of Sealed Total Cost Proposal Documents:	72
13	Final Proposal Rating and Proposer Notification:	79
14	Award of DB Agreement:	TBD
15	Notice to Proceed Design/Construction:	TBD
16	Design/Construction Start Date:	TBD
17	Substantial Completion Date:	TBD

End

QBS For Design/Build Screening



10.0

Glossary of Terms



10.0	Glossary Of Terms				
Term	Definition				
Addendum	Means an addition to a completed written document.				
Advertisement	Means a procurement specification posted on an electronic public procurement website(s).				
Affidavit	Means a statement of facts which is sworn to (or affirmed) before an officer who has authority to administer an oath (e.g. a notary public). The person making the signed statement takes an oath that the contents are, to the best of their knowledge, true. It is also signed by a notary or some other officer that can administer oaths, affirming that the person signing the affidavit was under oath when doing so.				
Allocated	Amount approved by the Bond Commission for specific projects				
Authorization	Amount approved by the Legislature for a specific purpose.				
Architect/ Engineer Services	<p>Means:</p> <p>(1) Professional services of an architectural or engineering nature, as defined by State law, if applicable, that are required to be performed or approved by a person licensed, registered, or certified to provide those services;</p> <p>(2) Professional services of an architectural or engineering nature performed by contract that are associated with research, planning, development, design, construction, alteration, or repair of real property;</p> <p style="text-align: center;">and</p> <p>(3) Those other professional services of an architectural or engineering nature, or incidental services, that members of the architectural and engineering professions (and individuals in their employ) may logically or justifiably perform, including studies, investigations, surveying and mapping, tests, evaluations, consultations, comprehensive planning, program management, conceptual designs, plans and specifications, value engineering, construction phase services, soils engineering, drawing reviews, preparation of operating and maintenance manuals, and other related services.</p>				
Architectural/ Engineering and Professional Consultant Services Selection	<p>Means procedures for soliciting and evaluating qualifications and past performance to hire a "consultant," as defined by CGS § 4b-55, which is a person who is registered or licensed to practice such person's profession in accordance with the applicable provisions of the general statutes, including, but not limited to, any:</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; text-align: center; padding: 5px;"> architect; professional engineer; landscape architect and surveyor; accountant; </td> <td style="width: 50%; text-align: center; padding: 5px;"> interior designer; environmental professional; construction administrator or; planner or financial specialist; </td> </tr> </table> <p style="text-align: center;">or</p> <p>Soliciting "consultant services" as defined by CGS § 4b-55 to include those professional services rendered by:</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; text-align: center; padding: 5px;"> architects; professional engineers; landscape architects; land surveyors; accountants; </td> <td style="width: 50%; text-align: center; padding: 5px;"> interior designers; environmental professionals; construction administrators; planners; financial specialists. </td> </tr> </table> <p>As well as incidental services that members of these professions and those in their employ are authorized to perform.</p>	architect; professional engineer; landscape architect and surveyor; accountant;	interior designer; environmental professional; construction administrator or; planner or financial specialist;	architects; professional engineers; landscape architects; land surveyors; accountants;	interior designers; environmental professionals; construction administrators; planners; financial specialists.
architect; professional engineer; landscape architect and surveyor; accountant;	interior designer; environmental professional; construction administrator or; planner or financial specialist;				
architects; professional engineers; landscape architects; land surveyors; accountants;	interior designers; environmental professionals; construction administrators; planners; financial specialists.				
Best Value Based Selection	Means a Selection evaluation procedure based on comparing and evaluating weighted qualitative criteria and total cost of the proposals in relation to the scope and needs of a specific project;				
Bid	Means a competitively priced offer made by a bidder in response to an Invitation for Bids;				
Bidder Or Proposer	Means a sole proprietor, partnership, firm, corporation or other business organization submitting a bid in response to an Invitation to Bid or a Request for Proposal;				
Certification	Means a formal assertion in writing to facts.				



Competitive Sealed Bidding	Means the procedures for soliciting and evaluating a bid that is submitted in response to a Invitation to Bid in a sealed envelope, to prevent disclosure of its contents before the deadline set for the receipt of all bids and the Public Bid Opening
Competitive Sealed Proposal	Means the procedures for soliciting and evaluating a proposal that is submitted, in response to a Request for Proposals, in a sealed envelope to prevent disclosure of its contents before the deadline set for the receipt of all proposals
Construction Administrator	Means an individual, partnership, firm, corporation or other business organization under contract or employed by DAS commissioned and/or authorized to oversee the fulfillment of all requirements of the Work.
Contract	Means all types of legally binding DAS procurement agreements, regardless of what they may be called.
Contractor	Means any person, firm or corporation having a contract with DAS such as general contractors, design/builders, or consultants.
Construction	Means the process of building, altering, repairing, improving, or demolishing any public infrastructure facility, including any public structure, public building, or other public improvements of any kind to real property. It does not include the routine operation, routine repair, or routine maintenance of any existing public infrastructure facility, including structures, buildings, or real property.
Construction Manager at Risk	Means a project delivery system where a construction manager provides both construction management and general contractor services for the project. These services are provided to DAS based on a guaranteed maximum price, fixed price, or other means defined in a contract.
Design/Bid/Build (D/B/B)	Means a project delivery system in which DAS sequentially awards separate contracts, the first for architectural and engineering services to design the project and the second for construction of the project in accordance with the design
Design/Build (D/B)	Means a project delivery system in which DAS enters into a single D/B Contract with a Proposer for the design and construction of an infrastructure facility on a total cost basis in accordance with CSG § 4b-24 (4).
Design/Builder	A person, partnership, corporation, or other legal entity that is able to provide appropriately licensed contracting, architectural, engineering services, or any other services necessary for the design and construction of this project.
Emergency Procurement	Means an expedited procedure for awarding a contract made necessary by a sudden, unexpected occurrence that poses a clear and imminent danger, requiring immediate action to prevent or mitigate the loss or impairment of life, health, property, or essential public services.
Firm	In conjunction with architect-engineer services, means any individual, partnership, corporation, association, or other legal entity permitted by Title 20 of the CGS and the CT Department of Consumer Protection to practice the professions of architecture or engineering.
General Contractor	Means any person, firm or corporation, under direct contract with DAS, responsible for performing the Work.
Gift	Means anything of value, which is directly and personally received, unless consideration of equal or greater value is given in return. Gift shall not include those items exempted by CGS § 1-79, except subdivision (e) (12) of that section.
Infrastructure Facility	Means a building, structure, or networks of buildings, structures, pipes, controls and equipment that provide for public services, including, but not limited to government office buildings, public schools and universities, courthouses, prisons, public parking facilities and equipment
Interview Panel For Competitive Sealed Proposals	Means a panel of six (6) designated persons, consisting of four (4) current or retired DAS employees and two (2) user agency representative appointed by the user agency that evaluates Design/Build Proposals and submits a list of recommended consultants in rank order for Selection to the DAS Commissioner.
Interview Panel For Design/Builders Or Special Legislation Contractors	The panel of six (6) designated persons, consisting of two (2) user agency representatives, three (3) current DAS employees, and one (1) neutral that evaluates and submits a list of recommended design build teams or special legislation contractors in rank order for Selection to the DAS Commissioner



Invitation to Bid	Means all documents, whether attached or incorporated by reference, utilized for soliciting bids.
Key Personnel	Individuals who will have major contract responsibilities and/or provide unusual or unique expertise.
Legal Notice	Means a procurement specification posted as a publication in a newspaper(s) of general circulation.
Deficient Submittal Designation	Means a person, firm or entity that has submitted a bid, proposal or offer that does not conform to the requirements of the Advertisement or the submittal requirements.
Offer	Means to submit a bid, proposal or offer to DAS.
Offeror	Means a person, firm, corporation, or other legal entity that submits qualifications, a bid or a proposal.
On-Call Contract	Means a contract for a specific type of architectural-engineering/professional consultant service with a maximum fee and supplemented by task letter to define the specific assignment scope, fee, and contract time duration.
Partnering	Means a relationship of open communication and close cooperation that involves all parties, involved in the design and construction process, working together for the purpose of establishing a mutually beneficial, proactive, cooperative environment within which to achieve contract objectives and resolve issues and implementing actions as required.
Pre-Bid Or Pre-Interview Conference	Means a meeting held with prospective Offerors prior to submission of bids, proposals, or offers to review, discuss, and clarify technical considerations, specifications, and standards relative to the proposed procurement.
Procurement	Means contracting, buying, purchasing, renting, leasing, or otherwise acquiring of any supplies, services, interest in real property or construction. It also includes all functions that pertain to obtaining any supply, service, or construction, including description of requirements, solicitation for Selection, and preparation and award of contract, and all phases of contract administration.
Proposal	Means a document putting forth a description of services that could include, but is not limited to, design and construction services, and costs prepared in response to a Request for Proposal.
Public Bid Opening	Means the process of opening and reading bids at the time and place specified in the Invitation for Bids and conducted in the presence of anyone who wishes to attend.
Qualification Based Selection (QBS)	Means a Selection procedure based on comparing and evaluating weighted criteria of qualifications and performance of Offers in relation to the scope and needs of a specific project. Contract award is based first on a Selection of the highest qualifications and second on the negotiation of a fair and reasonable fee.
Real Property	Means any land, all things growing on or attached thereto, and all improvements made to buildings and structures located on the land.
Request For Proposals (RFP)	Means all documents, whether attached or incorporated by reference, utilized for soliciting proposals. This may include, but is not limited to, description of legal requirements, program requirements, technical requirements, and other Project-related documents to be made available to potential Offerors.
Request For Qualifications (RFQ)	Means all documents, whether attached or incorporated by reference, utilized for soliciting offers for qualifications. This may include, but is not limited to, all existing drawings and other project-related documents to be made available to potential Firms for the design and construction of an infrastructure facility as may be appropriate to the applicable project delivery procedure.
Responsible	Means a person, firm or other entity that has the capability in all respects to perform fully the contract or agreement requirements, and has the integrity and reliability which will assure good faith performance.
Screening Panel For QBS	Means a panel of state employees, consisting current or retired DAS employees and user agency representative(s), who are responsible for the preliminary evaluation of Requests for Qualifications for the creation of a shortlist of Firms.
Screening Panel For QBS Design/Build Screening	Means a panel of designated persons, consisting of user agency representatives appointed by the user agency head, current DAS employees, and a neutral person. The panel shall screen all QBS Submittal Documents and submit a list of recommended design/builders for interview to the DAS Commissioner.
Shortlist	The list of Firms determined to be the most qualified by a QBS Screening Committee for Consultant Selection or the QBS Screening Panel for Design Builders or Special Legislation Contractors.
State Agency	Means any office, department, board, council, commission, institution or other agency in the executive, legislative or judicial branch of state government.



State Employee	Means any employee in the executive, legislative or judicial branch of state government, whether in the classified or unclassified service and whether full or part-time, and any employee of a quasi-public agency, but shall not include a judge of any court, either elected or appointed.
Submittal Booklet	Means documents submitted in response to the Advertisement or Legal Notice or submitted in response to the contract requirements, including but not limited to, materials, studies, samples, manufacturer's data, or other such items submitted to DAS by the Consultant, General Contractor or Design-Builder for the purpose of approval or other action, as required.
Task Order	Means a supplement to a Task Order Contract (On-Call) used to specify the specific scope of work, fee, and duration of time for a defined task.
User Agency	Means the agency, school, or academy that is the recipient of services and is not authorized by law to contract for the Construction of Infrastructure Facilities (CGS § 4b-51) or Architectural/Engineering and Professional Consultant Services (CGS § 4b-55)
Work	Means all construction and services required by a Contract, including all labor, materials, equipment and services provided, or to be provided, by the General Contractor to fulfill the General Contractor's obligations. The Work may constitute the whole or a part of the Project

END



11.0

Appendix of Referenced Documents



11.0 Appendix Of Referenced Documents

Document Number	Document Title	
116	RFQ Legal Notice	
116	RFQ Legal Notice Instructions	
117	RFQ Web Advertisement	
117	RFQ Web Advertisement Instructions	
118	Certification by Agency Official or Employee Authorized to Execute Contracts	
119	Selection Interview Observer Certification	
120	RFQ Transmittal to QBS Unit	
121	RFQ Transmittal To Commissioner	
122	RFQ Transmittal To Procurement	
123	Advertising Publication Standards	
124	QBS Submittal Booklet Requirements	<i>DAS Website Document.</i>
124.1	QBS Submittal Booklet - D/B Supplement Requirements	<i>DAS Website Document.</i>
125	QBS Email Registration	<i>DAS Website Document.</i>
125.1	QBS D/B Email Registration	<i>DAS Website Document.</i>
126	CT330 Part I	<i>DAS Website Document.</i>
127	CT330 Part II	<i>DAS Website Document.</i>
128	Deficient Submittal Letter	
129	Not Eligible Letter	
130	QBS Panel Member Email Notification	
131	Screening Panel Member Rating Sheet	
131	Screening Panel Member Rating Sheet Guidelines	
132	Screening Ratings Calculation Spreadsheet	
133	Commissioner Screening Shortlist Approval Memorandum	
134	Selection Invitation Letter	
135	Not Shortlisted Letter	
136	Phone Reference Documentation	
136	Phone Reference Documentation Guidelines	
137	Selection Chair Guidelines	
138	Selection Rating Sheet	
138	Selection Rating Sheet Guidelines	
139	Selection Sequence Schedule	
140	Selection Sign-in Sheets	
141	Not Used	
142	Selection Rating Calculation Spreadsheet	
143	Selection Recommendation Protocol	
144	Commissioner Selection Approval Memorandum	
145	Conditional Selection Letter	
146	Not Selected Letter	
147	QBS Records Checklist	
148	Design/Build Request For Proposals	
149	Design/Build Selection Interview Schedule Invitation	
150	QBS D/B - General Questionnaire	<i>DAS Website Document</i>
151	QBS D/B - Design Questionnaire	<i>DAS Website Document.</i>
152	QBS D/B - Build Questionnaire	<i>DAS Website Document.</i>

End