

MEMORANDUM No. 4

TO: Kentucky School Architects

FROM: Timothy K. Lucas
Planning Branch Manager, Division of Facilities Management

DATE: March 10, 2009

RE: School Project Consultant Selection

In our administration of school projects we continue to find situations with which we have not encountered or in which there is confusions. One of those situations is in the implementation of the requirement to solicit Architect/Engineers (A/E) and Construction Management (CM) services. This is primarily a district issue, but we are including the requirements for your review to help ward off problems that you see as district advertise for design and CM services.

Architect/Engineering and Construction Management Selection Process

Minimum Requirements

- If a project exceeds \$1,000,000 districts must enter into a process of selection for A/E services
- If a project exceeds \$2,000,000 districts must enter into a process of selection for CM services
 - CM services are not allowed on projects below \$1,000,000 w/o KDE approval
- The minimum requirement is to advertise in the Local Paper to select letters of interest from A/Es and CMs
 - The advertisements must be project specific (phased projects can be described)
 - Districts may advertise for multiple specific projects at one time
 - Open ended service contracts are not allowed.
- Or to contact at least (3) firms directly

STOP at this point a district can hire an Architect or CM

Best Practice for Seeking and Evaluating Proposals

- Advertise in Local Paper as noted above
- Solicit "Requests for Proposal" (RFP) from each firm that responds with a letter of interest
 - An RFP must be project specific (phased projects can be described)
 - An RFP may reference multiple specific projects at one time
 - An RFP cannot be for open ended service contracts.
- RFPs should evaluate by Local Selection Team (Could be local board)
- From the Requests for Proposal submitted, select a reasonable number for the selection team or local board to be interviewed.
 - Select 3/4 firms
 - Give at least two week's notice to Architects/Engineers and Construction Managers
 - Provide at least 30/45 min. for presentation and 15 min. Q/A

If a project has been specifically advertised as a multiphase project the district is not required to go through the process for each subsequent phase if they wish to continue with the same team. The district can simply develop a new BG-1 for each additional phase, and send a letter to that effect to KDE and proceed. Multiple phase projects will be administered from KDE as separate projects. If you have any questions, please do not hesitate to contact me at 502-564-4326.