

PROCESS GUIDE

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Board of Regents Office of Real Estate & Facilities

# **Qualifications Based Selections (QBS)**

OFFICE OF REAL ESTATE & FACILITIES

# QBS Process Guide

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## What is QBS?

### Qualifications Based Selection Method

In 1972, Congress passed a law that required the United States Federal Government to select professional consultants based on their competency, qualifications and experience rather than on fees for the services. Following the passage of that law (Brooks Act, Public Law 92-582), many states including Georgia, adopted this process for selecting the most qualified consultants for their public design and construction projects. In an effort to be consistent with other state agencies in adherence to the State Construction Manual, the Board of Regents implemented the QBS method, or a portion thereof, for all selections where the consultant fees are anticipated to exceed \$75,000.

## QBS Selection Methods

The Board of Regents uses three methods for selecting consultants based on their anticipated fees: [Direct Appointment Method](#), [Abbreviated Selection Method](#) and [Basic Selection Method](#). The parameters for each method are as follows:

- Direct Appointment – anticipated fees up to \$75,000
- Abbreviated Selection Method – anticipated fees between \$75,000 and \$300,000. This method utilizes Step II of the QBS process only.
- Basic Selection Method – anticipated fees above \$300,000. This method utilizes the full QBS process.

# QBS Process

## Preparing the RFQ/RFP

The first step in procuring consultant services is to prepare the Request for Qualifications/Request for Proposals (RFQ/RFP). The RFQ/RFP gives a general overview of the project, the expected scope of work for the consultant, the schedule of selection events and the submittal requirements for evaluation. At the Board of Regents, this is a two-step process. The RFQ (Step I), produces a shortlist of firms who will then submit their team proposal in response to the RFP (Step II). Following receipt of the proposals, each team will be interviewed by the selection committee and a final ranked list is presented for approval. A sample of the RFQ/RFP can be found in Appendix D.

1. **Scope of services** – For the selection of Design Professionals and Program Managers, the template RFQ includes a list of basic services that are expected of the consultant along with a list of other services that may be requested for a particular project. Items that do not pertain to the project should be lined through. For Construction Manager selections, the scope of services is outlined in their contract.
2. **Fees** – the fees listed in the RFQ/RFP or in subsequent correspondence are based on the size, complexity and budget of the project and include basic fees for design and construction administration services. Each consultant RFP/RFQ includes a fee proposal form (see Exhibit E) that will be submitted in a sealed envelope by each shortlisted team at the time of the interview. The fee proposals will not be opened or used in the selection process, but will be used for fee negotiations with the selected firm.
3. **Schedule of Events** - The timeframe to complete the Basic Selection Method process varies depending on the availability of the selection committee. The Board of Regents requests that the RFQ be posted for 21 consecutive days at a minimum. With that, it generally takes approximately 8 weeks at a minimum to complete the selection. The process includes the following events:
  - Posting of RFQ/RFP – 21 days (3 weeks)
  - Evaluation of Qualifications (Shortlisting) – at least 1 week
  - Site Visit for Shortlisted firms – at least 1 week from notification

- Q & A preceding submittal of Proposals – at least 1 week from site visit
  - Submittal of Team Proposals – at least 1 week from Q & A
  - Interviews (Final Selection) – 1 week from receipt of Team Proposals
4. **Committee Members** – Each selection committee will be comprised of five members. On BOR managed projects, three members will be from the BOR staff and two members will be from the campus. On GO bond funded projects that have a construction cost over \$5 million, one of the BOR spots may be delegated to GSFIC. The committee will receive instructions for the selection process along with their evaluation materials from the Selection Manager (see Exhibit F). On BOR managed projects, the Selection Manager will be the BOR Program Manager for the campus. In order to maintain consistency throughout the evaluation process, it is important that the makeup of the selection committee also be as consistent as possible.

### Advertising

All RFQ/RFP's should be posted on the [Georgia Procurement Registry](#) (GPR). For BOR managed projects, the posting of the RFQ/RFP and related documents will be done by the Office of Real Estate and Facilities and will be listed on the registry under the entity "Board of Regents (University System of Georgia)". Advertisements for projects that are managed by the campus can be posted by the campus procurement officer.

In the Abbreviated Selection Method, the Request for Proposals is not posted on the GPR, but is sent along with an Invitation to Interview to the selected firms.

### Qualifications Evaluation

1. **Submittals** - Statements of Qualifications should be submitted in accordance with the instructions in the RFQ. For BOR managed projects, they will be submitted electronically, unless otherwise noted. Each selection committee member should receive either a hard copy or electronic access to each submittal for the project.
2. **Evaluation Forms** - the Selection Manager should distribute evaluation (juror) forms to each committee member. The forms should already

be populated with the names of the firms who have submitted Statements of Qualifications. In addition to the individual evaluation forms, the Selection Manager should also have a composite form for use in determining the ranking of the firms based on all of the evaluations. (See Appendix E for sample forms)

3. **Shortlisting** – Each committee member is required to independently evaluate the qualifications of each submitting firm using the following criteria:
  - Stability of the firm
  - Firm’s relevant project experience and qualifications
  - Firm’s apparent suitability to provide services for the project

Each criterion carries a weight factor that is identified in the RFQ along with a more detailed explanation of what elements comprise that category. The total value of the evaluation is 100 percent (or points). It is imperative that each firm be evaluated in each of the three areas.

**\*Note: The minimum score in any individual category is “1”.**

4. **Shortlisting Conference** – the Selection Manager will schedule a shortlisting conference for the selection committee to discuss the firm’s qualifications and determine their ranking. Each committee member should submit their evaluation form to the Selection Manager so that their scores can be transferred to the composite form. Once the full ranking is established, the committee will select a shortlist of 3 to 5 firms for further evaluation. The number of shortlisted firms will vary depending on the size and complexity of the project or the point spread between them. For example, if there is only a one point difference between the 3<sup>rd</sup> and 4<sup>th</sup> ranked firms, the committee may choose to shortlist four instead of three.
5. **Shortlist Verification** – When the qualifications evaluation is completed, the Selection Manager should review the composite form to insure that it accurately represents the individual evaluation forms and sign the form. On BOR projects, the documents will then be reviewed by the AVC for Design & Construction for accuracy before being submitted to the Vice Chancellor for Facilities for approval.
6. **Shortlist Notification** – Once the shortlist has been approved by the Vice Chancellor for Facilities, the submitting firms will receive

notification that the shortlist has been posted in the “[Consultant Selections](#)” section of the Office of Real Estate and Facilities website. The shortlisted firms will receive individual correspondence with further instructions.

### Proposal/Interview Evaluation

1. **Submittals** – Team proposals should be submitted in accordance with the instructions in the RFP. For BOR managed projects, they will be submitted electronically, unless otherwise noted. Each selection committee member should receive either a hard copy or electronic access to each submittal for the project.
2. **Evaluation Forms** - the Selection Manager should distribute evaluation (juror) forms to each committee member. The forms should already be populated with the names of the firms who have been shortlisted. In addition to the individual evaluation forms, the Selection Manager should also have a composite form for use in determining the final ranking of the shortlisted firms. (See Appendix G for sample forms)
3. **Final Ranking** – Each committee member is required to independently evaluate the team proposals of each shortlisted firm using the following criteria:
  - Previous performance and references
  - Team qualifications and experience
  - Quality of proposed plan

In addition to the evaluation of the proposals, each committee member will also rate the firm’s interview based on the following:

- Methodology presented
- Team communications/project solutions

Each criterion carries a weight factor that is identified in the RFP along with a more detailed explanation of what elements comprise that category. The total value of the evaluation is 100 percent (or points). It is imperative that each firm be evaluated in each of the five areas.

4. **Deliberations** – Immediately following the interviews, the Selection Manager open a discussion of the individual firm’s interview and

overall impressions with the selection committee. If a previously selected project consultant (i.e. Program Manager, Design Professional) has witnessed all of the interviews, the committee should get their impressions first and then dismiss the consultant before deliberating. It would benefit the Selection Manager if comments are given for each interviewing firm. Feedback is often requested from the non-selected firms following notification. To get the final ranking, each committee member will give the selection manager their individual score sheet so that their scores can be transferred to the composite form.

5. ***Final Ranking Verification*** – When the proposal/interview evaluation is completed, the Selection Manager should review the composite form to insure that it accurately represents the individual evaluation forms. On BOR projects, the Selection Manager will sign the documents, which will then be reviewed by the AVC for Design & Construction for accuracy before being submitted to the Vice Chancellor for Facilities for approval. If Board action is required, the ranking will not be released until the Board has approved the selection.
6. ***Final Selection Notification*** – Once the final selection has been approved, the interviewing firms will receive notification that they have either been selected or not for the project. The selected firm will be posted in the “[Consultant Selections](#)” section of the Office of Real Estate and Facilities website.

### *Fee Negotiations*

At the conclusion of their interview, each firm will have given the Selection Manager their fee proposal in a sealed envelope per the requirements in the RFP. Only the fee proposal of the top ranked firm will be opened in order to begin the fee negotiations. The others will be either returned to the proposers. The fees allocated in the approved project budget should be used as a guide.

### *Contract Execution*

Following negotiation on the fees, the consultant and the owner will enter into a [contractual agreement](#) for services. It is recommended that the standard BOR contracts be used even if the “owner” is the campus. The consultant should perform no work prior to receiving authorization from the owner in the form of a Notice of Award.