

Policy Reference No. 8825

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Title: ARCHITECTURAL AND ENGINEERING

Effective Date:

SERVICES*

1 January 1982

Section: SUPPORT SERVICES

Revised: 6 June 2000

ARCHITECTURAL AND ENGINEERING SERVICES*

PROCEDURE

Services \$200,000 and Over

When architectural and engineering services are required by the District and the estimated amount of the contracted service will be \$200,000 or more per project, the following procedures will be followed:

1. Needs for services will be publicly announced stating at least the following:
 - 1.1 General nature and scope of the project.
 - 1.2 Address and phone number of the District representative who can provide the District's Consultant Data Form and further details regarding the selection criteria and screening process.
 - 1.3 Acknowledgement that women and minority-owned firms are encouraged to apply.
 - 1.4 Deadline for submission of proposal or letter of interest, the District Consultant Data Form and such other information as felt necessary by the applicant.

The District will make announcements for professional services in local professional and community publications of general circulation as well as in local publications oriented specifically toward women and minority-owned firms.

Firms interested in being considered for a project must submit their qualifications to the Capital Construction/Maintenance Office by the deadline stated in the announcement. If the firm has qualifications on file with the District, and such qualifications are for the current year, then the firm is to notify, in writing, the Capital Construction/Maintenance Office of the firm's interest in the project and the fact that its qualifications are on file and current.

2. When the deadline for submission has passed, all submissions by applicants shall be reviewed and ranked by the appropriate staff in accordance with weighted criteria

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appropriate for the project and profession under consideration. (See Exhibit 8825.1.A)

3. The firm(s) ranked highest in the initial screening process, section 2 above, shall then be interviewed by appropriate staff.

An architect or engineer external to the District, who is not an applicant for the project under consideration and who has expertise in the service required may also serve as an interviewer.

Among the firms to be interviewed not less than one will be a women or minority-owned firm. Such a firm will be the highest ranked women or minority-owned firm from the applicants that were initially evaluated. This procedure assumes that women or minority-owned firms were among the initial applicants. If there are none, this paragraph will not apply.

During the interview process the interviewers will discuss the firm's plans regarding the anticipated project and the relative utility of alternate methods for furnishing the required services.

4. At the conclusion of the interview phase, Section 3 above, the firm deemed most qualified will submit at a minimum the following before engaging in the negotiation of a contract:
 - 4.1 Description of the tasks to be completed.
 - 4.2 Person hours of effort planned for each task.
 - 4.3 Qualifications and categories of personnel who will be assigned to each task.
 - 4.4 Breakdown of pricing for the services to be provided.
 - 4.5 Time schedule for completion of all elements of the services to be provided.

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The District contract shall be reviewed in its entirety with the firm being considered before a final price is agreed upon.

In determining a price which the District identifies as being fair and reasonable, the District shall take into consideration the scope, complexity and professional nature of the project or service.

If the District is unable to negotiate a satisfactory contract with the firm selected at a price the District determines to be fair and reasonable, negotiations with that firm shall be formally terminated by letter and the District will initiate negotiations with the next highest ranked firm.

5. When a contract has been negotiated with a firm, the contract shall be referred to the Board of Directors for ratification.
6. At the completion of a project an evaluation of the services rendered by the firm will be conducted. This evaluation of services will be shared with the firm and placed in the project file.

Services Less than \$200,000

During the course of a year the District will require architectural and engineering services where the estimated cost of services per project is less than \$200,000. When such is the case, the following procedures will be followed:

1. On an annual basis a public announcement will be made stating the anticipated needs of the District for architectural and engineering services of less than \$200,000 per project.
The District will make its annual announcement for professional services in local professional and community publications of general circulation as well as in local publication(s) oriented toward women and minority-owned firms.

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2. The public announcement of anticipated needs shall include:
 - 2.1 Types of services
 - 2.2 Process to be used in selection
 - 2.3 Address and phone number of the District representative who can provide the District's Consultant Data Form and further details regarding the selection process.
 - 2.4 Acknowledgement that women and minority-owned firms are encouraged to apply.
3. Firms desiring to be considered for providing services shall be encouraged to apply for inclusion on the District's Architectural and Engineering Consultant Roster by submitting a statement of qualifications, performance data and the District's Consultant Data Form .
4. As projects arise, the qualifications on file of all applicants who provide the types of services required will be evaluated by appropriate Capital Construction/Maintenance staff.
5. The firm(s) evaluated highest for a specific project will be contacted prior to the interview to determine if they will be available to perform the service required.

The firm(s) evaluated highest and who responded that they will be available for services, shall then be interviewed.
6. The firm selected for the project as a result of interview shall, before engaging in the negotiations of a contract, submit at a minimum the following:
 - 6.1 Description of the tasks to be completed
 - 6.2 Person hours of effort planned for each task

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- 6.3 Qualifications and categories of personnel who will be assigned to each task.
- 6.4 Breakdown of pricing for the services to be provided.
- 6.5 Time schedule for completion of all elements of the services to be provided.

The District contract shall be reviewed in its entirety with the firm being considered before a final price is agreed upon.

In determining a price which the District identifies to be fair and reasonable, the District shall take into consideration the scope, complexity and professional nature of the project or service.

If the District is unable to negotiate a satisfactory contract with the firm selected at a price the District determines to be fair and reasonable, negotiations with that firm shall be formally terminated in writing and the District will initiate negotiations with the next highest evaluated firm.

- 7. When a contract has been negotiated with a firm, the contract shall be approved by the Superintendent or his/her designee.

*Includes land surveyors and landscape architects.

Past Revision: 5 March 1991