

Frequently Asked Questions – A/E Acquisition

Filling Out the 255 Form

- Q. If my company has a branch office, where do I put this information on the 255 form?
- A. The office location proposing to do the majority of the work on the project should be listed in Question 3 on the 255 form. If staff members from another office of the firm are to be involved in the project, that second office should be listed as a “consultant” in Question 6 with specific information as to what portion of the work the second office will handle. Likewise, the members of the firm’s “consultant” office should be included in Part A (Total Consultant Personnel) of Question 4 (Personnel by Discipline).
- Q. Do I fill in the total in-house personnel and total consultant personnel in Question 4 (Personnel by Discipline) or just those team members proposing to do the work on the project?
- A. You always need to fill in the total number of personnel by discipline in the firm. This information is used to determine the scoring for the firm’s office size (optimum number of registered professional staff) on the SAO Consultant Selection Rating Form. Please remember to list each person only once by primary function.
- Q. Does “architect” refer to registered architect and does “engineer” refer to professional engineer (P.E.) on Question 4 (Personnel by Discipline)?
- A. Yes. The SAO is asking for a total of all *registered* architects and engineers (registered in the State of Ohio) in Question 4. Graduate architects, architects in training, interns, architectural designers, M/E/P (mechanical/electrical/plumbing) designers and other non-registered personnel should be listed in the “other” spaces provided in Question 4. Only registered professionals are authorized to use the title “architect” or “engineer”.
- Q. What exactly are you looking for in regards to a “project team” for the proposed project in Question 7?
- A. The Sao is looking for those team members who have relevant experience as it relates to the proposed project. We want to know the important team members that you are proposing to actually use on a regular basis on the project. Specifically, this includes such team members as the project manager, project architect or engineer, lead designer, specification writer and construction administrator. We do not need to see resumes in Question 7 for CADD operators, drafting technicians, soil technicians, administrative assistants and other similar positions. Relevant information is project experience that most closely reflects the professional knowledge and expertise matching the advertised project. Be concise and specific in experience examples and information. If a team member has experience with another firm that relates to this project, include that experience as part of that person’s resume and simply state “experience with another firm”. A team organizational chart also is helpful to include.

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- Q. What exactly are you looking for in regards to project experience in Question 8 of the 255 form?
- A. The SAO is seeking to short list the most qualified firm to do the proposed work on a project. All relevant project experience should be listed with the most relevant projects listed first in Question 8. Look for key words or phrases listed in the Request for Professional Design Services advertisement and use this information to tailor your response to the project.
- Q. How should I respond to Question 10?
- A. Question 10 could be used to summarize your proposed team's best features or to organize the information so it flows or brings attention to the most important information you are presenting. It also could be used to explain how the lead firm and its consultants will work together as a team or to explain what portions of the work will be handled by a branch office. Elaborate on how well you have done on other projects relevant or similar to this project.
- Q. Can photos of projects be included?
- A. While photos and/or other graphics are not required, it is permissible to include photographs of similar or relevant project experience. Drawings, technical diagrams, flow charts, organizational charts and other graphics are also acceptable in Questions 8 and 10 and to a lesser extent in Question 7 of the 255 form.
- Q. Can I change the 255 form to include only one resume or one project example per page?
- A. Yes, you may alter the form and add spacing as you desire, within reason. Please make sure you keep the questions listed in the same order as they appear on the Standard Form.
- Q. How can I download the 255 form to my computer?
- A. Via the SAO web site at: <http://www.gsd.das.ohio.gov/sao/Forms/Associate.htm>. Click on the link for the downloadable version (Microsoft Word format). The forms are also included in the PDF and interactive PDF formats.

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A/E Interview Process

- Q. What are the criteria used for rating Associates in the interview process? Is there a rating form?
- A. A rating form with specific criteria is not used for the AE interview process. Firms are simply ranked in order of preference based on the project team, experience, capabilities and presentation at the interview by using what is called a “ranking form”. To view an example of the ranking form used by the State Architect’s Office visit our Web site at:
<http://www.gsd.das.ohio.gov/sao/Forms/RankingForm.pdf>.
- Q. What materials should I bring to the interview?
- A. Bring any materials or examples of work experience that best compliment or supplement your presentation. Drawings or sketches of proposed solutions to the project are not encouraged. The interviewee is encouraged to visit the Owner to discuss the project requirements. Verify with the Owner any specific presentation or electronic requirements proposed or recommended.
- Q. How many people will participate in the interview process?
- A. There will be at least four reviewers at the interview, two from the State Architect’s Office and two from the representing agency or state college or university. Please keep in mind an unlimited number of representatives may sit in on the interviews. Confirm with the Owner to ensure a sufficient number of handouts are prepared for the interviews.
- Q. Should I visit the job site prior to the interview? If so, who do I contract to arrange the site visit?
- A. We recommend that you set up a site visit prior to the interview to have a clear understanding of what the project entails. You should contact the Owner representative listed in the request for professional design services advertisement that was placed in the *Ohio Register* to set up your site visit. Visits at secure facilities may require special coordination requirements. Please verify this with the Owner.
- Q. Should I bring my entire project team to the interview, including consultants?
- A. We recommend that you bring the key individuals proposed to do the work on the project.

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Preparing the Technical Proposal

Q. What is a technical proposal?

A. It is a document that the recommended Associate prepares as an initial step of the contract negotiation. In it, the Associate states his/her understanding of the project requirements and indicates the fee expected to receive for services under the contract. We expect the Associate to visit with the Owner and review the program requirements prior to submitting the technical proposal. The technical proposal must include a narrative of the Associate's plans for the management of the proposed project, a breakdown of the project budget and the Associate's proposed fees for basic and additional services, and estimates of reimbursables for printing, plan approval and permit costs, property and topographical surveys, testing, etc. We also ask the Associate to provide a proposed project schedule from pre-design services through the construction warranty period, following the identified phases of the Associate's contract.

Q. Why is the technical proposal required?

A. All of this information is necessary to properly prepare and negotiate the contract for professional services. The fees for basic and additional services, reimbursables, any language of specific contract requirements, program understanding and project management are discussed and agreed upon in the negotiation. The technical proposal document is used to confirm all these issues and is attached to, and becomes a part of, the Associate's Professional Services Agreement.

Q. What happens if the technical proposal does not reflect the outcome of the negotiations?

A. Before the contract is finalized, the Associate will update the technical proposal to conform to the conditions resulting from the negotiation.

Q. What is the project budget and fee summary sheet attached to the request for technical proposal?

A. The Associate utilizes this project budget and fee summary sheet to propose the overall project budget costs based on information in the *Ohio Register* advertisement and review of the project requirements with the Owner. Items include estimated construction costs, professional services fees and reimbursables, allowances, moveable equipment costs, percentage for art, basic and additional services fees, reimbursables for printing of bidding documents, plan approval and permit costs, boundary and topographical survey costs, testing services and other expenses that are proposed for the project. To view or download an example of the project budget and fee summary sheet (i.e., the Associate contract summary sheet) go to:
<http://www.gsd.das.ohio.gov/sao/saofirms.htm>.

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- Q. What criteria are used to calculate the Associate's fees for a project?
- A. The SAO includes a target fee in the *Ohio Register* project advertisement. SAO considers that target fee reasonable based on historical fees of similar projects and services. The target fee could be strictly a basic service fee or an all-inclusive fee representing the basic services fees plus all other consultant and additional services fees. It is extremely important that the Associate reads and understands the description of services expected for the stated target fee. For more information about calculating Associate fees, contact the project manager or project coordinator assigned to the project.
- Q. Can the fees change from the target fees in the advertisement?
- A. Yes, the Associate's contract and fees are based on the results of the negotiation.