



Your Options for Procuring Designer Services

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MassDOT Procurement Practices

- Federal Law
 - Public Law 92-582 (“Brooks Act”)
- State Law
 - MGL Chapter 7, Section 38P
- MassDOT Standard Operating Procedures
- Architects and Engineers Review Board



A&E Review Board

- Members and Meetings
- Prequalification
- Selection Procedures
 - RFR
 - Streamlined
- ✓ Resource – Prequalification Information
 - <http://www.mhd.state.ma.us/default.asp?pgid=content/prequal01&sid=about>



Municipal Project Guide

- MassDOT / ACEC Document
- Provides Perspective on Relationships
- Stresses Importance of Soliciting and Retaining Qualified Consultants
- Provides a One-Page, Step-by-Step Project Summary Guide
- Provides Consultant Procurement Guidelines
- ✓ Resource – Municipal Project Guide
 - <http://www.mhd.state.ma.us/default.asp?pgid=content/publicationmdp&sid=about>

Project Summary Guide

| Municipal Project Summary Guide <i>Helping Communities Move Projects Forward</i> | | | |
|--|---|---|---|
| Project Inception | Consultant Procurement | Environmental, Design and ROW | Construction |
| <i>Project Identification and Need</i> | <i>Planning and Preparation</i> | <i>Environmental Process</i> | <i>Advertising and Bidding</i> |
| <ul style="list-style-type: none"> Project Development Preliminary Screening by District Prepare Project Need Form (PNF) Submit PNF to MassDOT District Conduct PNF Evaluation (MassDOT) | <ul style="list-style-type: none"> Conduct Qualifications-Based Selection (QBS) Process Develop a Procurement Plan Develop an Initial Scope of Services Develop a Cost Estimate/Budget Develop a Project Schedule Prepare RFR | <ul style="list-style-type: none"> Identify Necessary Environmental Approvals and Permits Obtain Necessary Environmental Permits and Clearances <ul style="list-style-type: none"> Laws and Regulations Regulatory Thresholds Permitting Clearance Timelines | <ul style="list-style-type: none"> Advertise Project for Construction Issue Addenda as Needed Bid Opening Municipal Agreement (10% Agreement) |
| <i>Project Planning</i> | <i>Selection Process</i> | <i>Design Process</i> | <i>Project Start-Up</i> |
| <ul style="list-style-type: none"> Define Existing Context, Confirm Project Needs Establish Goals and Objectives Initial Public Outreach Project Definition Project Review and Refinement Final Recommendations (Planning Report, if required) | <ul style="list-style-type: none"> Provide Public Notice of the RFR Receive and Evaluate Proposals Rank and Short-List Firms Conduct Interviews Final Ranking and Selection | <ul style="list-style-type: none"> Conduct Public Outreach Obtain Necessary Ground Survey Data Prepare 25% Design and Obtain Necessary Design Exceptions Conduct Design Public Hearing Prepare 75% Design Prepare 100% Design Finalize Non-Participating Items Prepare Final Cost Estimate Confirm Adequate Funding Available Obtain Traffic Control Agreement and Maintenance Agreement, as Required | <ul style="list-style-type: none"> Construction NTP Pre-Construction Meeting Resident Engineering |
| <i>Project Initiation</i> | <i>Negotiation and Agreement</i> | <i>Utility Coordination</i> | <i>Construction Phase Services</i> |
| <ul style="list-style-type: none"> Project Initiation Form (PIF) Preliminary Screening by District and MPO PRC Review Preliminary MPO Review Preliminary Assignments | <ul style="list-style-type: none"> Develop Final Scope of Services Request a Fee Proposal Negotiate Fee Execute a Consultant Agreement Provide Post-Selection Feedback | <i>Right of Way Process</i> | <ul style="list-style-type: none"> Coordinate with MassDOT Resident Engineer Engage Designer to: <ul style="list-style-type: none"> Review Shop Drawings Respond to Request for Information Attend Periodic Site Visits Attend Construction Job Meetings Review Change Orders |
| | <i>Managing the Contract</i> | <i>Right of Way Process</i> | <i>Project Completion</i> |
| | <ul style="list-style-type: none"> Identify Right of Way Actions Obtain Necessary Right of Way (may require City Council or Town Meeting Approval) | <i>TIP Programming</i> | <ul style="list-style-type: none"> Final Inspection Construction Close-Out Project Turnover to Municipality |
| Outcomes | | | |
| <ul style="list-style-type: none"> Decision Whether to Advance Project Guidance/ Support By MassDOT and MPO to Move Project Forward Possible TIP Year Tentative Project Category Tentative Funding Category | <ul style="list-style-type: none"> Consultant Selection Professional Services Agreement | <ul style="list-style-type: none"> Complete Plans, Specifications and Estimated for the Project All Necessary Environmental Permits and Clearances Obtained All Necessary Right of Way Obtained A Project Ready to be Advertised for Construction | <ul style="list-style-type: none"> Completed Construction Project Satisfied Constituents |



Project Summary Guide

Environmental Process

- Identify Necessary Environmental Approvals and Permits
- Obtain Necessary Environmental Permits and Clearances
 - Laws and Regulations
 - Regulatory Thresholds
 - Permitting Clearance Timelines



Consultant Procurement

- QBS
- Planning and Preparation
- Selecting a Consultant
- Negotiating a Contract



Consultant Procurement

- Planning and Preparation
 - Develop Procurement Plan
 - Develop Scope of Services, Schedule and Budget
 - Prepare RFR
- ✓ Resource – Standard Scope of Services Template
 - <http://www.mhd.state.ma.us/default.asp?pgid=content/publicationwchr&sid=about>



Consultant Procurement

- Selecting a Consultant
 - Provide Public Notice of the RFR
 - Receive and Evaluate Responses
 - Rank and Short-List
 - Conduct Interviews
 - Final Rank, Select and Notify



Consultant Procurement

- Negotiating a Contract
 - Develop Final Scope of Services and Schedule
 - Request Fee Proposal
 - Negotiate the Fee and Finalize the Scope
 - Execute Agreement
 - Provide Post-Selection Feedback



Additional Reference Materials

- Contact Information
- Program Information
- Manuals and Guidance Documents
- Miscellaneous Tools



Thank You!

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<http://www.massdot.state.ma.us/highway/>