

Managing Professional Services

Statement of Qualification List

Council Presentation

Council Feedback

- **Does Council agree with the goals and recommended changes to the City's selection, awarding, and contracting of Professional Services?**

Purpose of Presentation

- Discuss refining the process in awarding and contracting Professional Services
- Ensure policy guides the City staff to adhere to State Law and Council priorities
- Establish expectations for the citizens in the City of Georgetown to ensure City staff is operating in a fair and equitable manner when awarding Professional Service contracts

Selection and Awarding Contracts

- **Currently there are two ways COG selects and awards contracts to firms for Professional Services related to Architecture, Engineering and Surveying as defined by Texas Government Code 2254**
 - Project specific Request for Qualifications solicitations, and
 - Selecting a firm for a Pre-Qualification list
- **Request for Qualifications solicitation are always used for Construction Architecture**
- **This Presentation will focus on the Pre-Qualification List for**
 - Engineering,
 - Landscape Architecture, and
 - Surveying

Background – State Law

- **Texas Local Code 2254 Sub Chapter A defines Professionals Services:**
 - Within the practice , as defined by State Law, of : Accounting; Architecture; Landscape Architecture; Land Surveying; Medicine; optometry; Professional Engineering; Real Estate Appraising; or Professional Nursing (Legal added by Charter)
- **Selection of Provider of these services must be selected by:** Demonstrated competence and qualifications and for a fair and reasonable price
- **Award of contract for services of Architect, Engineer or Surveyor shall** first select the most highly qualified provider of those services on the basis of demonstrated competence and qualifications and then attempt to negotiate with the firm on a fair and reasonable price.

Background – Request for Qualifications

- **The City has a Request for Qualifications solicitation document used to request Statements of Qualifications for 10 disciplines within the practice of Architecture, Engineering and Surveying including :**
 - Transportation Services
 - Water Services
 - Energy Services
 - SCADA
 - Fiber Optic
 - Conservation
 - Geotech CME
- **This is a continuous ongoing process to accommodate new firms wishing to do business with the City.**

Current Procedure for Pre-Qualified List

- A Firm contacts COG indicating interest in providing Professional Services
- Purchasing sends the firm a Request for Qualifications
- Purchasing receives the response from the firm and reviews for correctness
- Purchasing sends Statement of Qualifications to proper Team Leader
- Team Leader selects Evaluation Team to review, score and rank SOQ

Current Contracting Process

We award and execute Master Service agreements to assign Task Orders for services

Master Service Agreements are contracts to outline contractual terms and conditions between the COG and a Professional Services firm. The Term is currently 5 years

Task Orders are issued pursuant to the Master Service Agreement and are for specific projects with specific scope of work including deliverables and price

Each Master Service Agreement is approved by Council and Each Task Order over \$50,000 is approved by Council

Master Service Agreements are not created until a Task Order is needed

Process and Procedure Challenges

- Documenting award process to most highly qualified provider of Professional Services
- Time spent by department to award individual contracts or Task Orders
- Fairness to business community wishing to do business with the City of Georgetown
- The time and resources to evaluate many proposals in one single time period
- Adding new firms to be considered for future projects
- Maintaining rankings when scored at different periods
- The number of categories to manage rotating lists
- Tracking number of awards to each firm to show equality.
- Removing bias perception of Business community
- Five-year agreement before new qualifications are submitted

Goals of Improved Process

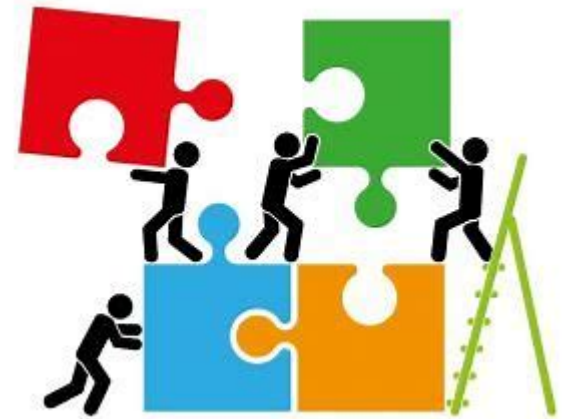
- **Satisfy the Texas state law of Professional Service**
 - Select the most highly qualified firms on the basis of demonstrated competence and qualifications, then negotiate fair and reasonable price
- **Meet City Council priorities and expectations**
- **Transparency of Selection process and rankings**
- **Efficient process for department to contract with qualified and competent firms**
- **Fair process for business community wanting to Do Business with the City**

Vetting Process to meet Goal Expectations

- **Regularly schedule RFQ vs Open End RFQ**
 - Issue every three (3) years
 - How to include new Suppliers onto the pre-qualified list
 - Divide solicitation dates by category. Less strain on staff
 - How to rank based on current SOQ vs one submitted in a previous period
- **Score and Ranking by Category**
 - How do we rank by discipline rather than by overall proposal
- **Selection for Pre-Qualified list**
 - Establish most fair and responsible process that is compliant with State law and City policy

Timeline to Complete Policy

- **Goal – September 21, 2021**
 - Bring policy to Council for review and discussion
- **Establish meetings with Stakeholders to draft policy and procedure**
 - Meeting Biweekly to Monthly until completion of P&P



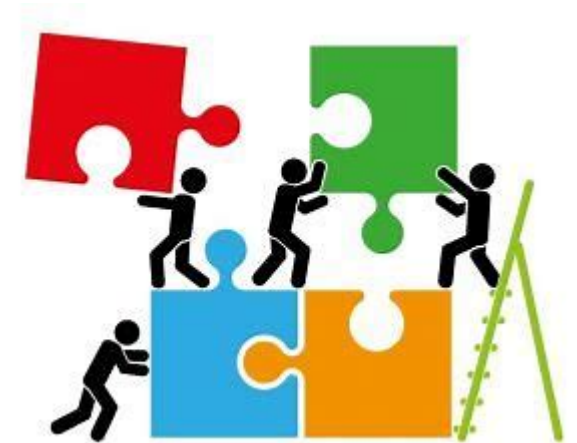
Timeline to Complete Policy

- **Goal – September 21, 2021**

- September –Bring policy to Council to finalize..
- October – RFQ advertised
- November – SOQs received
- December – SOQs reviewed
- January – SOQ/MSA results approved/shared by Council (optional?)
- February – Initial task orders negotiated with selected firms
- March – Task Orders to GTAB and Council for approval
- April – Design begins on first 2021 Road Bond Projects

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