April 5, 2013

TO:        Keith Metcalf, Eastern Region
           Dan Sarles, North Central Region
           Lorena Eng, Northwest Region
           Kevin Dayton, Olympic Region
           Don Whitehouse, South Central Region
           Donald Wagner, Southwest Region
           Craig Stone, Toll Division Director
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FROM:       J. C. Lenzi, Chief Engineer
            Assistant Secretary of Engineering & Regional Operations
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SUBJECT:   Project Delivery Memo #13-01 – Second Tier Competition

PURPOSE AND DIRECTION

Background

The intent of this Project Delivery memo is to formalize the use of second tier competition when selecting firms to perform work from Consultant Services on-call rosters. I want to also recognize that many of you have already been employing second tier competition when selecting consulting firms to perform various work for the department.

Attached are the formal procedures that detail the use of Second Tier competition when utilizing consultants from WSDOT’s on-call consultant rosters.

Projects Affected

Each project shall utilize the attached procedures where consultants are expected to be utilized to perform work using the WSDOT on-call consultant rosters.

ACTIONS REQUIRED

Development Division
Revise affected Consultant Procedures Manual to include the attached procedures.

Regions/Modes
Effective immediately utilize the attached procedures.
JCL/PBIII/rsz

Attachment

cc: Region Project Development Engineers
    Region Construction Engineers
    Region Program Managers
    Region Traffic Engineers
    Pasco Bakotich
    Jeff Carpenter
    John Nisbet
    John Milton
    Jay Alexander
    Jugesh Kapur
    Brenda Nnambi
    Don Petersen, FHWA
March 2013 – FOR IMMEDIATE ACTION

Consultant Services – On Call Agreements
Second Tier Competition Process Steps

Prior to negotiating and executing task orders for services under the On Call agreements, the need for a second-tier competition must be conducted as shown below. In the event of unusual circumstances, only the CSO Manager, or designee, may grant an exception to this process.

- $0 - $10,000 Customer may select directly from the list
- $10,001 - $20,000 Customer must document discussions with at least 3 firms prior to selection
- $20,001 and higher Customer must engage in the formal process outlined below

** dollar amounts shown above represent the TOTAL task order value including amendments

FORMAL PROCESS – Task Orders of $20,001 and higher:

1. Customer (Purchaser) develops a “draft scope of work” outline, including a cost estimate for the work scoped.

2. Customer, in consultation with either the Area Consultant Liaison (ACL) or HQ CSO determines appropriate On Call Roster (Type of Work) to be utilized. A complete listing can be found at the following: (http://www.wsdot.wa.gov/Business/Consulting/Agreements/default.htm)

3. Customer and ACL reviews On Call Consultant roster and selects an appropriate number of related consultants for competition.

   Multiple firms. Customer(s) shall solicit responses from "multiple firms" in selecting a consultant. "Multiple" firms mean a reasonable number of parties considering such factors as type of services needed, cost, schedule, and availability. The offer is to be issued to, at a minimum, not less than 50% of the firms on the list. If fewer than 50% of the firms are contacted, an explanation is to be included in the contract file as to why more firms were not invited to participate.

   Note: if there are 6 or fewer qualified firms on the roster/list, the customer and ACL shall solicit all firms.

4. ACL and Customer develop Request for Additional Information (RFAI) documentation.

   Note: Examples and Templates are available from HQ CSO if needed.

5. ACL and Customer formally communicate, via email, the 2nd Tier Competition opportunity. The appropriate Request for Additional Information (RFAI) documentation shall be attached to the outgoing email.

   Recommended that HQ CSO staff be included as a cc.

6. Consultants submit Responses to ACL/Customer via email by the Response Due Date & Time, as specified by the in their RFAI documentation.

7. ACL and Customer conduct evaluation of all responding consultant Responses and make selection.


9. Consultant performs work and submits proper invoices to Customer for payment, per the Payment terms outlined in the Master On Call Services Agreement.

Consultant Services Staff Contact Information

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http://wsdot.wa.gov/business/consulting