Checklist for Competitive Selection of Consultant or Contractor

All goods and services must be procured by written contract or written agreement.

When value of goods or services is expected to be under $5,000.

- No special procedures needed.
- Every effort should be made to make an advantageous agreement\
- Decisions may be made based on informal discussions with qualified persons or firms but should consider qualifications and availability of the vendor to perform the work.

When value of goods or services is expected to be $5,000 to $24,999 in a single purchase or in multiple purchases from the same vendor.

☐ Submit your draft RFP to the SHPO Grants Staff for written approval.

- Be sure to describe the selection process and objective standards you will use to make your hiring choice.

☐ Send your RFP directly to a minimum of three qualified vendors with whom to informally negotiate prior to selection and execution of a contract.

☐ Post your RFP publicly for a recommended 21 days prior to the date stated for receipt of bids, but no less than 3 days.

☐ Receive bids/proposals and evaluate them following the process outlined in the RFP.

☐ Submit documentation to SHPO showing that your selection process followed these steps.

- Approval of this process by the SHPO is required <u>prior</u> to the awarding of a contract.

  ☐ List of all consultants you contacted directly.
  ☐ Documentation of the public posting.
  ☐ Copies of all proposals received and correspondence from anyone declining to bid.
  ☐ Explanation of your selection process and why you chose your preferred candidate.

☐ Receive **written approval** for the selection process and consultant from the SHPO Grants Manager to proceed with the negotiation of a contract.

When value of goods or services is expected to be $25,000 to $49,999 in a single purchase or in multiple purchases from the same vendor.

☐ Submit your draft RFP to the SHPO Grants Staff for written approval.

- Be sure to describe the selection process and objective standards you will use to make your hiring choice.
- The award will be made to the responsive, qualified, and responsible vendor whose bid for the described work is the most advantageous to the project.
- Minimum qualifications may be established for bidders prior to bidding, but they must be explained in the RFP.
- RFP must request bidders to submit **sealed** bids. All bids must be sealed when received and will be opened in public at the hour stated in the notice.

☐ Post your RFP publicly for a recommended 21 days prior to the date stated for receipt of bids, but no less than 3 days.

cont.

☐ It is recommended, but not required, to send your RFP directly to a minimum of three qualified vendors requesting sealed bids.

☐ Receive **sealed** bids as indicated in the RFP. Evaluate them following the process outlined in the RFP.

☐ Submit documentation to SHPO showing that your selection process followed these steps.

- Approval of this process by the SHPO is required prior to the awarding of a contract.

  ☐ List of all consultants you contacted directly.
  ☐ Documentation of the public posting.
  ☐ Copies of all proposals received and correspondence from anyone declining to bid.
  ☐ Explanation of your selection process and why you chose your preferred candidate.

☐ A letter or email indicating when and where the bids were opened along with a list of attendees at the opening.

☐ Receive **written approval** for the selection process and consultant from the SHPO Grants Manager to proceed with the negotiation of a contract.

When value of goods and services is expected to be $50,000 or more in a single purchase or in multiple purchases from the same vendor.

☐ Submit your draft RFP to the SHPO Grants Staff for written approval.

- Be sure to describe the selection process and objective standards you will use to make your hiring choice.
- The award will be made to the responsive, qualified, and responsible vendor whose bid for the described work is the most advantageous to the project.
- Minimum qualifications may be established for bidders prior to bidding, but they must be explained in the RFP.
- RFP must request bidders to submit **sealed** bids. All bids must be sealed when received and will be opened in public at the hour stated in the notice.

☐ Post your RFP publicly for a recommended 21 days prior to the date stated for receipt of bids, but no less than 10 days.

☐ Send your RFP directly to a minimum of three qualified vendors requesting sealed bids.

☐ Receive **sealed** bids as indicated in the RFP. Evaluate them following the process outlined in the RFP.

☐ Submit documentation to SHPO showing that your selection process followed these steps.

- Approval of this process by the SHPO is required prior to the awarding of a contract.

  ☐ List of all consultants you contacted directly.
  ☐ Documentation of the public posting.
  ☐ Copies of all proposals received and correspondence from anyone declining to bid.
  ☐ Explanation of your selection process and why you chose your preferred candidate.
  ☐ A letter or email indicating when and where the bids were opened along with a list of attendees at the opening.

☐ Receive **written approval** for the selection process and consultant from the SHPO Grants Manager to proceed with the negotiation of a contract.

cont.

Contracting

After receiving written approval of consultant selection from the SHPO Grants Staff, the following concludes the consultant selection process.

☐ Submit to SHPO Grant Staff a **draft contract** between the property owner and consultant.

☐ Receive a **written approval** of the draft contract from the SHPO Grants Manager before signing.

☐ Submit a signed copy of the approved contract back to the SHPO Grants Manager within 30 days of it being signed by the consultant and property owner.

General Notes for Competitive Selection

- ❖ Contract awards will not be made to a former employee, contractor, or professional who has developed or has drafted bid specifications, requirements, a statement of work, an invitation for bids, and/or a request for proposals for a particular procurement.

- ❖ Contracts and written agreements must contain the following:
  - A start date and completion date for services
  - Total fee for services
  - Description of services
  - Acknowledgement that the property is listed in the state and/or National Register of Historic Places
  - The phrase "All work must follow the Secretary of Interior's *Standards for the Treatment of Historic Properties*"
  - Notification that all changes to the contract must be agreed to in writing.

- ❖ Grantee must retain signed contracts on file for a period of five (5) years after acceptance by the SHPO of the final completion report.

- ❖ SHPO will not pay consultants or contractors directly nor will it mediate any disagreements between Grantee and contracted consultants or contractors. SHPO is not responsible for any damages or liabilities resulting from dissolution of a contract between Grantee and contracted consultants or contractors.