

FINANCIAL MANAGEMENT

7408

Entering into Professional Service Contracts with Design Professionals, Construction Managers, and Professional Land Surveyors—The Request for Qualifications Policy

Selection of Public Works Professionals to be Based on Qualifications

Notwithstanding any other provision of law to the contrary, ~~it shall be the policy of this state that all public agencies and political subdivisions of the State of Idaho and their agents~~ **the District and their agents** shall make selections for professional engineering, architectural, landscape architecture, construction management, and professional land surveying services, by persons and firms licensed pursuant to Idaho law to perform such professional services, on the basis of qualifications and demonstrated competence and shall negotiate contracts or agreements with the licensed professional(s) selected to provide the requested professional service(s).

For such contracts of \$30,000 or more per year, the District shall publish the following information within 15 days on the State Controller's website:

- 1. The parties;**
- 2. The amount of the contract; and**
- 3. A one sentence description of the contract's purpose.**

Additionally, such contracts shall be published as required in Policy 4130 Public Access to District Website.

No proposal, bid or qualifications **for contracts of \$100,000 or more** shall be accepted or denied based on environmental, social, and governance (ESG) standards, including screening or scoring bids, in ~~while~~ **whole** or in part, on subjective ethical or sustainability criteria unrelated to the specifications in a solicitation or qualifications of a bidder.

Procedures to Select Public Works Professionals for Contracts Greater than ~~\$50,000~~ **\$100,000**

In carrying out this policy the Board shall use the following guidelines when securing contracts for engineering, architectural, landscape architecture, construction management, and land surveying services on projects for which the professional service fee is anticipated to exceed the total sum of ~~\$50,000~~ **\$100,000** excluding, however, those professional services contracts previously awarded by the District for an associated or phased project, and for which the expenditure is otherwise exempt from the bidding process otherwise required by law. To implement this policy:

1. The Board or its designee will provide a general description of the services being solicited and encourage persons or firms engaged in the services being solicited to submit statements of qualifications and past performance data.
2. The Board or its designee will establish and make available to the public a request for qualifications that includes the criteria and the procedures to be used for measurable scoring, ranking, and selection of qualified persons or firms to perform such services.
3. After receiving responses to a request for qualifications, the Board or its designee shall score and rank the responding persons and firms based on their qualifications and demonstrated competence pursuant to the Board's or its designee's established criteria and procedures. The list of ranked respondents, including the scoring used to develop the ranking, shall be made available to the public. Some examples of selection criteria for consideration may include but are not limited to:
 - A. A description of the firm, including its location and longevity;
 - B. Its past performance;
 - C. Its project manager and key staff experience, education, and training;
 - D. Its experience with similar projects;
 - E. Its specific approach to projects or assignments;

- F. Its proposed schedule, if applicable; and
 - G. Its quality control procedures.
4. The Board or its designee shall select for negotiation the persons or firms whom the ~~public agency or political subdivision~~ District determines to be the highest-ranked and best qualified.
 5. The Board or its designee shall next negotiate with the highest-ranked person or firm for a contract or an agreement to perform such services at a price determined by the District to be reasonable and fair to the public after considering the estimated value, the scope, the complexity, schedule, and the nature of the services required.
 6. In the event the Board or its designee is unable to negotiate a satisfactory contract or agreement with the highest-ranked person or firm, it shall formally terminate negotiations and undertake negotiations with the next highest-ranked person or firm, following the procedure prescribed above.
 7. In the event the Board or its designee is unable to negotiate a satisfactory contract or agreement with any of the selected persons or firms, it may recommence negotiations as described in the two items immediately above, until a contract or agreement is reached, or may, in its discretion, cancel the procurement.
 8. **Published Request for Qualifications.** When the Board solicits proposals for qualifications for engineering, architectural, landscape architecture, construction management, or land surveying services, for which the professional service fee is anticipated to exceed the total sum of ~~\$50,000~~ \$100,000, it shall publish public notice in the same manner as required for procurement of public works construction projects set forth at Procedure 7405P, which sets forth the procedures required by Section 67-2805(2) of Idaho Code.
 9. **A List of Qualified Professionals.** In fulfilling the requirements of the items above, the Board may establish and select from a list of two or more persons or firms selected and preapproved for consideration by the ~~public agency or political subdivision~~ District. When creating a preapproved list of qualified professionals, the Board or its designee shall first publish notice as set forth in the item immediately above. When selecting from such list, no notice shall be required; and
 10. Any list established under this item will be valid for up to five years, unless canceled by the Board prior to the list's expiration where the Board has first determined in open session that cancellation of the would be in the public's best interest.

Procedures to Select Public Works Professionals for Contracts Less than ~~\$50,000~~ \$100,000

When securing contracts for engineering, architectural, landscape architecture, construction management, or land surveying services on projects for which the professional service fee is anticipated to be less than the total sum of ~~\$50,000~~ \$100,000, the Board may use the guidelines set forth in the above paragraphs, or may establish its own guidelines for selection based on demonstrated competence and qualifications to perform the type of services required, which shall then be followed by negotiation of the fee at a price determined by the Board to be fair and reasonable after considering the estimated value, scope, complexity, schedule, and nature of services required.

Approvals for Phased Projects

When the Board has previously awarded a professional services contract to a person or firm for an associated or phased project, ~~public agency or political subdivision~~ District may, at its discretion and in accordance with all provisions of Section 59-1026 of Idaho Code, negotiate an extended or new professional services contract with that person or firm.

Cross References: 7405P

Procuring Public Works, Services, and Personal Property

Legal References

IC § 59-1026

I.C. § 67-2320

I.C. § 67-2347

IC § 67-2803

I.C. § 67-2805

Description

Willful and Knowing Avoidance of Competitive Bidding and Procurement Statutes

Professional Service Contracts with Design Professionals, Construction Managers and Professional Land Surveyors

Prohibition of Environmental, Social, and Governance Standards in Public Contracts

Exclusions

Procurement of Public Works Construction

IC § 67-2810

Publication of Contractee, Amount, and Purpose of Personal Service
Contracts -- Definition

Other Reference: Policies and Procedures Used Template, Idaho State Department of Education,
<http://www.sde.idaho.gov/sped/funding/>

Cross Reference

Code	Description
4130	Public Access to District Website
7400	Miscellaneous Procurement Standards
7400-P1	Miscellaneous Procurement Standards - Federal Award Requirements
7400-P(2)	Miscellaneous Procurement Standards - Procurement Methods Under a Federal Award
7400-P(3)	Miscellaneous Procurement Standards - Requirements and Restrictions for Procurement Under a Federal Award - Competition
7405	Public Works Contracting and Procurement
7405-P1	Public Works Contracting and Procurement - Procuring Public Works, Services, and Personal Property

Policy History:

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