

# Recommended Practices for Selecting an Architect for K-12 Educational Facilities

**Roy J. Sprague, Jr. AIA, CSI**  
**Assistant Superintendent of Facilities & Construction**  
**Cypress-Fairbanks Independent School District**

**Scott Layne**  
**Assistant Superintendent for Support Services**  
**Irving Independent School District**



# Agenda

- ❑ Introduction
- ❑ Selection Requirements for Professional Services
- ❑ Timing of Hiring an Architect
- ❑ Publication Requirements
- ❑ Evaluation and Selection Committee
- ❑ Request for Statements of Qualifications
- ❑ Reference Questionnaire
- ❑ Ranking/Scoring of Qualifications
- ❑ Short Listing for Formal Interviews
- ❑ Interview Process and Requirements
- ❑ Final Selection Process and Approvals
- ❑ Fee Negotiation
- ❑ Forms of Agreement Between Owner and Architect
- ❑ Debriefing of Architectural Firms
- ❑ Closing

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# Introduction

## AGC/CEFPI Joint Task Force Projects

- Recommended Practices on CMAR
- Recommended Practices on CSP
- Recommended Practices on Selecting an Architect
- Committee Process
- Committee Members
  - Architects
  - Owners
  - General Contractors
- Comments and Suggestions Form

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# Selection Requirements For Professional Services

- ❑ Texas Statute Chapter 1051 – Architect Required If:

**New Educational Facilities Over \$100,000**

**Alterations/Additions Over \$50,000 That Involve Removal, Relocation or Addition of Walls or an Alteration or Addition of an Exit**

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# Selection Requirements For Professional Services

- ❑ **Texas Government Code Chapter 2254**

- Selection Must Be Based on Qualifications, Not Cost**
  - Negotiate Fee After Selection is Made**

- ❑ **If a Satisfactory Fee Can't be Negotiated**

- Formally Close Negotiations**

- Select Next Highest Qualified Architect**

- Negotiate Fee**

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# Selection Requirements For Professional Services

## ❑ Texas Board of Architectural Examiners Professional Conduct

***“PROFESSIONAL SERVICES PROCUREMENT ACT An Architect shall neither submit a competitive bid to nor solicit a competitive bid on behalf of any governmental entity that is prohibited by the Professional Services Procurement Act, Chapter 2254, Government Code, from making a selection or awarding a contract on the basis of competitive bids. An Architect may submit information related to the monetary costs of a professional service, including information found on a fee schedule, only after the governmental entity has selected the Architect on the basis of demonstrated competence and qualifications pursuant to the Professional Services Procurement Act.”***

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# Selection Requirements For Professional Services

## ☐ Selection Committee

### School Board Participation

***“ If a committee comprising one or more members of the board of trustees of a school district meets to discuss public business or policy, the committee itself is subject to the Texas Open Meeting Act”***

*AG Opinion JM-1072, July 12, 1989*

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# Selection Requirements For Professional Services

## Selection Committee

*“ An Evaluation Committee appointed by the Smith County Commissioners Court to recommend the selection of an architect and negotiate a contract with the selected firm is, under the facts described, a governmental body subject to the Open Meetings Act.*

*If, however, the county judge and one commissioner are excluded from the Committee, it becomes merely an advisory board not subject to the Act”*

*AG Opinion JC-0060, June 2, 1999*

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# Selection Requirements For Professional Services

## Contractual Authority

In regard to contractual authority, only the Board of Trustees may bind a school district. The Board must authorize the administration to enter into a binding contract with any third party including an architectural firm.

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# Timing of Hiring an Architect

- ❑ Evaluation of Facility Needs

- ❑ Funding

- ❑ Bond Program Planning

  - Consultant Assistance

  - Establish Consultant Scope of Work, Expectations

- ❑ Time Lines

  - Fast Growth School Districts

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# Publication Requirements

- Texas Government Code 2254 Does Not Require School Districts to Publish Advertisements when Hiring an Architect
- Texas Education Code 44.036 Requires Publication when Using Design Build Procurement Method

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# Evaluation and Selection Committee

- Determine a Methodology for Selecting an Architect
- Local Policy Board Policy
- Establish the Selection Committee's Authority
- No Legal Requirement for Board to Approve Process
- Who Should Be on the Selection Committee?
- Identify One Person to Serve as the District's Contact
- Committee Member Responsibilities

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# Request for Statements of Qualifications

- Scope of Services
- Project Information
- Submission Format and Clarifications
- Identify District Contact Person
- Selection Timeline
- Submission Form

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# Request for Statements of Qualifications

## RFQ Submission Form

- Tab 1 – Firm Information
- Tab 2 – Management Style and Philosophy
- Tab 3 – Firm Reference
- Tab 4 – Project Team
- Tab 5 – Forms Appropriate to District
- Tab 6 – Supplemental Information

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# Reference Questionnaire

- 19 Suggested Evaluation Criteria, Tailor to District Needs
- Reference Contact Information Provided in RFQ Response
- Transmitted Via Fax and Follow Up by Telephone
- Graded Questions: Strongly Disagree to Strongly Agree
- Comments

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## ARCHITECTURAL FIRM REFERENCE QUESTIONNAIRE

DATE: \_\_\_\_\_

TO: COMPANY \_\_\_\_\_

CONTACT \_\_\_\_\_

FAX NUMBER \_\_\_\_\_

(Insert name) ISD has recently accepted qualification statements from architectural firms for:

(Insert name of project(s)) \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

The following firm has used your company/organization as a reference: (Insert firm name)

The following questions are part of \_\_\_\_\_ ISD's selection criteria and will help us evaluate this architectural firm's qualifications for our project(s). We would greatly appreciate your response to the following questions regarding their performance on a project or projects you are familiar with. Please review each question and circle the appropriate answer.

1 This firm is knowledgeable and well qualified in the area of K-12 educational facilities and in the type of work being considered for this project.

Strongly disagree	Disagree				Agree				Strongly agree	N/A
1	2	3	4	5	6	7	8	9	10	

2 This firm maintained the project(s) schedule during the design services phase (preliminary design, design development, and construction documents).

1	2	3	4	5	6	7	8	9	10	n/a
---	---	---	---	---	---	---	---	---	----	-----

3 This firm showed leadership and the desire to work as a team during the construction document phase of the project(s).

1	2	3	4	5	6	7	8	9	10	n/a
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# Ranking & Scoring of Qualifications

- Ranking & Scoring Not Required by Law
- Recommend the Use of an Objective Process

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# Ranking & Scoring of Qualifications

## Form 1 – RFQ Response Scoring Sheet

Used by Committee Members to Score RFQ Responses

Evaluation Criteria Scoring Can Be Weighted

Basis of Short List

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Evaluator Name: <b>John Smith</b>							
				<b>Criteria Weighting</b> <i>(If all evaluation criteria are of equal weight, leave "1" in this column. Increase this numerical value for evaluation criteria which are of higher importance.)</i>			
	<b>Evaluation Criteria</b>	<b>Score</b>		<b>Weighting</b>		<b>Weighted Score</b>	
1	TAB 1 - Firm Information	0	x	1	=	0	
2	TAB 2 - Firm's Management Style & Philosophy	0	x	1	=	0	
3	TAB 4 - Project Team	0	x	1	=	0	
4	TAB 5 - Forms	0	x	1	=	0	
5	TAB 6 - Supplemental Information	0	x	1	=	0	
6	<b>TOTAL WEIGHTED SCORE</b> <i>(Sum of Weighted Scores Lines 1 Through 5)</i>						<b>0</b>

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# Ranking & Scoring of Qualifications

❑ Form 2 – Tabulation of Reference Questionnaire Response

Evaluation Criteria Can Be Weighted

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		<b>Criteria Weighting</b> <i>(If all evaluation criteria are of equal weight, leave "1" in this column. Increase this numerical value for evaluation criteria which are of higher importance.)</i>	<b>Reference Name</b>	<b>Reference Name</b>	<b>No. of Reference Scores</b> <i>(Enter the number of reference scores received for each evaluation criteria)</i>	<b>Average Weighted Score</b> <i>(Sum of Criteria Scoring Multiplied By Criteria Weighting; Divided by Number of Reference Scores)</i>
<b>No.</b>	<b>Evaluation Criteria</b>					
1	This firm is well knowledgeable and well qualified in the area of K-12 educational facilities and in the type of work being considered for this project.	1			2	0
2	This firm maintained the project(s) schedule during the design services phase (preliminary design, design development, and construction documents).	1			2	0

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# Ranking & Scoring of Qualifications

☐ Form 3A – Evaluation Scoring Tabulation

Reference Scoring Can be Weighted

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		<b>Reference Weighting</b> <i>(If reference scoring is of equal weight to scoring by each evaluation team member, leave "1" in this column. Increase this numerical value if reference scoring is of higher weight.)</i>		<b>References Score</b> <i>(Form 2 Line 22)</i>		<b>Total Weighted Score</b>	
1	Average Score from Reference Questionnaires	1	x	0	=	0	
<b>Evaluators</b>							
2	Evaluator Name 1	<i>Enter Evaluator's Score from Form 1, Line 6</i>					0
3	Evaluator Name 2	<i>Enter Evaluator's Score from Form 1, Line 6</i>					0
4	Evaluator Name 3	<i>Enter Evaluator's Score from Form 1, Line 6</i>					0
5	Enter Number of Evaluators + 1 (References Score)						4
6	<b>TOTAL AVERAGED EVALUATION SCORE</b>						<b>0</b>

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# Ranking & Scoring of Qualifications

- Form 3B – Interview Scoring

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		Name	Name	Name	Name	<b>No. of Evaluators</b> <i>(Enter the number of evaluation scores received for each evaluation criteria)</i>	<b>Average Score</b> <i>(Sum of Evaluation Scores Divided by Number of Evaluators)</i>
<b>No.</b>	<b>Evaluation Criteria</b>	<b>Evaluation Scoring</b> <i>10 (Excellent) 5 (Average) 1 (Poor)</i>					
1	How well did the Architect and their team interact with each other and the selection committee?					4	0
2	Were the Architect's key personnel present and engaged in the presentation?					4	0
3	Was the presentation clear, concise, and "on subject"?					4	0
4	Were technical issues understandable?					4	0
5	Were the selection committee's questions answered?					4	0
6	Would this team present well to the school board and parent organizations?					4	0
7	Was the information in the presentation consistent with the information included in the Architect's RFQ response?					4	0
8	<b>TOTAL AVERAGE SCORE</b> <i>(Sum of Last Column, Lines 1 Through 6)</i>						0

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# Ranking & Scoring of Qualifications

Form 4 – Final Tabulation

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<b>Architectural Firms</b>	<b>Interview Score</b> <i>(Form 3B Line 8)</i>		<b>Interview Weighting</b> <i>(If the Interview Score is of equal weight to the Evaluation Score, leave "1" in this column. Change this numerical value if the Interview Score is of higher or lower weight.)</i>		<b>Weighted Interview Score</b>		<b>Evaluation Score</b> <i>(Form 3A Line 10)</i>		<b>Total Score</b> <i>(Weighted Interview Score + Evaluation Score)</i>
ABC Architects	0	x	1	=	0	+	0	=	0
DEF Architects	0	x	1	=	0	+	0	=	0
GHI Architects	0	x	1	=	0	+	0	=	0
JKL Architects	0	x	1	=	0	+	0	=	0
MNO Architects	0	x	1	=	0	+	0	=	0
PQR Architects	0	x	1	=	0	+	0	=	0

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# Short Listing for Formal Interviews

- Why Interview?
- Why Short List? How Many?
- Compatibility / Chemistry
- Representation
- Key Personnel
- Project Knowledge

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# Interview Process and Requirements

- Plan / Prepare / Schedule
- Identify Facilitator
- Interview Participants
- Agenda / Presentation Schedule
- Conducting the Interview
- Evaluation and Scoring

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# Final Selection Process and Approvals

- Ranking of Firms
- Further Interviews Needed?
- Documentation
- Preparation of Recommendation
- Selection and Authorization to Negotiate

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# Fee Negotiations & Structure

Confirm Bond Fee Budgets

Project Scope

Scope of Services

Included (Basic) Services

Changes in Services (Additional Services)

Reimbursable Expenses

Schedule

Communicate / Negotiate

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# Forms of Agreement Between Owner and Architect

- Resources
- Scope, Services, Fees, Schedule, Deliverables
- Chain of Responsibility
- Terms and Conditions
- Allocation of Risk
- Litigation Mitigation
- Path to a Successful Project

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# Debriefing of Architects

- No Legal Requirement to Release Unsolicited Information
- Establish What Information will be Released
- At Minimum, Recommend Notification of Decision Made
- Consider Debriefing Short Listed Firms

Prime Opportunity for Candid Feedback  
Feedback Can Be Used to Improve Future Selections Reduce  
Misconceptions About the Process

- Debriefing Effectiveness Diminishes With Time  
Within Six Weeks After a Selection is Made

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# Closing Remarks

Written Comments / Feedback is Appreciated

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# Contact Us

**Roy Sprague**

**Assistant Superintendent of Facilities & Construction**

**Cypress-Fairbanks Independent School District**

**281 – 897 - 4057**

**[Roy.sprague@cfisd.net](mailto:Roy.sprague@cfisd.net)**

**Scott Layne**

**Assistant Superintendent for Support Services**

**Irving Independent School District**

**972 – 600 – 5400**

**[slayne@irvingisd.net](mailto:slayne@irvingisd.net)**

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