QUALIFICATION BASED SELECTION: BEST PRACTICES FROM A SCHOOL DISTRICT’S PERSPECTIVE

HEATHER STEER, SACRAMENTO
JANET DIXON, ONTARIO
Why is qualification based selection so important?

- Getting the best firm for the task at hand
- Maintaining transparency within the District and to your Board of Trustees
- Your funding could depend on it.....
OPSC AUDITS REQUIRE COMPLIANCE WITH PUBLIC CONTRACT CODE.

YES – YOU WILL HAVE TO SHOW THEM PROOF
Every Service Every Time:
- Architects
  - Could have District “pool”
- Construction Management
- Environmental Specialists
- Site Acquisition
- Inspector of Record
- Contractors
  - (Alternative Delivery)
- Lab/Soils/Construction Testing
- Close Out Specialists
IF YOU ADVERTISE, THEY WILL COME..

At least two runs in a local publication

Minimum of one trade journal

Don’t forget your professional associations!!
Request for Qualifications should reflect what the District truly needs

- Specific Projects
- Specific Minimum Qualifications
- If you want someone you’ve worked with before – make that an evaluation point!
- Require staff that you will work with in interviews!
- Consolidate your efforts if you are doing multiple projects – it saves everyone money!

- Doing the “process”, just for the sake of “process”

“I like money, I have a little. I keep it in a jar on top of my refrigerator”
-Wedding Singer
Assemble a team of employees to review the submissions
Create a rating matrix for each person to follow
Schedule interviews for your top candidates

BE PREPARED TO GIVE FEEDBACK TO ALL PERSONS NOT SELECTED.
## Lease Leaseback Contractor Request for Qualifications

**Reviewed By:** ____________________________  **Date:** ____________________________

<table>
<thead>
<tr>
<th></th>
<th>Conformance to RFQ format</th>
<th>Organization, presentation, content of submittal</th>
<th>Experience and competence of Firm</th>
<th>Methods and overall strategic plan</th>
<th>Knowledge and understanding of local environment</th>
<th>Financial resources and stability</th>
<th>Insurance requirements</th>
<th>Overall Impression Scale 1-10 (10 High)</th>
<th>Comments</th>
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SUGGESTIONS FOR INTERVIEWEES BEFORE THE INTERVIEW

- Research

- Practice questions

- Have the right people at the interview
  - ONLY the people that will work directly with the District

- Relevant and Current References
  - Do they know the team you are proposing?
  - Do they know your work on similar projects?
SUGGESTIONS FOR INTERVIEWEES AT THE INTERVIEW

- Answer the questions asked, not what you think we need to hear

- Provide relevant examples

- Communication skills
  - Maintain professional demeanor

- Leave-behinds
  - Copy of presentation either in hard copy or on drive
  - Keep the binder collection behind!
Keep all records with the project file
QUESTIONS?
RIDDLES?

You can always call or email either of us, anytime – we don’t judge.
CONTACTS

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