

Office of the Mayor
Tulsa, Oklahoma

Executive Order No. 90-05
May 8, 1990

ESTABLISHMENT OF AN
ADMINISTRATIVE PROCEDURE FOR SELECTION OF ARCHITECTURAL
AND ENGINEERING SERVICES
FOR THE CITY OF TULSA

By virtue of the power vested in me as Mayor of the City of Tulsa, it is hereby ordered:

Section 1. PURPOSE. To establish an open and fair process for entering into contracts for registered professional architectural, landscape architectural, engineering and surveying services.

Section 2. ORGANIZATIONS AFFECTED. All City Departments, Trusts and Authorities.

Section 3. DEFINITIONS. As used in this regulation "professional services" shall mean services requiring any individual, firm, corporation, association, partnership, copartnership, or any other legal entity possessing the required qualifications to provide licensed architectural, landscape architectural, registered engineering and/or registered land surveying services.

Section 4. POLICY.

- 4.1 The City requires that the Legal Department approve, as to form, all contracts.
- 4.2 All contracts shall be approved by the Mayor.
- 4.3 Each department shall use a selection committee responsible for proposal solicitation and evaluation and recommendation of qualified professionals.

Section 5. PROCEDURES.

5.1 Selection Process

- 5.1.1 The Director of Public Works shall appoint a standing selection committee consisting of at least three but no more than five individuals from within and/or outside the department, at least three of whom shall be engineers, architects, landscape architects and/or surveyors. Appointments to the selection committee shall be filed with the City Clerk.

- 5.1.2 All other departments of the City shall appoint a selection committee before proposals for professional services are solicited.
- 5.1.3 A statement of need for professional services shall be prepared by the department before proposals are solicited.
- 5.1.4 A statement of the scope of the work to be performed will be prepared.
- 5.1.5 A file of qualified professional service firms/ individuals shall be maintained by each: department utilizing these types of services.
- 5.1.6 For services estimated to cost under \$50,000 the selection committee shall meet, evaluate the firms in the file and recommend a professional for the project. For specialized services it may be necessary to evaluate firms not included in the file.
- 5.1.7 For services estimated to cost more than \$50,000 the selection committee shall meet, prepare a list of firms from the file and/or other sources and solicit a written statement of interest, qualifications and/or proposals. The committee shall review submitted proposals and decide whether selection can be based upon the proposals. If necessary, a more detailed proposal may be requested or interviews conducted with the top three to five firms before a recommendation is made. For specialized services it may be necessary to solicit proposals from firms not included in the file.
- 5.1.7.1 Some projects will be developed in phases. Certain professional service firms may be qualified for several or all phases. In such cases the estimated scope and cost of all phases may determine the selection process rather than just the first phase or contract. If it is then desired to pursue subsequent phases with the same professional service firm the selection process need not be repeated.
- 5.1.8 The selection committee will negotiate the fee.
- 5.1.9 A letter of exception shall be prepared for approval by the Mayor in any instance where the procedures outlined in this document cannot be followed.

5.2 Written Contract

There will be a written contract for professional services which specifies a definite duration and a maximum compensation.

5.3 Project Monitoring and Documentation

5.3.1 Each contract shall be assigned to a particular individual for oversight and monitoring.

5.3.2 A contract file for each professional service shall be maintained by the department.

5.4 Accounting and Reporting

5.4.1 Funds for professional services shall be budgeted and encumbered for each contract.

5.4.2 Each contract shall be reviewed to assure that there is a continuing need for the service, that terms are being complied with and that the work is progressing satisfactorily.

5.4.3 A performance review will be prepared at the end of each professional service contract.

5.5 Guidelines

All departments shall utilize the guidelines which follow for implementation of this document in interpreting and carrying out the procedures outlined.

Section 6. EFFECTIVE DATE. This Order shall take effect immediately.



Rodger A. Randle

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M A Y O R

ATTEST:

Ronald Payne

City Clerk

**GUIDELINES FOR IMPLEMENTATION
OF ADMINISTRATIVE PROCEDURE FOR
ARCHITECTURAL AND ENGINEERING SERVICES CONTRACTS**

Section 1. ASSESSMENT OF NEED. Departments should clearly assess and determine the need for the utilization of architectural, landscape architectural, surveying and engineering services. "Professional services" shall mean services requiring any individual, firm, corporation, association, partnership, copartnership, or any other legal entity possessing the required qualifications to provide licensed architectural, landscape architectural, registered engineering and/or registered land surveying services. Professional engineering services are generally used to obtain the following:

- expertise of a specialized nature which is not available within the department or from another department;
- outside expertise to provide a new or broader perspective on a specific project;
- the skill of experts whose established prestige can contribute to important projects;
- performance of one-time projects of limited duration that do not warrant additional permanent staff.

Professional services should not be used to:

- make policy or managerial decisions that are the direct responsibility of department management;
- circumvent personnel ceilings, pay limitations or competitive employment procedures;
- supervise permanent employees, except as necessary to complete a short-term project;
- perform routine, long-term tasks that are normally the responsibility of permanent employees.

Section 2. SELECTION PROCESS. The Director of Public Works should appoint a standing committee for the selection of professional services.

Managers of all other departments should appoint a selection committee before entering into any contract for professional services.

The selection committee should consist of at least three but no more than five individuals from within and/or outside the department, whose positions would make them familiar with the type of projects to be evaluated. At least three of the individuals shall be engineers, architects, landscape architects and/or surveyors. The department director may appoint additional temporary members to the committee if their skills or