


**SUBJECT: RETAINING ARCHITECTS, PROFESSIONAL ENGINEERS,
DESIGNERS, AND LAND SURVEYORS FOR CONSULTANT SERVICE**

Purpose: Section 3.61 of the Madison General Ordinances entitled “Consultant Services” specifies general guidelines for Departments and Divisions seeking the services of a consultant. This Administrative Procedure is to establish more specific guidelines in the retaining of Architects, Professional Engineers, Designers, and Land Surveyors for City projects.

Procedure:

1. Unless the anticipated cost of consulting services is less than \$1,000, prior to any Division, Department, Board or Commission interviewing, advertising for, or contracting with consultants for services, a resolution shall be prepared for review by the Common Council, authorizing the Division, Department, Board or Commission to proceed with the acquisition of consultant services. Said resolution shall contain a fiscal note listing the source of funds for financing the acquisition of said services.
2. The following guidelines shall be observed by the Recommending Agency in the selection of the consultant:
 - a. To afford as many interested consultants as practical an opportunity to qualify, (1) a notice shall be published in the official newspaper and may include other appropriate publications, stating that the City is considering engaging a consultant for a specific project, (2) appropriate directories should be reviewed, and invitations issued to consultants with special expertise in the area of concern.
 - b. The Recommending Agency shall maintain a list of consultants who were mailed copies of the notice for the project and said listing shall become a part of the file.
 - c. The Recommending Agency shall include in the notice to the consultants:
 - i. Complete name and address of Recommending Agency.
 - ii. A clear and complete description of the project or task.
 - iii. A statement of the desired objectives.
 - iv. The scope of the consultant’s task.
 - v. Policy and project restraints.
 - vi. The time schedule for award of contract, commencement of work, submission of project reports and project completion.
 - vii. Time of interview if interviews are considered necessary.
 - d. A consultant interested in an engagement should disclose complete information regarding qualifications. In addition to the specific data requested, previous job photographs and general background data may be included.
3. The interested consultant shall provide the following information when responding to a notice:
 - a. A description of qualifications, experience, organization and resources.

- b. A brief list of similar types of work previously completed, with the name and address of the client for whom the work was done.
 - c. A description of the techniques he intends to use in approaching the City's project.
 - d. A list of the staff consultants who would be committed to the project, with their professional resumes.
 - e. A description of subcontractors, if any are contemplated, indicating what portion of the work is to be done by them.
4. The Recommending Agency should be familiar with the project, know what is required from the consultant, and proceed as follows:
- a. Prepare a standard list of questions which shall be asked of all potential consultants. At the conclusion of the interview, these questions shall be a part of the file on the selection of the consultant.
 - b. At the first interview of the consultants, consider the qualifications of all the consultants submitting data; select the three best qualified and rate 1st, 2nd and 3rd best qualified.
 - c. The consultant considered best qualified and rated 1st shall be invited for an additional interview to discuss details of the project, and negotiate the question of compensation and other contract terms. The invitation for the interview shall include a request for a detailed cost analysis of the project and a statement concerning the financial standing and bank affiliation of the consultant. After the Recommending Agency has been assured that all conditions are satisfied, it shall submit its recommendation to the Common Council for approval. Otherwise, if not satisfied, the Recommending Agency shall invite the 2nd best qualified and repeat this process. Process shall be repeated for 3rd best qualified if others fail to meet the conditions.


Paul R. Soglin
Mayor

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