



Pennsylvania
Department of General Services

05/18/2026

Professional Selections & Design Professional Evaluations Revamp



Before We Begin

Recording Disclaimer

This session is being recorded for training and record-keeping purposes. By participating in this session, you are consenting to the recording, retention and use of this session. At any time if you have a question or comment, feel free to place that in the Q&A, and we will respond to you as soon as possible. If you would like to ask your question or to comment verbally – please note that by doing so, you are consenting to the recording, retention and use of your statements recorded as part of this session.

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Questions

During the presentation, all participant microphones will be disabled. Please submit any questions through the Q&A feature, which will be addressed by our moderator.

After the presentation concludes, if you have a question, you may use the Raise Hand feature, which will allow us to take you off mute. Although this portion of the presentation is still being recorded, it will not be posted to our website. You may also continue to use the Q&A feature during this time.

Agenda

Introductions

Notice of Recording

Presenters

Professional Selections

Professional Evaluations

Questions

Professional Selections

What's Changed?

SCORING

Point Distribution Minimums/Maximums

Equitable Distribution/Professional Evaluations Data Base

Requirements for Location of Office Performing the Majority of the Work

APPLICATION

GUIDE INSTRUCTIONS



SCORING/APPLICATION

POINT DISTRIBUTION CHANGES

50 POINT MINIMUM
EQUITABLE DISTRIBUTION OF
CONTRACTS
&
GEOGRAPHIC PROXIMITY

100 POINT MAXIMUM
PROFESSIONAL EVALUATIONS

REMINDER

FIVE CATEGORIES DICTATED BY THE PROCUREMENT CODE

EQUITABLE DISTRIBUTION OF CONTRACTS
PARTICULAR CAPABILITIES
GEOGRAPHIC PROXIMITY
NECESSARY PERSONNEL
OTHER – PROFESSIONAL EVALUATIONS

1000 TOTAL POINTS

LOCATION OF THE OFFICE PERFORMING THE
MAJORITY OF THE WORK

THE FIRM APPLYING MUST BE ABLE TO PROVE OWNERSHIP OR
HAVE A LEASE AT THE TIME OF APPLICATION.



SCORING/APPLICATION

DATABASE

EQUITABLE DISTRIBUTION OF
CONTRACTS
&
PROFESSIONAL EVALUATIONS

FIRM'S **FEDERAL TAX EIN**

APPLICATION HAS BEEN REVISED CHANGES INCLUDE:

A SPACE TO RECORD THE FIRM'S EIN
SPACE FOR SEVEN CONSULTANTS
SPACE TO IDENTIFY 9 KEY PERSONNEL
SPACE TO LIST DGS PROJECTS ELIMINATED
WILL RELY ON INTERNAL EIN DATA
ONE FULL PAGE EACH TO DESCRIBE 3 SIMILAR
PROJECTS AND SERVICES
ONE PAGE FOR ADDITIONAL INFORMATION

DGS RESERVES THE RIGHT TO REJECT
PREVIOUS VERSIONS OF THE APPLICATION
USE THE LATEST APPLICATION DATED **APRIL 2026**



SCORING/APPLICATION

INSTRUCTION CLARIFICATIONS

**CONSULTANTS LISTED IN THE
APPLICATION MUST BE USED TO
COMPLETE THE PROJECT**

**INDIVIDUALS LISTED TO LEAD THE
TEAM MAY NOT BE SUBSTITUTED**

**FEES PROVIDED FOR NON-DGS
COMMONWEALTH PROJECTS SHALL
BE TOTAL FEE NOT JUST THE
APPLICANT'S FEE**

REMINDERS

**NO ALTERATIONS OR ADDITIONS TO THE
APPLICATION ARE PERMITTED
APPLICATION MUST BE SUBMITTED
ELECTRONICALLY IN TRIMBLE
DESIGN FIRMS APPLYING AS JOINT
VENTURES MUST BE LEGALLY BOUND
WHEN REQUESTED, COMPLETE SDB/VBE
PACKETS MUST BE UPLOADED BY THE
APPLICATION DUE DATE**

**QUESTIONS? CONTACT: PROFESSIONS SELECTION
ADMINISTRATOR**

**CHANGES GO INTO EFFECT FOR THE FIRST
GOVERNOR'S COMMITTEE MEET IN FY 26-27**

**NEW DOCUMENTS WILL BE AVAILABLE TO DOWNLOAD FROM
THE TRIMBLE BIDDING MODULE.**



New Professional Evaluations Program

What's Changed?

From

- 6 evaluations
- Evaluate Compliance
- Limited differentiation between firms
- No stakeholder input and feedback loop
- Manual Score Calculation
- Manual Evaluation Form Initiation
- 200 Pts for Past Performance

To

- 4 evaluations
- Evaluate Compliance *and* Effectiveness
- Meaningful differentiation based on actual performance and documentation
- Stakeholder Input and Feedback Loops
- Automated Score Calculation
- Automate Evaluation Form Initiation, step due dates
- 100 Points for Past Performance



When Evaluations Occur

- Post DD Approval Evaluation (25%)
- Post Bid Opening Evaluation (35%)
- 50% Physical Construction Evaluation (20%)
- Post Total Project Punchlist Complete (20%)

**Evaluations are weighted based on how the project performance impacts the Commonwealth and project success.
Evaluations are automatically initiated in Trimble.**



Evaluation Categories

- **Quality of Work (30%)** – Control quality and create deliverables that meet quality standards.
- **Cost Management (30%)** – Monitor, estimate and control project costs.
- **Schedule Management (25%)** – Manage project activities to deliver the project on schedule.
- **Stakeholder Engagement & Communications (15%)** – Engage with the project stakeholders, effectively communicate, and resolve issues.

Each category is weighted using the percentages above.



How Scoring Works

Rating	Definition	Justification/Notes
<p>Exceptional (5 Points)</p>	<p>Performance meets contractual requirements and exceeds to the Commonwealth's benefit.</p> <p>The contractual performance was accomplished with few minor issues where corrective actions were highly effective.</p>	<p>Identify <u>significant events/strengths</u> and state how they were of benefit to the Commonwealth.</p> <p>No significant weaknesses identified.</p>
<p>Satisfactory (3 Points)</p>	<p>Performance meets contractual requirements.</p> <p>The contractual performance contains some minor issues for which corrective actions were satisfactory</p>	<p>Minor and/or major problems that Design Professional recovered from <u>without impact to the project</u> schedule or budget are permitted.</p> <p>There should have been no significant weaknesses identified.</p>
<p>Unsatisfactory (1 Points)</p>	<p>Performance does not meet most contractual requirements, and recovery is not likely in a timely manner.</p> <p>The contractual performance contains serious issue(s) for which the Design Professional 's corrective actions appear to be or were ineffective</p>	<p>Identify events/weaknesses that the Design Professional had trouble overcoming and state how it impacted the Commonwealth.</p> <p>*Unsatisfactory ratings must be accompanied by supporting documentation for the performance issue/weakness including documentation of notifying the Design Professional of the performance issue.</p>

Each category includes a list of criteria that the Design Professional will be evaluated on by the DGS Evaluator. Evaluation Criteria are based on Agreement requirements, Department standards, and project delivery expectations.



Evaluation Criteria

Design

Development

Post DD Evaluation

Category	Criteria
Schedule Management – Manage project activities to deliver the project on schedule.	<ul style="list-style-type: none"> <input type="checkbox"/> Timeliness in providing acceptable design submissions <input type="checkbox"/> Ability to plan and schedule activities to keep the project on schedule. <input type="checkbox"/> Recovery schedules are effective if the project is delayed. <input type="checkbox"/> Maintaining an accurate and updated project working schedule and attaching it to meeting minutes <input type="checkbox"/> Permit submissions, reviews and approvals are on time as to not delay project bidding <input type="checkbox"/> Coordination with Utilities to develop scope narrative, estimated costs, and routing plan as to not delay utility agreements being executed prior to bidding.
Quality Management – Control quality and create deliverables that meet quality standards	<ul style="list-style-type: none"> <input type="checkbox"/> Design supports Project Values <input type="checkbox"/> Deliverables meet the Department’s acceptance criteria <input type="checkbox"/> Compliance with Client Agency Requirements and Design Criteria <input type="checkbox"/> Ability to address design review comments <input type="checkbox"/> Drawings and Specifications are coordinated <input type="checkbox"/> Coordination between design disciplines and prime contractors <input type="checkbox"/> Design alternatives are presented with relevant information. <input type="checkbox"/> Technical adequacy of design <input type="checkbox"/> Deliverables are provided and uploaded into Trimble using file naming convention from Document Management Policy
Stakeholder Engagement & Communications	<ul style="list-style-type: none"> <input type="checkbox"/> Communication is clear and timely <input type="checkbox"/> Considerate and responsive to feedback and concerns <input type="checkbox"/> Ability to support the Department and Client Agency to make effective decisions <input type="checkbox"/> Meeting Minutes are provided on time, using the Department’s template and effectively document meeting discussions.
Cost Management – Monitoring, estimating and controlling project costs	<ul style="list-style-type: none"> <input type="checkbox"/> Cost monitoring system, corrective actions and value engineering efforts are effective to bring costs within budget <input type="checkbox"/> Design alternatives are presented with appropriate cost information including first costs and life cycle costs <input type="checkbox"/> Risk Register is maintained, and cost impacts are provided <input type="checkbox"/> Cost Estimates are prepared in accordance with Department’s Cost Estimating Standards <input type="checkbox"/> Invoices are submitted with required supporting documentation



Evaluation Criteria

Bid Award

Post Bid Award

Category	Criteria
Schedule Management – Manage project activities to deliver the project on schedule.	<ul style="list-style-type: none"> <input type="checkbox"/> Timeliness in providing acceptable design submissions <input type="checkbox"/> Ability to plan and schedule activities to keep the project on schedule. <input type="checkbox"/> Recovery schedules are effective if the project is delayed. <input type="checkbox"/> Maintaining an accurate and updated project working schedule and attaching it to meeting minutes <input type="checkbox"/> Permit submissions, reviews and approvals are on time as to not delay project bidding <input type="checkbox"/> Coordination with Utilities to develop scope narrative, estimated costs, and routing plan as to not delay utility agreements being executed prior to bidding. <input type="checkbox"/> Timeliness in responding to bidder RFIs and issuing addenda <input type="checkbox"/> Timeliness and punctuality at the pre-bid meeting <input type="checkbox"/> Continuing to update the working schedule during procurement phase. <input type="checkbox"/> Bid extensions caused by Design Professional's negligence
Quality Management – Control quality and create deliverables that meet quality standards	<ul style="list-style-type: none"> <input type="checkbox"/> Design supports Project Values <input type="checkbox"/> Deliverables meet the Department's acceptance criteria <input type="checkbox"/> Compliance with Client Agency Requirements and Design Criteria <input type="checkbox"/> Ability to address design review comments <input type="checkbox"/> Drawings and Specifications are coordinated <input type="checkbox"/> Coordination between design disciplines and prime contractors <input type="checkbox"/> Design alternatives are presented with relevant information. <input type="checkbox"/> Technical adequacy of design <input type="checkbox"/> Deliverables are provided and uploaded into Trimble using file naming convention from Document Management Policy <input type="checkbox"/> Addenda did not address design errors, omissions or poor coordination that resulted in the issuance of new drawings, redesign or major modifications to the bidding documents
Stakeholder Engagement & Communications	<ul style="list-style-type: none"> <input type="checkbox"/> Communication is clear and timely <input type="checkbox"/> Considerate and responsive to feedback and concerns <input type="checkbox"/> Ability to support the Department and Client Agency to make effective decisions <input type="checkbox"/> Meeting Minutes are provided on time, using the Department's template and effectively document meeting discussions. <input type="checkbox"/> Prepared for the Pre-Bid or Proposal Meeting. Effectively presented applicable topics from the DGS Pre-Bid Conference Agenda template.
Cost Management – Monitoring, estimating and controlling project costs	<ul style="list-style-type: none"> <input type="checkbox"/> Cost monitoring system, corrective actions and value engineering efforts are effective to bring costs within budget <input type="checkbox"/> Design alternatives are presented with appropriate cost information including first costs and life cycle costs <input type="checkbox"/> Risk Register is maintained, and cost impacts are provided <input type="checkbox"/> Cost Estimates are prepared in accordance with Department's Cost Estimating Standards <input type="checkbox"/> Invoices are submitted with required supporting documentation <input type="checkbox"/> Lowest responsive Base Bid 1 is within (+/-) 10% of the Base Bid 1 cost estimate provided with the Construction Documents submission. <input type="checkbox"/> Lowest responsive Base Bid 1 was lower than the Base Construction Allocation. <input type="checkbox"/> Project Award Value is less than Base Construction Amount (BCA).



Evaluation Criteria

50% Physical Construction Complete

50% Physical Construction Completion

Evaluation Factor	Criteria
<p>Schedule Management – duties were executed in a timely manner and so as not to delay the construction schedule.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Responds to submittals (14 days), RFIs (7 days) <input type="checkbox"/> Timeliness in evaluating and recommending change orders, including detailed cost breakdown and analysis. <input type="checkbox"/> Provides site meeting progress reports (3 days after meeting) <input type="checkbox"/> Responsive to the Department’s requests for special meetings and site observations. <input type="checkbox"/> Timeliness in responding to Contractors’ schedule of values and schedules <input type="checkbox"/> Routine confirmation that all prime contractors have been regularly updating their as-built drawings
<p>Quality Management – accuracy of construction documents and effective compliance monitoring, interpretation, and problem solving.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Reviews progress of work and identifies and addresses contractor non-compliance with written recommendations <input type="checkbox"/> Minimal conflicts in plans and specifications that impact the work between the prime contractors. <input type="checkbox"/> Error and Omission change orders are below 2.5% of the project value. <input type="checkbox"/> Interprets the Contract Documents through effective RFI responses. <input type="checkbox"/> Effectively evaluates contractor submittals, shop drawings and material compliance with specifications. <input type="checkbox"/> Clarity and reliability of reports and other records in support project decisions.
<p>Stakeholder Engagement & Communications - effective stakeholder communication and conflict resolution.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Participate and contribute during job conferences and meetings <input type="checkbox"/> Effectiveness in resolving disputes relating to contractor claims or work quality
<p>Cost Management – effective cost control and accurate cost estimating in support of Department’s administration of construction contract.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Error and Omission change orders are below 2.5% of the project value. <input type="checkbox"/> Magnitude (\$ value) of Unforeseen change orders are typical for project type. <input type="checkbox"/> Provides scope, drawings, sketches, specifications, etc. to accommodate contractor CCO proposals. <input type="checkbox"/> Effective cost evaluations and negotiation of contractor breakdown sheets and change order pricing.



Evaluation Criteria

Total Punchlist Complete


Post Punchlist Completion Evaluation

Evaluation Categories	Sub Factor
<p>Schedule Management – duties were executed in a timely manner and so as not to delay the construction schedule and completion of punch list.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Responds to submittals (14 days), RFIs (7 days) <input type="checkbox"/> Timeliness in evaluating and recommending change orders, including detailed cost breakdown and analysis. <input type="checkbox"/> Provides site meeting progress reports (3 days after meeting) <input type="checkbox"/> Responsive to the Department’s requests for special meetings and site observations. <input type="checkbox"/> Timeliness in reviewing revised contractor schedules <input type="checkbox"/> Routine confirmation that all prime contractors are regularly updating their as-built drawings <input type="checkbox"/> Final Inspection(s) occur within 10 days of determination of substantial completion. <input type="checkbox"/> Punch list was delivered to the contractor at the final inspection or soon after (within a week). <input type="checkbox"/> Responsive to the Department’s request to visit the site to verify and accept completion of punch list items.
<p>Quality Management – accuracy of construction documents and effective compliance monitoring, interpretation, and problem solving.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Reviews progress of work and identifies and addresses contractor non-compliance with written recommendations <input type="checkbox"/> Minimal conflicts in plans and specifications that impact the work between the prime contractors. <input type="checkbox"/> Error and Omission change orders are below 2.5% of the project value. <input type="checkbox"/> Interprets the Contract Documents through effective RFI responses. <input type="checkbox"/> Effectively evaluates contractor submittals, shop drawings and material compliance with specifications. <input type="checkbox"/> Clarity and reliability of reports and other records in support project decisions. <input type="checkbox"/> Punch list is accurate, includes only contract items and includes a reasonable cost of completion.
<p>Stakeholder Engagement and Communication – effective stakeholder communication and conflict resolution.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Participate, contribute and effectively execute construction contract administration responsibilities during job conferences and meetings <input type="checkbox"/> Effectiveness in assisting with the Department to resolve contractor disputes
<p>Cost Management – effective cost control and accurate cost estimating in support of Department’s administration of construction contract.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Error and Omission change orders are below 2.5% of the project value. <input type="checkbox"/> Magnitude (\$ value) of Unforeseen change orders are typical for project type. <input type="checkbox"/> Provides scope, drawings, sketches, specifications, etc. to accommodate contractor CCO proposals. <input type="checkbox"/> Effective cost evaluations and negotiation of contractor breakdown sheets and change order pricing.



Key Documents

Performance Documentation



Click or tap to enter a date

Professional's Principal or Owner Name Email: Professional's email
 Firm's Name
 Professional's Street Address
 City, State Zip Code

RE: **NOTICE OF PERFORMANCE DEFICIENCY**
 Project No. DGS C-XXXX-XXXX Phase X
 Project Name

Mr./Ms. Professional:



This letter is to inform you that your performance on the subject project is not meeting the expectations of the Department as outlined in the Project Procedures Manual and/or is not in compliance with the Agreement for Professional Services executed on [Click or tap to enter a date](#). A description of the performance and noncompliance issues are as follows:

1. Describe the issue and reference the performance standard, terms from the Agreement for Professional Services and/or the Project Procedures Manual.
2. Describe the issue and reference the performance standard, terms from the Agreement for Professional Services and/or the Project Procedures Manual.
3. Describe the issue and reference the performance standard, terms from the Agreement for Professional Services and/or the Project Procedures Manual.

You are required to correct the performance issues within (10) calendar days of receipt of this letter. Please contact me as soon as possible and provide a written plan of action to remedy the performance issues. The plan of action must include specific actions, timelines and responsible parties required to correct the deficiency and move the project towards successful completion.

Failure to correct all performance issues within (10) calendar days will result in entering your firm into the Commonwealth's Contractor Responsibility Program (CRP), which will negatively affect your ability to contract with DGS and the Commonwealth of Pennsylvania in the future. Additionally, DGS reserves all rights and remedies under the Agreement and at law, which may include without limitation declaring Professional in default, and terminating the Agreement.

Trimble – Professional Evaluations User Guide



Design Professional Evaluation [PE]

User Guide

Process Owner: Name: | owner@pa.gov

Change Log			
Date	Process Step(s)	Description	Name

Evaluation Criteria

50% Physical Construction Completion Evaluation

Evaluation Factor	Criteria
Schedule Management – duties were executed in a timely manner and so as not to delay the construction schedule.	<input type="checkbox"/> Responds to submittals (14 days), RFIs (7 days) <input type="checkbox"/> Timeliness in evaluating and recommending change orders, including detailed cost breakdown and analysis. <input type="checkbox"/> Provides site meeting progress reports (3 days after meeting) <input type="checkbox"/> Responsive to the Department's requests for special meetings and site observations. <input type="checkbox"/> Timeliness in responding to Contractors' schedule of values and schedules <input type="checkbox"/> Routine confirmation that all prime contractors have been regularly updating their as-built drawings
Quality Management – accuracy of construction documents and effective compliance monitoring, interpretation, and problem solving.	<input type="checkbox"/> Reviews progress of work and identifies and addresses contractor non-compliance with written recommendations <input type="checkbox"/> Minimal conflicts in plans and specifications that impact the work between the prime contractors. <input type="checkbox"/> Error and Omission change orders are below 2.5% of the project value. <input type="checkbox"/> Interprets the Contract Documents through effective RFI responses. <input type="checkbox"/> Effectively evaluates contractor submittals, shop drawings and material compliance with specifications. <input type="checkbox"/> Clarity and reliability of reports and other records in support project decisions.
Stakeholder Engagement & Communications - effective stakeholder communication and conflict resolution.	<input type="checkbox"/> Participate and contribute during job conferences and meetings <input type="checkbox"/> Effectiveness in resolving disputes relating to contractor claims or work quality
Cost Management – effective cost control and accurate cost estimating in support of	<input type="checkbox"/> Error and Omission change orders are below 2.5% of the project value. <input type="checkbox"/> Magnitude (\$ value) of Unforeseen change orders are typical for project type. <input type="checkbox"/> Provides scope, drawings, sketches, specifications, etc. to accommodate



How Scoring Works

Evaluations

- DGS evaluates performance at DD, Post Bid, 50% Construction, Total Punch Complete.

Firm Performance Score (FPS)

- FPS is calculated by adding all evaluations divided by total points available.

Selections Score

- FPS is translated to 0-100 pts scale and added to selections scoring matrix.

Evaluations impact a Design Professional's score when applying for appointment for capital projects with DGS.



Example of an Evaluation Score (Post DD)

Evaluation Score

Category	Score	Cat Wt	Wt Score
Quality	3	0.3	0.9
Cost	1	0.3	0.3
Schedule	5	0.25	1.25
Stk Eng & Comm	1	0.15	0.15
		Raw Score	2.6
		Evaluation Wt	0.25
		DD Score	0.65

Evaluation Score (Max)

Category	Score (Max)	Cat Wt	Wt Score (Max)
Quality	5	0.3	1.5
Cost	5	0.3	1.5
Schedule	5	0.25	1.25
Stk Eng & Comm	5	0.15	0.75
		Raw Score	5
		Evaluation Wt	0.25
		DD Score (max)	1.25



Calculating Firm Performance Score

- After each evaluation score is weighted, they are added together to get the project performance score.

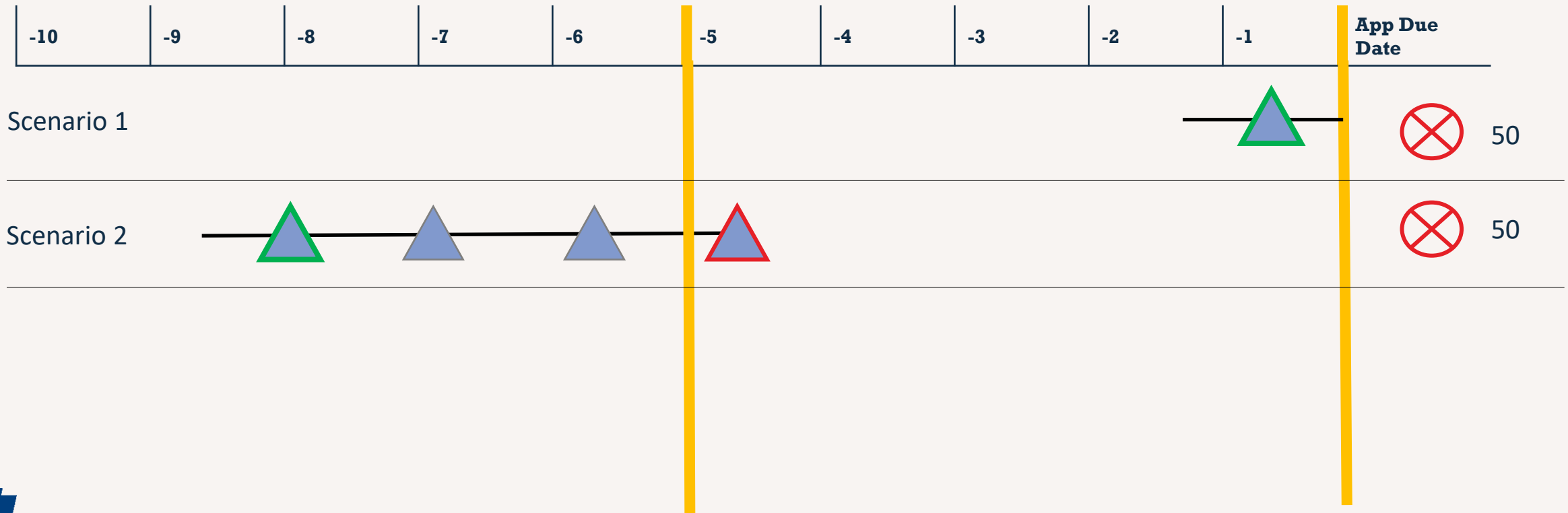
$$(FPS) = \frac{\sum (E_{SCORE})}{\sum (E_{SCORE MAX})} \times 100$$

The Firm Performance Score is a measure of the Design Professional's Performance for projects within the past 5 years. **A firm must have at least 2 evaluations.**



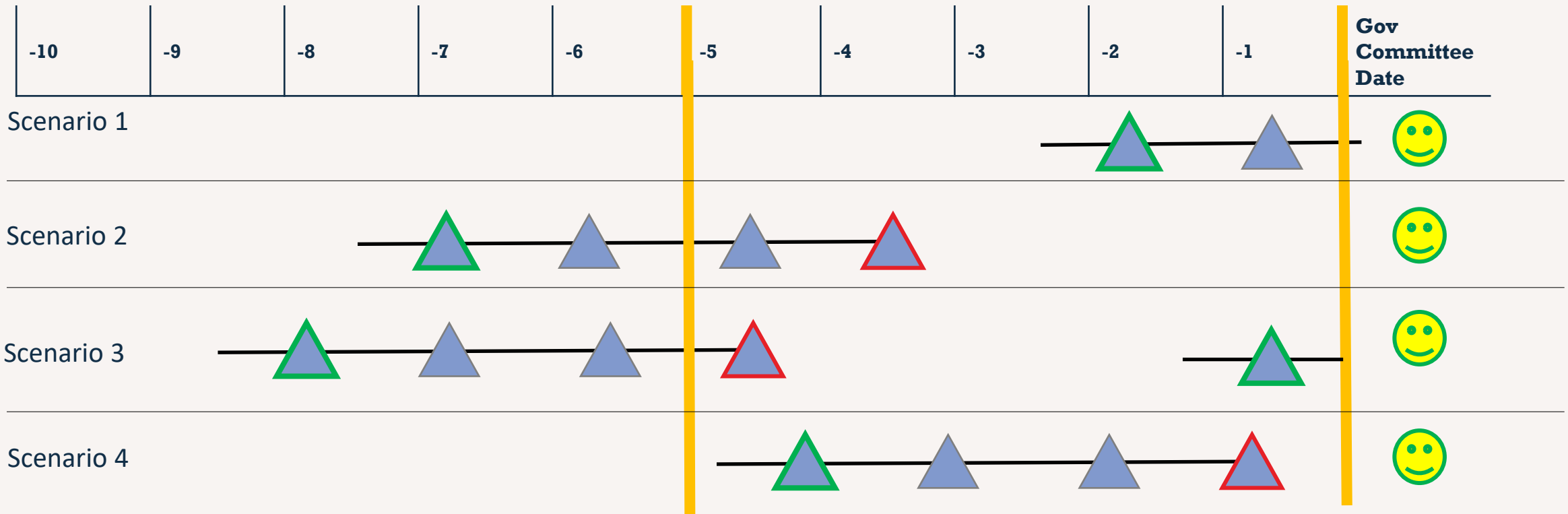
Calculating Firm Performance Score

- If only 1 evaluation, FPS = 60% (Sel Score of 50 pts)



Calculating Firm Performance Score

- If 2 or more evaluations, FPS is equal to all evaluations in 5-year period.



Calculating Selections Score

- Selection Score is calculated by translating the FPS % onto a scale from 0 – 100 point

FPS	Selections Score	FPS	Selections Score	FPS	Selections Score	FPS	Selections Score
20%	0	41%	26	61%	51	81%	76
21%	1	42%	28	62%	52	82%	77
22%	3	43%	29	63%	54	83%	79
23%	4	44%	30	64%	55	84%	80
24%	5	45%	31	65%	56	85%	81
25%	6	46%	33	66%	57	86%	82
26%	8	47%	34	67%	59	87%	84
27%	9	48%	35	68%	60	88%	85
28%	10	49%	36	69%	61	89%	86
29%	11	50%	37	70%	62	90%	87
30%	13	51%	39	71%	64	91%	89
31%	14	52%	40	72%	65	92%	90
32%	15	53%	41	73%	66	93%	91
33%	16	54%	42	74%	67	94%	92
34%	18	55%	44	75%	69	95%	94
35%	19	56%	45	76%	70	96%	95
36%	20	57%	46	77%	71	97%	96
37%	21	58%	47	78%	72	98%	97
38%	23	59%	49	79%	74	99%	99
39%	24	60%	50	80%	75	100%	100
40%	25						

FPS 20 % → Sel Score 0 pts. → All 1's

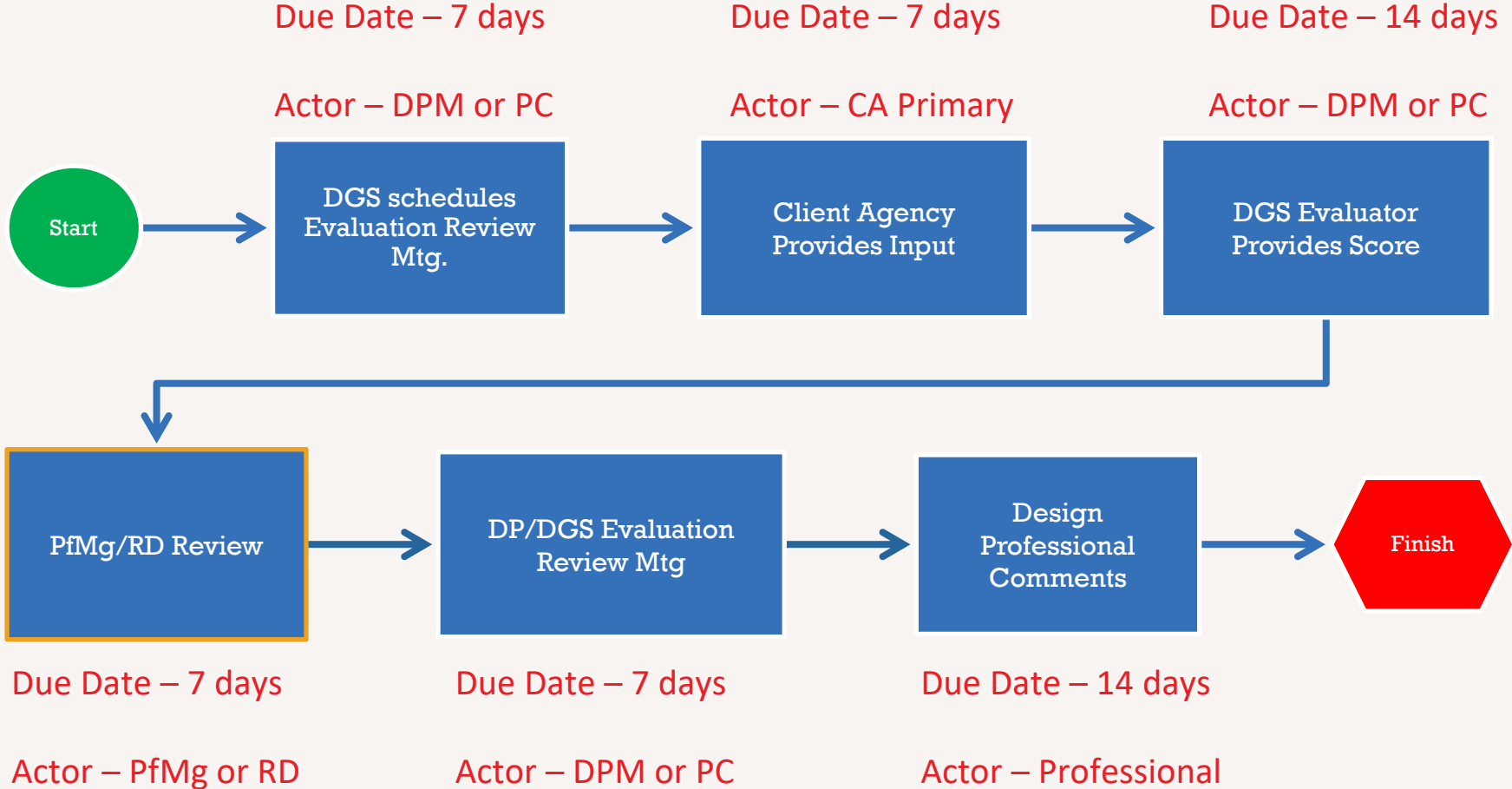
FPS 60 % → Sel Score 50 pts. → All 3's

FPS 100 % → Sel Score 100 pts. → All 5's

The Selection Score is added to the Firm's scoring matrix when they apply for work with DGS Capital Programs.



Process Timeline – 8 weeks



Questions?

If you have a question, you may:

- Use the **Raise Hand** feature to be taken off mute.
- Use the **Q&A** feature.

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