THE DESIGNER SELECTION NETWORK

DESIGNER SELECTION BOARD'S - DHCD WEB PORTAL for DESIGNER PROCUREMENT and EVALUATION

Welcome to the Designer Selection Board's web-based portal. The portal will serve LHAs and DHCD as a portal for:

- M.G.L. Ch.7c legislated designer evaluations required to be done by LHAs for all projects, and
- Designer Procurement on Requests for Service (RFS)-- advertising Requests for Service, receiving
 applications from designers, reviewing applications and other related designer selection
 documents, and recording the DHCD's Designer Selection Committee's decisions and
 documents.

This document will guide you through both processes. If along the way, you find that the document is missing elements to help you along, please let the DHCD DSC Coordinator know so that we can update the document to better serve you. The email for contacting the coordinator is DHCDdesignerselectioncoordinator@mass.gov

Initial Log in to the **DESIGNER SELECTION NETWORK** and continued use can be found at: https://dsb.formverse5.com/FORMVERSESERVER-DSB/WebApp/Login.aspx.

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Local Housing Authorities

Logging in

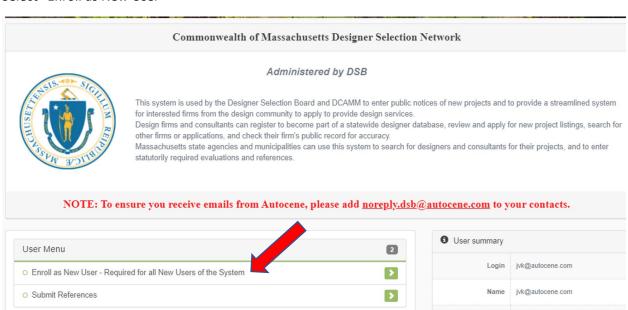
To Log in for the first time, select I don't have an account.



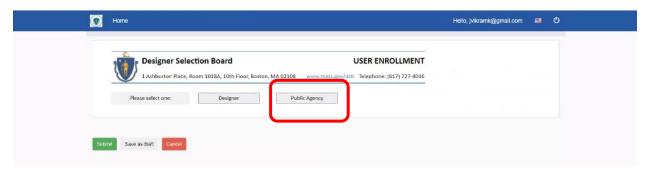
Enter your email.



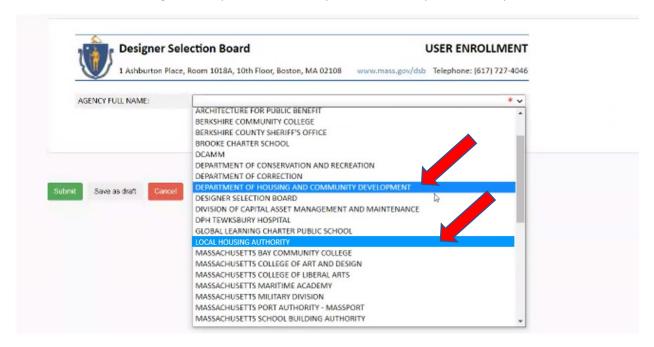
Select "Enroll as New User"



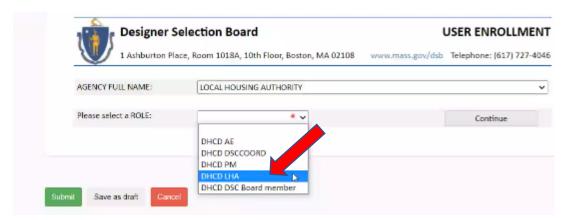
Select "Public Agency"



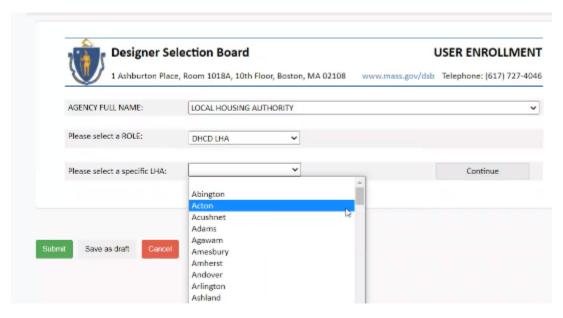
Select "Agency Full Name." You can then select "Department of Housing and Community Development" (DHCD) or "Local Housing Authority." Both will take you to the same place in the system.



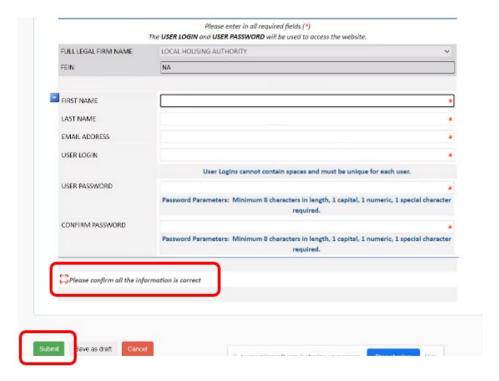
Select DHCD LHA



Select your LHA

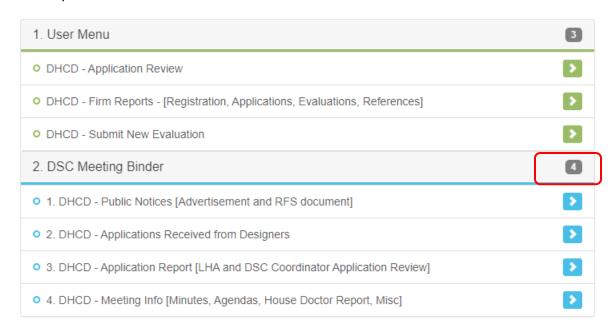


Fill out your info and password, click the "Please Confirm" box, and then click "Submit." You cannot "Save a Draft."



Home Page DASHBOARD

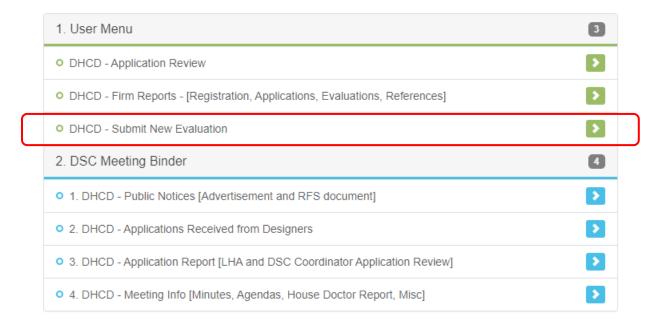
Once you have completed your Enrollment, you will now have access to your Dashboard. We will go through each Dashboard item seen below throughout the remainder of this document, including when it is necessary to use the item:



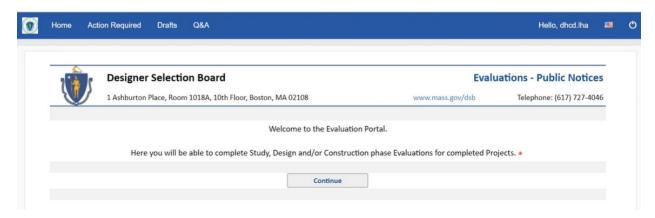
Click here to expand menu accordion

Doing a Designer Evaluation for Completed Projects

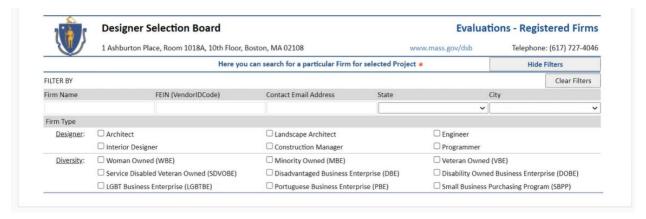
Unless you have a Request for Services (RFS) in process, the only selection you will use, for the most part, is "Submit New Evaluation" of Designers on your past projects. These evaluations can be seen by all Agency users in the system and by the design firm for which the evaluation is completed. They are required by M.G.L. Chapter 7c but will also be helpful when you are reviewing consultants for RFS projects or for any reason you want to know about a firm.



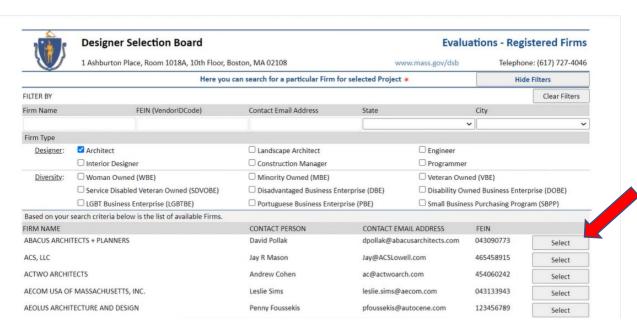
Select "Continue"



You can search for Designers based on many parameters

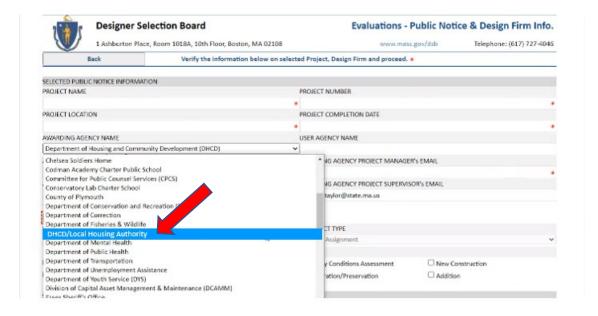


Select a Firm

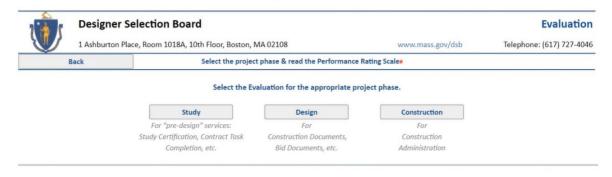


TIP: If the firm you are evaluating is not listed, you will need to request that the firm sign up on the **DESIGNER SELECTION NETWORK** and submit a Registration and Disclosure into the system. Firms can sign up at the webpage address: https://dsb.formverse5.com/FORMVERSESERVER-DSB/WebApp/Login.aspx

Input project information. For Awarding Agency Select "DHCD/Local Housing Authority"



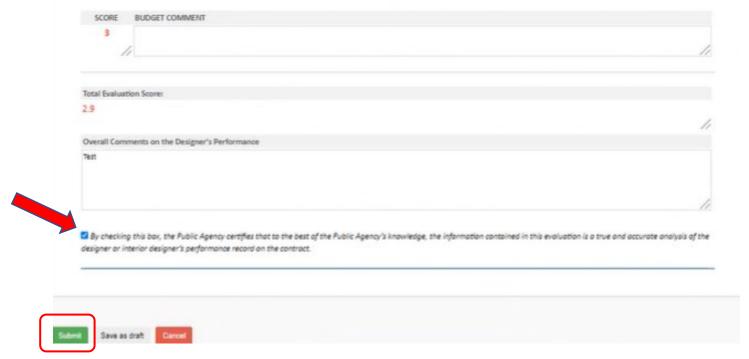
Select the Project Type. You may need to complete the review for more than one phase.



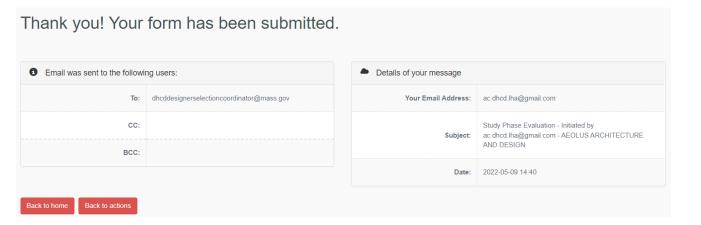
You can see explanations of the different categories and rating scales.



We highly recommend you fill out the comment sections, because this will give others special insights into your rating and make them more meaningful. Check the "By checking the box, the Public Agency certifies..." box and then hit "Submit" when completed.

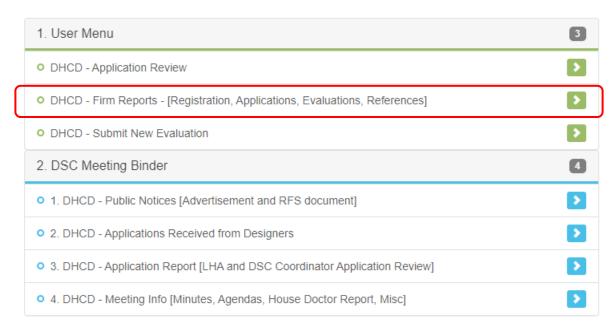


Once you submit, you will receive this notice on the screen. If you have additional Evaluations to do, select "Back to Home."

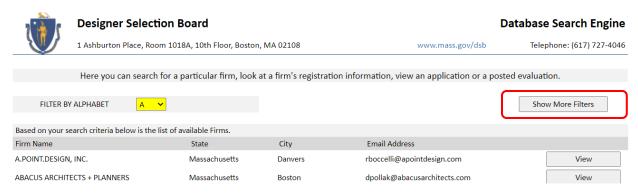


Firm Reports – Viewing Evaluations and other Firm Information

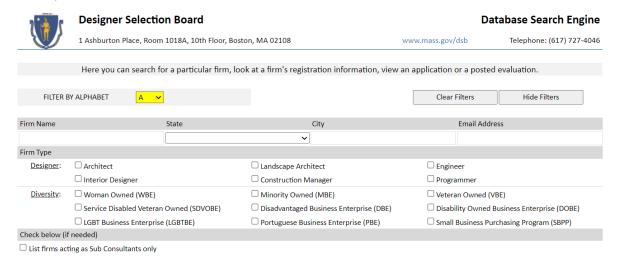
To see the Evaluations or other firm information in the **DESIGNER SELECTION NETWORK**. Select "Firm Reports" on your Homepage Dashboard.



Select the Prime Firm or Subconsultant you would like to view – you can filter by first letter of the firms name or select "Show More Filters" if you are looking for a particular type of firm, rather than just a firm name.



Filter options



Request for Services (RFS) – LHA Designer Selection Process

The DHCD Designer Selection Website has the full range of requirements for procuring and contracting for a designer. Click here to go to the website.

The full process for large projects can be found in the document the <u>DHCD Public Housing Large Project</u> <u>Guide for LHAs.</u> This will be updated with the Designer Selection Network information in short order.

The information on the website and in the documents will not be repeated here. This document will only outline what is required for the **DESIGNER SELECTION NETWORK**, although some items may be repeated for purposes of clarification.

Upon Bureau Director's Approval to Advertise, the LHA is notified by Cap Hub that the RFS has been approved and receives a timeline of important dates. The DHCD PM is responsible for placing the Central Register (CR) Ad. The LHA is responsible for placing an ad in local newspaper that runs concurrent with the CR ad dates— 2 week minimum is legislated from the due date of the application, although 3 weeks is recommended and is provided for in the DSC calendar. The PM will provide the LHA with a copy of the Central Register ad that they can use as a reference for their local newspaper ad. This example will be at the end of the Approval to Advertise Letter located in Cap Hub.

All designer applications submittals, LHA/DSC Application review comments, reference checks, and DSC Meeting Information will now be done in the **DESIGNER SELECTION NETWORK**.

The LHA is invited, but not required, to attend DSC meeting. At the DSC meeting, the Committee reviews and ranks the list of applicants, with input from the DHCD AE/PM and LHA if they are in attendance. The ranking will be recorded into the **DESIGNER SELECTION NETWORK**. The LHA may indicate preferences with justifiable reasons. The LHA may opt to use a Local Screening Committee. Most do not do this, but the instructions for that procedure are located at:

https://www.mass.gov/files/documents/2016/08/qx/lsc.doc

After the meeting, the DSC Coordinator will upload in Cap Hub and email a Ranking Letter to the LHA with the ranked Designers. The Ranking Letter also contains the link to the Designer Contract.

LHA Application Review and Comments

LHAs will go into the **DESIGNER SELECTION NETWORK** webpage to review the applications that have been submitted for their RFS projects. All of the information needed to do the review will be found on the webpage.

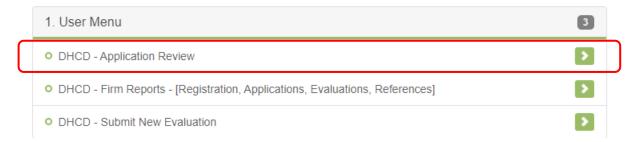
The link shown below is in Cap Hub and will take you to the portal at any time after the Approval to advertise is issued. Use this link or the link noted in the intro to this manual; both access the same web page.

Step 3: Upload Planning Document and Enter Milestones, Time Durations, and Fees

Waiting for DSC Ranking Letter

Link to RFS Web portal (Designer Selection Network)

Once in the **DESIGNER SELECTION NETWORK**, your Dashboard will direct you to the applications submitted, the review form to be completed, firm information, and then to the final Designer Selection Committee Meeting Information, The DSC Meeting information will be available 1 week before the DSC meeting, but after your application review has taken place.



Review Your Applications

A comprehensive review page is set up for you to review each applicantion for your project and to write comments. In the RFS in **Section G – Application Evaluation** are the criteria set up for the review of applicants. The section is divided into PERSONNEL and EXPERIENCE and FACTORS. Both you and the DSC will use this section as the basis for your review. **Section H – Project Requirements**, also includes items to be reviewed. The review will require you make notes on the following criteria at a minimum, but all criteria should be reviewed in some fashion:

- 1. Review of the Application for qualifications and Experience. Was the application responsive to the evaluation requirements of the RFS Scope? Do they appear to have the required experience needed to do the work of the project?
- 2. The Supplier Diversity Office's and RFS require Minority Business Enterprise (MBE) and and Women Businesse Entreprise (WBE) participation on projects with a fee of \$100,000 or more. The LHA should review the percentage criteria for diversity and also the applicant's Diversity Statement in Section 5 of the designer's application. Are there concerns for the designers ability to meet the goals? Does the designer's diversity statement promote diversity, equity, and inclusion? Do they appear to have met the minimum MBE and WBE participation goals of 6.6% MBE and 15% WBE of the overall value of the design contracts for this Contract/project, if required by the project (required for fees over \$100k)?
- 3. Review of evaluations or references **provided by the designer** in the applications. Additional references not included by the designer may also be added to your review and consideration.
- 4. Provide other relevant comments or concerns about the designer being reviewed.

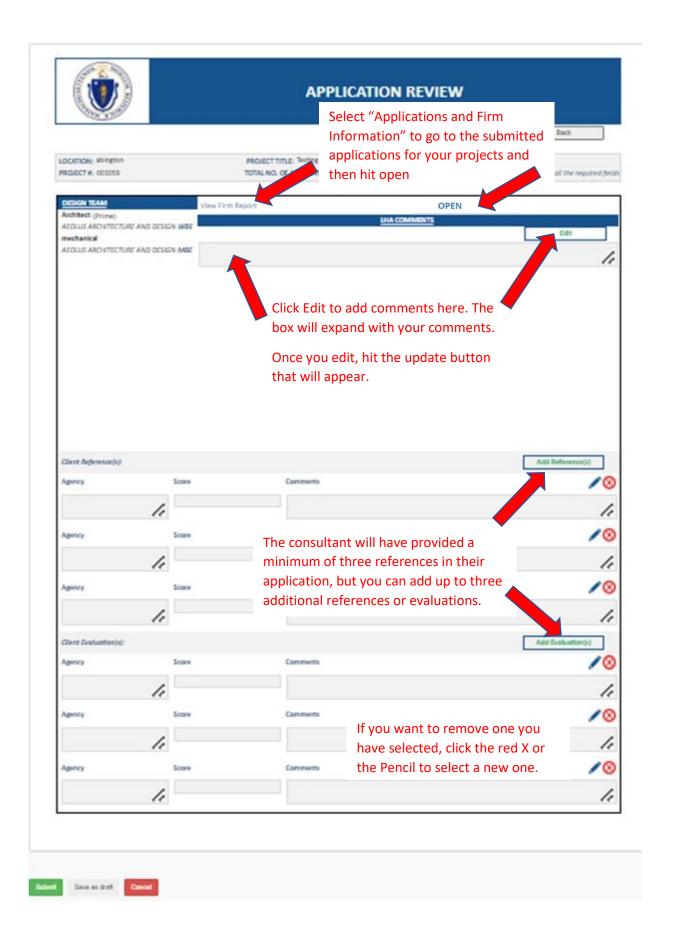
After you have selected "Application Review" on the Homepage Dashboard. Then select review.



Next select your project number. Others may be listed that are not yours.

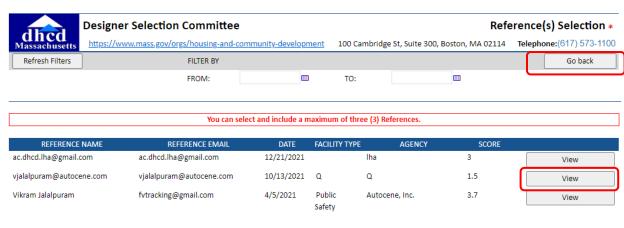


Once selected, the review form will include the full list of consultants for you to review. You can scroll down to each of them to write comments. The instructions above on what to review will also be included to guide you. A button will be at the top of the page to take you to the Applications and additional Firm Information. Be sure to "Save Draft" your work, but DO NOT hit SUBMIT until you are completely done and don't want to make any further changes. Note, there is no formating currently in the notes box. Try not to worry about that -- bothers me too, but so it goes at the moment.

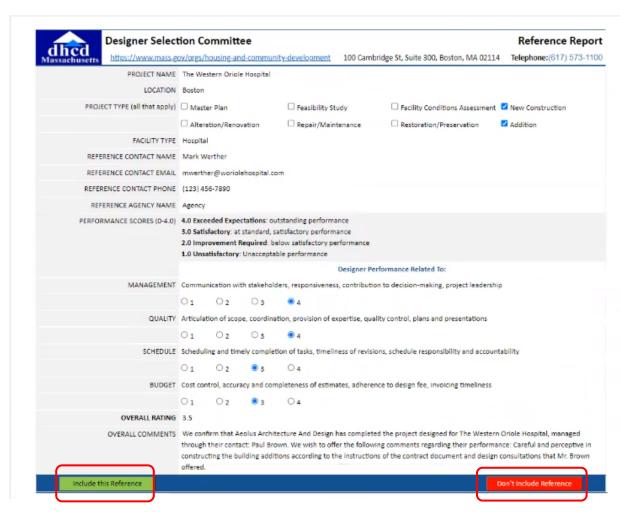


Add References and Evaluations

The "Add References" or "Add Evaluations" button will open to a list of all the references and evaluations in the system for the consultant. Select up to three to add to your review. Select to View the Reference or Evaluation, then click to add or not add to your review. If you have accidentally selected a reference, or selected the same one more than once, you can always remove the reference by selecting the Red X on the application review page. You can view the full reference by selecting the "View" button.



Review the Reference and choose to add it or not:



Hit go back if less than three are desired.

Select up to three. The view button will take you to the reference for review and selection If you have requested that someone provide you with a reference that is not currently in the system, you can "Save Draft" on your application review and return to add it once you know it has been added to the system. You may also write comments in your review if you have done a phone reference.

References and Evalutation can be added to the system by either logging in as an LHA and completing an evaluation or logging in as a guest and completing a reference. Ask your reference to log in at: https://dsb.formverse5.com/FORMVERSESERVER-DSB/WebApp/Login.aspx

If your reference is another LHA, they should log in and complete and evaluation of the project on which they worked with the designer. You can then attach the evaluation to your review.

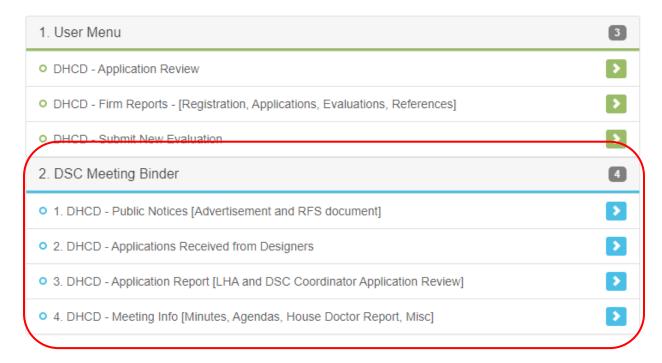
Additional Documents the LHA would like Included

If you think you might want to add documents, please contact the DSC Coordinator to discuss at DHCDDesignerSelectionCoordinator@Mass.gov The DSC Coordinator will add the documents for you so they are properly categorized for the meeting. The addition of documents is not required

The DSC Meeting

Meeting Documents

The week before the meeting, the DSC Coordinator will prepare the documents for the scheduled meeting date. All of the documents for the meeting will be in the DSC Meeting Binder section of the Dashboard.

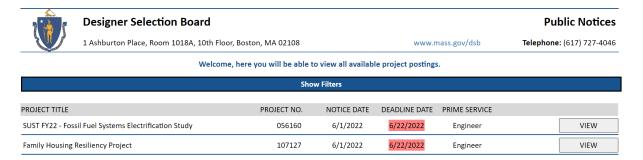


The Sections will include:

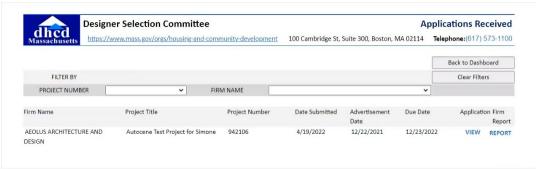
- 1. Public Notice Button The Request for Services is located here.
- 2. Applications Received Button The Design Consultant Applications are located here. They can be selected by project number. Adjacent to each application will be a button to view more information about the prime firm should anyone care to look.
- 3. Application Reviews Reports Button These are the reviews done by the LHA and the DSC Coordinator on each project, along with LHA selected references for the Applicants.
- 4. *Meeting Information Button* select the "Meeting Information" Type of Document, and then the documents with the date of the meeting and download to view:
 - a. Meeting Agenda The agenda will provide information on which projects are to be reviewed for the meeting. Only projects on the Agenda should be reviewed for the meeting.
 - Meeting Minutes The minutes will be from the previous meeting and will be voted on by DSC board members
 - c. Other Meeting documents there may be other special documents for the meeting. They will also be found in the Meeting Information section and will be noted with the meeting date and listed on the agenda.

DSC Meeting Binder:

a. Public Notice



b. Applications Received:



c. Application Review Reports:



d. Meeting Information:



DSC Committee Ranks the Applicants

During the meeting, the DSC boardmembers will discuss the applications and the LHA/DSC Coordinator application review. They may request an opening statement by DHCD and the LHA – as noted previously, the LHA is not required to attend. After the discussion the DSC board members will call for a vote on the applicants. Each applicant will be numerically voted on by the committee in sequential order. The tabulation will be added up and the applicant with the highest count will be ranked number one, and so on. If there is a tie ranking in the top three applicants the DSC will do a tie breaker vote.

The DSC Coordinator will electronically record the vote in the **DESIGNER SELECTION NETWORK**. A Ranking letter notification from Cap Hub will be sent to the LHA and DHCD staff after the meeting noting the top three firms in order, or alphabetically if a Local Screening Committee is being used. The Ranking letter which is stored on the Document Tab in the Planning box, will include instructions and a link to the Designer Contract.

Post Meeting Follow up

After interviewing the selected firm respond to the Ranking Letter email sent for the DSC Coordinator with a date of the interview with the firm. If your process used a Local Screening Committee, follow up with the ranking that the committee gave to the firms, 1, 2 or 3.

END OF DOCUMENT