
INDIANA DEPARTMENT OF TRANSPORTATION

LOCAL PUBLIC AGENCY
PROJECT DEVELOPMENT PROCESS

For

LPA Consultant Selection Toolkit
For Local Federal Aid Projects

Standard LPA Projects and
Local Bridge Inspections

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Introduction

This toolkit guides Local Public Agencies (LPAs) through the compliant selection of consultants for federally funded projects. It covers the RFP preparation, advertisement, evaluation, scoring, and final submission steps for:

- Standard LPA Projects
- Countywide Bridge Inspections (CWBI)
 - Differences specific to CWBI projects are summarized in the [‘Differences for Countywide Bridge Inspections \(CWBI\)’](#) section.

The consultant selection rules in this toolkit only apply when Federal dollars are used for professional services. If the services are paid entirely with local funds—and the costs will not be tied to federal construction funds—these requirements do not apply, regardless of whether the construction phase uses Federal dollars.

Key Contacts & Submittals

The key contact persons for all LPA consultant selection submittals and questions concerning these procedures are:

Standard LPA Projects: District Program Director (PD).

Countywide Bridge Inspections (CWBI): Central Office Bridge Program Manager (BPM).

The Local Public Agency (LPA) shall electronically submit the Request for Proposal (RFP) and the LPA Selection Review Checklist via email. All original documents must be retained for at least five years after construction closeout to meet audit requirements.

Core Rules & Requirements

Minimum LOI Requirement:

- LPAs must receive three (3) Letters of Interest (LOIs) to ensure competitive selection.
- If fewer than three are received, LPAs must provide evidence of significant recruitment efforts beyond advertising before selection can proceed. Lack of documentation requires re-advertisement.

Prequalification Requirements:

- The lead firm must be INDOT-prequalified in at least one category.
- All advertised prequalification categories must be covered by at least one (1) member of the consultant team (lead or sub).
- LPAs must retain documentation proving consultant prequalification at time of LOI submission.

DBE Goal Requirements:

Note: At this time, all DBE Goals are ‘0’. LPAs may therefore skip all DBE-related steps throughout this Toolkit.

DBE Goal Set Email

- A DBE Goal must be obtained from INDOT’s [Equal Opportunity Division \(EOD\)](#).
- The DBE Goal Set email must be included with the RFP submission, even if the goal is 0%.

DBE Goal Met Email

- Required only when:
 - DBE Goal > 0%, OR
 - DBE Goal = 0% and consultant voluntarily includes DBE participation.
- If the consultant offers less than the DBE goal, LPAs must request EOD guidance.

Template Use & Version Control:

Always download fresh versions of INDOT templates, rating sheets, and checklists. Only the advertised version is acceptable for scoring.

Phase 1 — Prepare & Advertise the RFP

Preparation Steps:

1. Contact District PD or CO BPM to obtain or confirm the INDOT DES Number.
2. Request DBE Goal from EOD (DBE Goal Request Form available online).
3. Download the appropriate RFP template:
 - Standard
 - Two-Step
 - Bridge Inspection
4. Edit the template to include all project details, i.e., DES Number(s), location, required prequalification's, and LPA contact information.
5. State clearly whether pre-screening interviews will be used; if so, use the Two-Step Template.
 - All requirements and procedures governing the pre-screening process must be explicitly stated in the advertised RFP.
6. Include the DBE Goal Set email when submitting the RFP for posting.
7. Submit the RFP to District PD or CO BPM for posting on the INDOT website.
8. Refer to [Reference A](#) for detailed instructions for completing the RFP template.

Advertisement Requirements:

- LPAs may advertise a single RFP covering any combination of the following phases: Preliminary Engineering (PE), Right-of-Way Engineering, Right-of-Way Services, or Right-of-Way Acquisition.
 - These phases may also be advertised separately if the LPA prefers to contract with specialized firms.
 - However, Construction Inspection (CI/CE) must always be advertised as a standalone RFP.
 - Federal Highway regulations do not allow CI/CE to be combined with other phases.
 - The only exception is that CI/CE may be combined with Utility Construction Inspection in the same RFP.
- The LPA will establish the posting date for the RFP on INDOT's website. The standard advertisement period is one month. A reduced advertisement period may be authorized by INDOT; however, under no circumstances may the posting period be fewer than fourteen (14) days.
- LPAs must initiate recruitment efforts when fewer than three (3) Letters of Interest (LOIs) are expected.
 - If the LPA anticipates receiving fewer than three (3) LOIs, it must conduct and document additional recruitment efforts beyond the standard website advertisement.
 - These efforts may include directly contacting INDOT-prequalified firms.
 - If fewer than three (3) LOIs are received, the LPA must provide documentation of these recruitment activities; otherwise, the RFP must be re-advertised.
- Select all required prequalification categories applicable to the RFP. Suggested prequalification requirements for common project types are provided in [Reference B](#).
 - Additional category descriptions and requirements may be found in [INDOT's Consultant Prequalification Manual](#) (Section H).
- The LPA will receive an email notification once the RFP has been posted. After posting, the LPA must download and retain the final advertised RFP.
 - Click the RFP Title at the bottom of the email notification to open the posted RFP directly.
 - Click 'LPA – RFP Current Advertisements' to view all advertised RFPs.
- LPA RFPs with expired response dates will be removed from [INDOT's LPA RFPs website](#).

Phase 2 — Evaluate LOIs & Verify Qualifications

LOI Review:

After the LOI due date:

1. Review all submitted Letters of Interest (LOIs) and confirm the total number received. A minimum of three (3) LOIs is required unless documented recruitment efforts justify proceeding with fewer.
2. Verify prequalification using [INDOT's List of Prequalified Consultants](#).
3. Email the PD to request Past Performance Scores for all firms (list full names).
 - a. CWBI projects do not have Past Performance Data; scores are always zero.

Verification Requirements:

- Verify that all submitting consultant firms or teams meet the advertised prequalification requirements using [INDOT's List of Prequalified Consultants](#).
- Verify the lead firm is INDOT prequalified in at least one (1) category. This can be any prequalification category, whether advertised in the RFP or not.
- All advertised categories must be covered by at least one (1) member of the consultant team (lead or a sub).
- Maintain documentation confirming that each submitting firm or team was properly prequalified at the time of LOI submittal.

Phase 3 — Scoring & Ranking Consultant Teams

Scoring Setup:

- A scoring team of at least three (3) individuals must evaluate the LOIs, with one (1) serving as the Team Leader.
- All scorers and the Team Leader must be a representative of the LPA and familiar with the project and capable of providing impartial evaluations of each consultant's qualifications.

Rating Sheets:

- Scoring must be conducted using the LPA Consultant Selection Rating Sheet included in the advertised RFP.
 - Rating sheet templates — Standard & Two-Step and Bridge Inspection—are available on INDOT's [LPA Consultant Selection](#) webpage.
- Firms must be scored and ranked from highest to lowest based on the established evaluation factors.
 - In the event of a tie among the top-ranked firms, the selecting official must determine the most qualified firm and document the basis for that decision.

Scoring Rules: Using the LPA Consultant Selection Rating Sheet. Each sheet evaluates five (5) categories, generating seven (7) weighted scores. Past Performance scores must be used as provided, even if zero.

Scorers:

- Score independently.
- Must receive a complete set of rating sheets (one per consultant).
- Must use only values in the Scale column.
- Must score all firms that meet prequalification requirements.
 - For final scoring following pre-screening or interviews, scorers must evaluate all interviewed consultant teams.
 - Firms that do not meet prequalification requirements are not to be scored.
- Must sign and date each rating sheet.
- Except for Past Performance, scorers must evaluate independently and shall not rely on anecdotal information or provide preferential treatment.

Team Leader / ERC:

- Will complete the header and enter Past Performance scores (when applicable) for each rating sheet (one per consultant) before providing copies to scorers.
- Ensure firms met prequalification requirements and those meeting requirements were scored.
- Ensures accuracy of final scoring sheets.
- Ensures correct past performance usage.
- Ensure scorers sign and date each rating sheet.
- Enters weighted totals into the Consultant Scoring Tabulation Sheet.

Ranking:

- Ranking must be conducted using the LPA Consultant Scoring Tabulation Sheet.
 - Tabulation sheet template — is available on INDOT's [LPA Consultant Selection](#) webpage.

- If pre-screening is not used, list all the lead firms that meet the advertised prequalification requirements on the Tabulation Sheet.
- If pre-screening is used, prepare two (2) Tabulation Sheets:
 - One listing all prequalified lead firms for the pre-screening stage.
 - One listing all interviewed lead firms for final scoring.
- Sum weighted sub-totals.
- Rank consultants (highest score = Ranking #1).
- Address ties with documented justification.
- ERC signs and dates the Tabulation Sheet.
- Refer to [Reference C](#) for detailed scoring and team leader instructions.

Phase 4 — LPA Selection Review Checklist Submission & INDOT Approval

LPA Selection Review Checklist for Standard Projects:

Submit the following to the District PD:

- RFP advertisement
- DBE Goal Set email
- DBE Goal Met email (if applicable)
- Past Performance data
- All scoring sheets and tabulation forms
- Affirmative Action form (#1 ranked firm)
- Prequalification documentation
- Completed LPA Selection Review Checklist

LPA Selection Review Checklist for Bridge Inspections for CWBI Projects:

Submit all Standard items **plus**:

- BIAS Database verification from CO Bridge Inspection Business System Consultant Associate.
- Email [Sharon Street](#) with the advertised RFP to request verification.

Approval:

- District PD or CO BPM will notify the LPA upon checklist approval.
- Once approved, LPAs may begin negotiating with the #1 ranked consultant.
- Refer to [Reference D](#) for detailed LPA Selection Review Checklist instructions.

Differences for Countywide Bridge Inspections (CWBI)

- Use Bridge Inspection templates.
- Requires BIAS database confirmation.
- Past Performance scores are always zero.
- All minor procedural differences are noted within the instructions.

Reference A – Instruction for Completing the RFP Template

1. Enter LPA Name: The name of your local public agency.
 - a. CWBI = County: The name of the county.
 - b. CWBI = Cycle Years: Enter the cycle years this RFP covers.
2. Project Description & Location: Enter a short services description and location of the project you are advertising.
3. Des #: Enter the Des Number(s) assigned to the project you are advertising.
4. District Name: Enter the name of the INDOT District that is overseeing the project.
5. Response Due Date & Time: The due date and time you want all Letters of Interest submitted to your LPA.
6. Contact Questions: Complete with your LPA's information and the contact person for your LPA.
7. Submittal Requirements: Complete all fields that apply to your requirements of submittal.

8. Submit To: Complete with your LPA's information and the contact person for your LPA.
'Work Item Details' page of the template
9. Local Public Agency: The name of your local public agency.
 10. Project Location: Location of your project.
 11. Project Description: Description of the work advertising.
 12. INDOT Des #: Enter the Des Number(s) assigned to the project(s) you are advertising.
 13. * Services: For CWBI RFP only.
 14. Phases Included: Enter the phase(s) you are advertising.
 - a. CWBI = will select the Bridge Inspection phases and enter the years.
 15. * Month(s) Compliance Date: For CWBI RFP only.
 16. Estimated Construction Amount: Enter the estimated amount.
 17. Funding: Enter the Federal funding involved or 100% local funds.
 18. Term of Contract: Enter contract duration (e.g., 2 years) or 'Until Project Completion'.
 19. DEB Goal: Enter the DBE Goal percentage.
 20. Required Prequalification Categories: Click all that apply to this advertisement or click the link to add additional categories.
 - a. Refer to [Reference B](#) for Suggested Prequalification Requirements for Various Project Types.
 21. Save for your files.

Reference B – Suggested Prequalification Requirements for Various Project Types

- Preliminary Engineering: Includes Environmental Services, Topographic Surveying, Design, Utility and Railroad Coordination, and Right of Way Engineering (abstracting and right-of-way plan development).
- Right of Way Services: Includes all right-of-way acquisition services (Appraisal, Negotiation, Closing, Relocation, etc., but not Right of Way Engineering).
- Construction Engineering: Construction Inspection.

The following are the minimal prequalification categories:

Road Project:

- 5.2 Environmental Document Preparation – CE
- 6.1 Topographic Survey Data Collection
- 8.1 Non-Complex Road Design *
- 11.1 Right of Way Plan Development
- 12.1 Project Management for Acquisition Services
- 12.2 Title Search
- 12.4 Appraisal
- 12.5 Appraisal Review
- * might require 8.2 Complex Road Design

Bridge Project:

- 5.2 Environmental Document Preparation – CE
- 6.1 Topographic Survey Data Collection
- 9.1 Level 1 Bridge Design *
- 11.1 Right of Way Plan Development
- 12.1 Project Management for Acquisition Services
- 12.2 Title Search
- 12.4 Appraisal
- 12.5 Appraisal Review
- * might require 9.2 Level 2 Bridge Design

Construction Inspection:

- 13.1 Construction Inspection

Transportation Alternatives (Trail) Project:

- 5.2 Environmental Document Preparation – CE

- 6.1 Topographic Survey Data Collection
- 8.1 Non-Complex Road Design
- 11.1 Right of Way Plan Development
- 12.1 Project Management for Acquisition Services
- 12.2 Title Search
- 12.4 Appraisal
- 12.5 Appraisal Review

Bridge Inspection (4 year):

- 14.1 Regular Bridge Inspection
 - 14.2 Complex Bridge Inspection *
 - 14.3 Underwater/In-Water Bridge Inspection *
 - 14.5 Bridge Load Capacity Rating and Other Bridge Analysis/Training *
- * may not be required

Sign Replacement:

- 5.2 Environmental Document Preparation – CE
- 6.1 Topographic Survey Data Collection
- 8.1 Non-Complex Road Design

Reference C – Instructions for Scoring: Scorers – Team Leaders - ERC

Any changes made to the LPA Consultant Selection Rating Sheet (Standard or Bridge Inspection) or the LPA Consultant Selection Scoring Tabulation Sheet must be initialed by the individual whose signature appears on the form, confirming awareness and approval of the revision. If a score change affects the Weighted Score, Weighted Sub-Total, or the Tabulation Sheet, each resulting change must be initialed. As an alternative, start over again with a fresh form.

Scorers:

Only the scores listed in the Scale column of the LPA Consultant Selection Rating Sheet (Standard or Bridge Inspection) are permitted. The Scoring Criteria column defines the meaning of each allowable score, where zero indicates average performance, positive values indicate performance above average, and negative values indicate performance below average.

Scoring must be completed on the appropriate LPA Consultant Selection Rating Sheet, each of which contains five (5) Categories and produces seven (7) Weighted Scores using predefined weights.

Category:

For all other scoring categories, the scorer must select a value from the Scale column based solely on the corresponding descriptions in the Scoring Criteria column. Only the values listed in the Scale column are permitted; any other score will invalidate the Rating Sheet.

1. **Past Performance:** The three scores based on historical performance data provided by INDOT must be entered and used in all calculations, even when the values are zero.
2. **Capacity of Team to do Work:** Assess personnel and equipment availability, considering current and anticipated workload. Additional capacity should only be credited when it provides added value.
3. **Team's Demonstrated Qualifications:** Evaluate specialized expertise and resources that would result in increased cost, reduced development time, enhanced design quality and/or improved constructability. Capabilities that do not add value shall not be scored above zero.
4. **Project Manager:** This is an evaluation of the project manager's ability to manage the project, based on prior experience.
5. **Approach to Project:** Assess the team's understanding of the project and any proposed innovations that may improve cost or schedule efficiency.

Calculating Weighted Sub-Total: Each Score must be multiplied by the assigned Weight and entered in the Weighted Score column. The Weighted Sub-Total is then calculated by summing all seven Weighted Scores. Scorers must ensure arithmetic accuracy. After completing the sheet, the scorer must sign and date the form and submit it to the Team Leader.

Team Leader / ERC:

The Team Leader must be an LPA representative who is fully knowledgeable of the scoring process. The Team Leader may assist scorers in understanding the procedure but must not influence their independent scoring decisions. The Team Leader is responsible for advising scorers of the correct Past Performance scores.

Upon completion of scoring, the Team Leader must review each LPA Consultant Selection Rating Sheet for compliance and arithmetic accuracy. When all sheets are verified, the Team Leader enters each scorer's Weighted Sub-Totals into the appropriate fields on the LPA Consultant Selection Scoring Tabulation Sheet.

The Team Leader / ERC must then:

- Ensure all header information is complete.
- Sum the Weighted Sub-Totals for each consultant to determine the Weighted Score Total.
- Rank consultants in descending order of total score; largest number being ranked as "1" in the Ranking column.
- If the Team Leader is not the ERC, forward the completed Tabulation Sheet and the LPA Consultant Selection Review Checklist and scoring documentation to the ERC for signature.

Employee in Responsible Charge (ERC):

The ERC must sign and date the Consultant Scoring Tabulation Sheet and transmit all scoring documentation to INDOT's key contact, along with the applicable LPA Selection Review Checklist. Refer to [Reference D](#) for detailed LPA Selection Review Checklist instructions

Reference D – Instructions for LPA Selection Review Checklist

The checklist must be completed by the ERC and outlines all items the ERC is responsible for submitting to INDOT in order to obtain consultant approval. Please ensure you are using the most current versions of both the [LPA Selection Review Checklist](#) and the [LPA Selection Review Checklist for Bridge Inspections](#) available on our [website](#).

1. Local Public Agency: Enter the name of the LPA as shown on Page 1 of the advertised RFP.
2. County: Enter the county where the project is located.
3. Project Description: Provide a description of the work as advertised.
4. Des #: Enter all Des numbers assigned to the project (found on Page 1 of the advertised RFP).
5. Posting Date: Enter the date the RFP was posted on INDOT's website (found on Page 1 of the advertised RFP).
6. District: Enter the INDOT District overseeing the project.
7. RFP requested services for: Check all applicable phases of work as listed in the RFP.
8. Documentation Required w/Checklist: – Submit a copy of all applicable documents (except those marked "N/A") to the District Project Delivery (PD) office along with the completed Checklist.
 - a. Request for Proposal (RFP) Advertisement – The RFP that was advertised on INDOT's website.
 - b. DBE Goal Set email – Documentation required. The email from INDOT's EOD establishing the DBE Goal. Enter the set goal on the provided line.
 - c. DBE Goal Met email – The email from INDOT's EOD confirming the goal has been met. "N/A" if goal is 0%. "YES" if goal is greater than 0%.
 - d. Past Performance Data as provided by INDOT – The email from the District PD showing Past Performance scores for each firm. Scores may be "0" for work types without INDOT Past Performance data (e.g., Countywide Bridge Inspections). [Not required on CWBI Checklist](#).
 - e. Scoring Tabulation Form and Score Sheets – Every scorer's score sheet and the completed Scoring Tabulation form. If pre-screening was used, include both pre-screening and final scoring documentation.
 - f. Affirmative Action Certification Form – The form provided by the #1 ranked firm with their LOI. Enter "N/A" if goal is 0%. Enter "YES" if the goal is greater than 0%.
 - g. Proof of Prequalification – The list of firms that provided LOIs showing the INDOT Prequalification Categories for which they are approved. This information comes from the List of Prequalified Consultants.
 - h. BIAS Database email provided by CO Bridge Inspection Business System Consultant Associate – The email from the Central Office Bridge Inspection Business System Consultant Associate stating that the bridges listed in the RFP are consistent with the bridges in the BIAS database.

- Email Sharon Street at sstreet@indot.in.gov with a copy of the advertised RFP to verify the list of bridges in the RFP match the list of bridges shown in the BIAS Database. [Only required on CWBI Checklist.](#)
- 9. General Information: Answer the questions.
 - a. Numbers of Letters of Interest received – Enter the number received. If fewer than 3 LOIs were received, attach documentation showing significant recruitment efforts beyond advertising (see Procedural Step I.E.2.).
 - b. If pre-screening was used, was it consistent with the process advertised in the RFP – self-explanatory.
- 10. Score Sheets: Check each to confirmation each task completed.
- 11. Tabulation Sheet: Check each to confirmation each task completed.
- 12. Certification of LPA Employee in Responsible Charge (ERC): The ERC must sign and date.

Reference Material

-  All templates, rating sheets, and checklists are available on our [INDOT's LPA](#) website.
-  Find your District Local Program Director on our [INDOT's LPA](#) website.