

## **CHAPTER 5 SHORTLIST DETERMINATION BY SELECTION COMMITTEE**

### **5.0 GENERAL**

The Professional Services Selection Package; Letters of Response; Scope of Services; and Detailed Consultant Analysis Report, will be packaged and transmitted to each Selection Committee member for their review prior to or at the scheduled selection meeting. The shortlist meeting shall be conducted as a public meeting. The Selection Committee may review and consider the information in the Detailed Consultant Analysis Report (where available), along with the longlist/shortlist recommendations from the TRC when determining the final shortlist.

The Selection Committee will shortlist no less than three Consultants. Where multiple contracts are being selected with one advertisement, at least two more Consultants than number of contracts being awarded will be shortlisted.

The Selection Committee may, at its discretion, deviate from the recommendation of the TRC, and may consider other firms from the longlist for purposes of shortlisting. The Committee is not limited to shortlisting from the list of longlisted Consultants; however, whenever the Committee elects to shortlist other qualified Consultants who are not on the longlist but did submit a LOR/Qualification, the selection file must be documented by the PSU as to the reasons for the selection. The Selection Committee shall also make the final determination on responsiveness of all Consultants who submitted in response to the advertisement. At a minimum documentation will consist of the longlist/shortlist portion of Professional Services Selection Package.

Race or gender set-asides, preferences or quotas shall not be considered when making contracting decisions.

### **5.1 SHORTLIST CONSIDERATION FACTORS FOR THE SELECTION COMMITTEE**

Factors to be considered by the Selection Committee when making the shortlist decision include but are not limited to the following:

- (A) Past performance evaluations received by the Consultant on current and previous Departmental projects, or other performance data included by the Consultant in the LOR/Letter of Qualification/Expanded Letter of Response as applicable, and work experience including specialized experience.
- (B) The workload of each Consultant, as evidenced by the number of similar projects the Consultant is shortlisted on that have not had a final selection, as well as the residual fees remaining to be paid to the Consultants on active agreements.

- (C) Availability of proposed Consultant personnel.
- (D) Balancing the needs of the project to the abilities of the Consultants.
- (E) The Consultant's working relationship/experience with the Department on previous projects.
- (F) The general and specific information used to longlist the Consultants (i.e., prequalification restrictions, etc.).
- (G) Proposed subconsultant teaming (also applicable for projects advertised with DBE and Small Business under-utilized goals).
- (H) Detailed Consultant Analysis Report, where available.

Race or gender set-asides, preferences or quotas shall not be considered when making contracting decisions.

## **5.2 SHORTLIST POSTING/DOCUMENTATION**

At the conclusion of a shortlist meeting, the PSU will: complete the minutes from the shortlist meeting on the **Professional Services Selection Package** Form; and input the names of the responding firms and shortlist data into the Procurement Application. This Form will become part of the permanent project file. The results of the meeting will then be published on the Procurement Internet website.

The Professional Services Selection Package shall document the decision by the Selection Committee, including the reasons for selecting the shortlisted firms. LORs, selection notes, and comments which reveal Consultant's technical approach shall not be released after posting the shortlist. The Procurement Office may release the shortlist package excluding the LORs. LORs, selection notes, and comments may be released after the posting of the final ranking.