Initial Selection
Initial Selection

- Relevant projects in Section F of the SF 330 will be based on individuals who are listed in the organizational chart.

- Reference check from the client who received the services will be required for five of the ten projects listed in Section F of SF 330.
Initial Selection

• Each Consultant Selection Committee (Panel) member will evaluate the SOQs Independently by documenting Strengths & Weaknesses with SOQ page/section references in support of the SOQ Initial Evaluation Criteria

• Panel members will be required to submit their SOQ raw scores and Strengths & Weaknesses to the A&E Analyst for compilation

• Shortlisted Consultant Firms will continue to the next phase of the process
Final Selection
Final Selection

• Consultant Selection Committee (Panel) will consist of the Contract Manager + 4 Committee Members

• Interview questions are developed by the Contract Manager + 2 Committee Members

• Questions are kept confidential and presented to the entire Committee on the day of the interview for review and comprehension

• Shortlisted firms will receive an Example Task Order with the Interview Letter to present the approach, challenges, key staff’s availability and ability to deliver the Example Task Order
Final Selection

• Firms will be provided time to review Technical Approach Questions prior to the Example Task Order Presentation, in the same room as the Consultant Selection Committee.

• This review time will be closed book with no white boards, easels, or electronic devices permitted.

• Technical Evaluation Part A: The firm’s response presentation to the Example Task Order’s approach, challenges, key staff’s availability and ability to deliver.
Final Selection

• **Technical Evaluation Part B1**: The firms will answer **Technical Scenario Questions**

• No follow up questions to the Technical Scenario Questions will be allowed

• No SOQ Clarifying or Standard questions will be developed
Final Selection

• **Technical Evaluation Part B2**: The firms will have time for a **Closing Statement** that adds to the **Technical Scenario Questions** (increase score)

• **Initial Evaluation Total**: The Initial Evaluation final score will be included as part of the Final Score with a weight of 25%
Final Selection

Final Ranking Process Summary:

1. The Consultant Selection Committee will evaluate the Task Order Presentation & Interview independently

2. Each Committee member will submit their raw score to the A&E Coordinator

3. Collectively, the Committee will Review and Document the Strengths and Weaknesses of each Firm

4. The Committee will Prepare the Consensus Ranking and Certify
# Overall Interview Schedule

*The Contract Specific Interview Schedule will be detailed in the Interview Letter*

<table>
<thead>
<tr>
<th>Schedule</th>
<th>Time Allotted In Minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consultant's Scheduled Arrival Time and Sign In</td>
<td>10</td>
</tr>
<tr>
<td>Consultant Interview Set up</td>
<td>5</td>
</tr>
<tr>
<td>Technical Scenario Questions Review</td>
<td>30</td>
</tr>
<tr>
<td>Example Task Order Presentation (Part A)</td>
<td>10 - 15</td>
</tr>
<tr>
<td>Technical Scenario Questions by Selection Committee (Part B1)</td>
<td>25 - 35</td>
</tr>
<tr>
<td>Consultant’s Closing Statement on Technical Scenario Questions (Part B2)</td>
<td>2</td>
</tr>
<tr>
<td>Caltrans’ Closing Statement</td>
<td>1</td>
</tr>
<tr>
<td>Consultant’s Take Down Equipment and Exit</td>
<td>2</td>
</tr>
</tbody>
</table>