

**ST. JOSEPH DEPARTMENT OF PUBLIC & TRANSPORTATION**  
**Professional Services Selection Process**

Pursuant to Missouri Revised Statutes Chapter 8, Section 8.285, it shall be the policy of the Department to select professionals on the basis of qualifications. Fees shall not be submitted, discussed, or made a part of the selection process.

The selection process shall utilize standard evaluation forms that include at a minimum the factors included in state statute. These factors have been included on a standard form developed by the Department and shall be used on all projects without variation. The evaluative factors may be weighted differently by project to conform to the unique requirements of each project and the corresponding factors that should have more significance than others for the given project.

Weighted evaluation forms shall be provided to the professional in-advance of the advertisement for services.

A Review Panel shall be formed by the Project Manager assigned to the project, subject to review by the Director or his designee. The Panel shall be comprised of at least three (3) but no more than five (5) staff members. Membership may include the Department Director or Division Manager responsible for the project, a key staff person with information or perspective that is important to the project, or other members of the Public Works Department. The Panel may be asked to review written proposals and to reduce a large field of proposals to a "short list". Depending upon the size of the project, the Panel may then review the short listed field and make a selection based upon the documentation provided, or ask the short listed firms to make a presentation.

*Weighting*

The consultant evaluation form provides the Project Manager the ability to place more emphasis on some factor areas than others. This is appropriate as no two projects are the same, whether because of complexity, schedule, location, scale, etc.-. The Project Manager may, at his discretion, weight the evaluation factors or request the input of the review panel. At no point shall all evaluative factors be given the same weight. The weighted evaluation form shall be provided to prospective consultants in-advance of document submittal.

*Consultant Preparation Before Interviews*

Most consultant teams want to be as prepared as possible to provide a thorough and interesting presentation to the panel. To do so the consultants normally will ask for background information and will ask to speak to project representatives to become familiar with any issues or items of concern that will be of large concern to the review team and the project.

It is important that the panelist understand that consistency is paramount during the fact-finding phase of the presentation preparation process, and that although many of the panelists know about the project, some may not have identical perspectives. That said, the points of contact made available to the consulting teams shall be limited to either the Project Manager and/or the Owner (Division, Department, or staff member responsible for working with or managing the project upon completion).

Participating in working lunches with prospective consulting firms during this phase shall not be permitted as it important to maintain the highest level of professionalism at all times during the selection process.

*Process of Initial Review*

Written proposals submitted by consulting firms shall be reviewed using the criteria found within the Evaluation Form. Additionally, it is mandatory that a reference check of each firm be conducted and documented on the reference check form. If the consultant lists a City project as a reference, it is acceptable to contact the Project Manager for that project and include in the reference evaluation.

The quality of the proposals will likely vary, depending upon the level of research conducted by the firm, along with reference input obtained through the reference check. These variations shall be independently evaluated by each panel member, resulting in an individual ranking by each team member. The project manager shall then tabulate the scores as set forth in this example:

**Tabulation Example**

Panel Members	Firm #1 Scores	Firm #2 Scores	Firm #3 Scores	Firm #4 Scores	Firm #5 Scores
#1	3	1	4	2	5
#2	2	1	5	3	4
#3	1	2	4	3	5
Total	<b>6</b>	<b>4</b>	<b>13</b>	<b>8</b>	<b>14</b>

In this example the three firms with the lowest score (firms #1, #2, & #4), meaning the overall highest rankings, would be selected for additional evaluation. No more than 3-4 shall be selected for the short-list.

*Final Step – Review & Selection*

It is not necessary to require consultants to make presentations for each and every project. Because of the time and expense involved in such a step, staff should remain mindful of the relationship between the anticipated size of the project and the cost a firm will incur in making a presentation.

Another factor to consider in making a determination concerning whether or not a presentation is necessary depends directly upon the thoroughness of the presentations submitted, the overall number of firms that submitted, the initial scoring/evaluations at the short-list level review, and the time available for presentations.

If singly, or in combination, these factors apply, the Project Manager may propose to the Director or his designee that the presentation/interview process is not necessary. If the Director or his designee concurs, the panel shall re-convene and discuss the proposals further. At the conclusion of review and discussions, the panel shall score the proposals as in the following example:

### Tabulation Example#2

Panel Members	Firm #1 Scores	Firm #2 Scores	Firm #4 Scores
#1	2	1	3
#2	2	1	3
#3	1	2	3
Total	<b>5</b>	<b>4</b>	<b>9</b>

#### *Interviews/Presentations*

For projects that have been selected as appropriate to use interviews, it is preferable to schedule all of the firms in a single day. Interview time shall provide the firm 30 minutes for presentation, 15 minutes for question and answer, and a 15 minute break for the team and to allow time for the next consultant to get setup in the interview room.

Reviewers shall take notes during the presentations suitable for reference in completing the evaluation forms either after or during the presentations. The panel may be convened by the Project Manager to discuss the presentations in aggregate and ask panelists to score at that time. At the conclusion of individual scoring, the scores shall be tabulated using the format provided in Tabulation Example #2. Panelist scoring sheets shall be signed and given to the Project Manager for the file.

#### *Typical Schedules*

Once selection is made, negotiating the scope, fee, and contract itself can take a considerable amount of time. There really is not a “typical” schedule because each project is different.

Factors that influence this process include:

- Firm familiarity with and willingness to sign City contract.
- Complexity of the project and the corresponding time necessary to develop a detailed scope.
- Time necessary to negotiate a scope to accurately reflects City needs.
- Time necessary to negotiate a fee.

The following represents a scenario that assumes a series of nearly perfect outcomes, with a firm that already knows in detail what the scope is, no negotiation regarding fees is needed, and is ready to sign the City contract as presented:

- Solicit proposals -4 weeks
- Interviews scheduled/conducted -4 weeks
- Reference check/selection decision -2 weeks
- Negotiate contract/scope/fee -8 weeks
- Council approval -5 weeks  
23 weeks\*

\*Best case scenario