

CONSULTANT SELECTION CHECKLIST

Reference	Section A - Project Data	FORMAT	Completed?			Notes
			YES	NO	N/A	
LAG Section C Chap. 12	a. Is the project in the STIP and the funding been obligated?	On file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
LAG Section C Chap. 12	b. Did the Certified Local Agency use an ODOT approved consultant selection process? Check one: <input type="checkbox"/> Certified Local Agency qualification based selection process <input type="checkbox"/> Certified Local Agency direct appointment process <input type="checkbox"/> ODOT two-tiered selection process (Note: if using this process, then no need to proceed with this checklist)	On file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
LAG Section C Chap. 12	c. Does the statement of work include the following elements? <input type="checkbox"/> Detailed description of products or services <input type="checkbox"/> Delivery schedule for required work	On file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	During the test project phase, local agencies must submit the draft statement of work to their LAL who will forward it to ODOT Procurement staff for review unless otherwise approved by ODOT.
LAG Section C Chap. 12	d. Was a detailed cost estimate including the following elements developed? <input type="checkbox"/> Direct labor costs <input type="checkbox"/> Indirect costs <input type="checkbox"/> General administrative costs <input type="checkbox"/> Other direct costs <input type="checkbox"/> Sub-consultant costs <input type="checkbox"/> Net fee or profit	On file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	During the test project phase, local agencies must submit the cost estimate to their LAL who will forward it to ODOT Procurement staff for review unless otherwise approved by ODOT.
LAG Section C Chap. 12	e. Was specific consultant selection criteria developed and used by the Certified Local Agency in this selection?	On file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	During the test project phase, local agencies must submit the selection criteria to their LAL who will forward it to ODOT Procurement staff for review unless otherwise approved by ODOT.
LAG Section C Chap. 12	f. Did the Certified Local Agency work with ODOT's Office of Civil Rights to identify items such as the applicability of a DBE goal, required forms, etc?	On file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Reference	Section B - Certification Approval Documentation	FORMAT	Completed?			Notes
			YES	NO	N/A	
LAG Section C Chap. 12	a. Has the Certified Local Agency been certified in Consultant Selection?	On file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<i>Date conditionally certified:</i> _____ <i>Date certified:</i> _____
LAG Section C Chap. 12	b. Did the Certified Local Agency follow its procedures, as approved by ODOT and outlined in the following documents. Check all that apply. <input type="checkbox"/> Purchasing Manual <input type="checkbox"/> Relevant Ordinance(s) <input type="checkbox"/> Templates/forms <input type="checkbox"/> Other documentation (e.g. OAR 137)	On file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	OPO must participate in the test project reviews and review these documents, prior to the local agency transitioning into full Certification unless otherwise approved by ODOT.
LAG Section C Chap. 12	c. Have any revisions to the items described in (b) above been formally reviewed and approved by ODOT?	On file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<i>Approval date(s) per OPO review, list each separately:</i> <i>Purchasing Manual</i> _____ <i>Relevant Ordinances</i> _____ <i>Template/forms</i> _____ <i>Other documentation</i> _____

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Reference	Section C - Legal Compliance	FORMAT	Completed?			Notes
			YES	NO	N/A	
LAG Section C Chap. 12	a. Were the following state statutes adhered to? <input type="checkbox"/> ORS 279A (federal law prevails in a conflict) <input type="checkbox"/> ORS 279C110 (qualification based selection for A&E)	On file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	OPO must participate in the test project reviews and review these requirements, prior to the local agency transitioning into full Certification unless otherwise approved by ODOT.
LAG Section C Chap. 12	b. Were the following federal requirements adhered to? <input type="checkbox"/> 23 USC 112(b)(2) Contracting for engineering and design services. <input type="checkbox"/> 23 CFR Part 172 Contracting for engineering and design services <input type="checkbox"/> 49 CFR Part 18.36 (federal procurement provisions) <input type="checkbox"/> 49 CFR Part 18.22 (allowable costs) <input type="checkbox"/> 48 CFR Part 31 (contract cost principles and procedures) <input type="checkbox"/> OMB Circular A-87 (Cost Principles for State, Local, & Indian Tribal Governments)	On file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	OPO must participate in the test project reviews and review these requirements, prior to the local agency transitioning into full Certification unless otherwise approved by ODOT.

Reference	Section D - Advertising & Award	FORMAT	Completed?			Notes
			YES	NO	N/A	
LAG Section C Chap. 12	a. Was project advertised per ODOT’s recommended practices (described below)? <ul style="list-style-type: none"> <input type="checkbox"/> In major newspaper of general circulation or technical publication of widespread circulation for 14 days or more? and <input type="checkbox"/> To qualified organizations, professional societies and DBE organizations? Or <input type="checkbox"/> Other (describe) 	On file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
LAG Section C Chap. 12	b. Did the advertisement contain the following required items? <ul style="list-style-type: none"> <input type="checkbox"/> Project title, estimated project cost and estimated start/end dates <input type="checkbox"/> General scope and nature of project work <input type="checkbox"/> Local agency contact for questions <input type="checkbox"/> Detail regarding how qualifications will be evaluated <input type="checkbox"/> For non-engineering services, estimates of hours and classifications needed to complete project <input type="checkbox"/> Multi-phase language, if appropriate <input type="checkbox"/> EEO requirement language <input type="checkbox"/> ADA requirement language <input type="checkbox"/> Civil Rights requirement language <input type="checkbox"/> Response due date <input type="checkbox"/> Publication dates 	On file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	OPO must participate in the test project reviews and review these requirements, prior to the local agency transitioning into full Certification unless otherwise approved by ODOT.
LAG Section C Chap. 12	c. Was a written protest procedure included? <i>Length of protest period?</i> _____	On file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	During the test project phase local agencies must coordinate with ODOT Procurement staff for the milestones listed in c-e.
LAG Section C Chap. 12	d. Did the Certified Local Agency use a Pass/Fail process for initial screening of the proposals?	On file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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LAG Section C Chap. 12	e. Were the proposals scored and ranked independently by each evaluator?	On file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
LAG Section C Chap. 12	f. Were the proposers provided seven days in which to submit a written protest to the consultant selection? the	On file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	The local agency must submit any protests they receive on test project solicitations to the LAL who will forward it to OPO for review.
LAG Section C Chap. 12	g. Was the contract awarded? <i>Date of award:</i> _____	On file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Reference	Section E - Records Retention	FORMAT	Completed?			Notes
			YES	NO	N/A	
LAG Section C Chap. 12	a. Was long term retention of contract documents, per OAR 166-200-0050(8) and ORS 12.135(3) completed?	On file	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	