A&E and Related Services
Consultant Selection
Certification
Certification Program Mission

To streamline the Local Public Agency (LPA) delivery process of Federal Highway Administration (FHWA) projects by certifying highly qualified LPA's that provide quality control that ensures FHWA requirements are met to deliver projects in a cost effective, timely manner through the collaboration of Oregon Department of Transportation (ODOT), FHWA and LPA partners.
Becoming Certified In Consultant Selection

• 2 Certifications
  ▪ Direct Appointment Certification
  ▪ Informal / Formal Certification

• Basic Process
  ▪ Agreement
  ▪ Application
  ▪ Agency determination of eligibility (for federal projects)
  ▪ Perform demonstration project
  ▪ Agency evaluation of demonstration project
  ▪ Amend Agreement
Becoming Certified In Consultant Selection

(Continued)

• **Education requirements:**
  - 0 months to 3 Years Public Procurement experience; **AND**
    - Based on Certification Process
  - PROC 301: Statement of Work for Personal Services Contracts;
  - PROC 302: Contract Administration for Personal Services Contracts; and
  - PROC 304: Preparing to Negotiate A&E and Related Services Contracts; **OR**
  - DAS equivalent classes; **OR**
  - Current certification in public procurement.
    - CPPB, CPPO, OPBC issued from NIGP, NASPO or DAS
Becoming Certified In Consultant Selection

(Continued)

- Qualified Staff with experience to:
  - Prepare and review SOW;
  - Prepare internal estimates, conduct cost analysis and negotiate contract/amendment costs;
  - Perform contract administration duties to ensure all obligations between LPA and Contractor are fulfilled; and
  - Prepare and process Formal RFPs.
Becoming Certified In Consultant Selection
(Continued)

• Qualified Staff:
  ▪ Must watch the Federal Aid Essentials for Local Public Agencies Consultant Services Overview, Hiring a Consultant Using Competitive Negotiation Procedures and Organizational and Consultant Conflicts of Interest videos online.
  ▪ Must attend ODOT or DAS classes to meet the minimum requirements.
Becoming Certified In Consultant Selection
(Continued)

• Required use of ODOT RFP & Contract templates
  o [http://www.oregon.gov/ODOT/CS/OPO/Pages/ae.aspx#Local_Public_Agency_%28LPA%29_Resources_for_Consultant_Selection](http://www.oregon.gov/ODOT/CS/OPO/Pages/ae.aspx#Local_Public_Agency_%28LPA%29_Resources_for_Consultant_Selection)

• Local rules vs. OAR’s.

• Written procedures:
  ▪ ODOT Request you adopt OAR 137-046/ 137-048 (DOJ Model Rules).
  ▪ Exceptions:
    o Case by Case basis.
    o Required at the time of application.
    o Can extend the application process.
  ▪ Qualified staff agree to follow ODOT’s Statement of Work Writing Guide.
Direct Appoint Certification

- Direct Appoint Process requires:
  - 1 demonstration project that will not exceed LPA threshold or $100,000.00.
  - Kick-off Meeting prior to completing draft contract.
  - Presentation / Evaluation Required prior to sending executed contract to Consultant.
  - ODOT finds LPA compliant and recommends certification in selection Process.
  - ODOT finds LPA not compliant and LPA has 30 days to submit a corrective action plan.
Informal Certification

- Informal process requires:
  - 1 demonstration project that will not exceed $150,000 or LPA threshold.
  - Kick-off Meeting prior to soliciting the project (optional).
  - Obtain ODOT approval of the RFP, SOW or Scope of Work & 3 prospective consultants.
  - Send Final draft contract, BOC, P/F Worksheet for OPO review.
  - ODOT finds LPA compliant and recommends certification in selection process.
  - ODOT finds LPA not compliant and LPA has 30 days to submit a corrective action plan.
Formal Certification

• **Formal process requires:**
  - 1 demonstration project at the appropriate LPA threshold.
  - Kick-off Meeting prior to soliciting the project.
  - Obtain ODOT approval of the RFP, SOW or Scope of Work.
  - Public Advertisement.
  - Presentation / Evaluation Required prior to sending executed contract to Consultant.
  - ODOT finds LPA compliant and recommends certification in selection process.
  - ODOT finds LPA not compliant and LPA has 30 days to submit a corrective action plan.
  - Formal certification will meet both informal and formal certification requirements.
Trending

• **Application Hang-up’s**
  - Identifying qualified staff.
  - Submission of organizational chart.
  - ODOT /DAS training.

• **RFP glitches**
  - Scope of Work vs. Statement of Work.
  - Draft Contract.
  - Use of Local preferences.
  - Requesting DBE Goal.
Trending
(Continued)

• Updated guidance / processes
  ▪ One document, draft format.
  ▪ Demonstration Projects.
  ▪ Contract Administration.

• Tools
  ▪ Use of RFP timelines (Formal – Optional)
  ▪ Certification Website.
    ○ LAG Manual
    ○ Consultant Selection
    ○ Certification Training
    ○ Statewide Programs Unit Certification Program
Statewide Programs Unit – Certification Program Office

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QUESTIONS ???