**Application:** This template is used when the Certified LPA owns the Contract on a federal funded project.

**Version Date: 3/24/22**

**GENERAL INSTRUCTIONS:**

* Yellow highlighted areas include instructions that should be deleted prior to release.
* Blue highlighted areas indicate text or fields that need information provided or revised.
* “Agency” means the Certified LPA as defined in the CLPA Contract.
* **Delete instructions throughout the document before executing Contract or amendment. Deletions can be automated as follows:**
  + From the “Edit” menu (or “Editing” menu on the “Home” ribbon) select “Replace”;
  + With cursor in the “Find what” field, click “More” button, then “Format”, then “Font”, then in the font field select “Times New Roman” text;
  + Leave the “Replace with” field blank;
  + Click “Replace All”. This will delete all yellow highlighted text.

**PROJECT-SPECFIC INSTRUCTIONS:**

* The template language must be revised if needed for specifics applicable to the current project (including deletion of requirements that don’t apply to the current project).
* Not all subtasks are needed for each project.  If an entire subtask is not needed, leave the task number, add “RESERVED” after the subtask title, and delete all subtask text.

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# TASK 1 – PROJECT MANAGEMENT

Consultant shall provide management and coordination of Services under this SOW for delivery of Tasks and Deliverables according to the agreed upon delivery schedule.

**1.1 Administration & Record Keeping**

Consultant shall:

* [If Consultant has QA/QC plan on file with ODOT, have consultant submit a copy to the Certified LPA with any modifications in track changes. Email LAL to request approved QA/QC plan if one is available in [**ODOT’s internal QA/QC Plan share folder**](file://scdata2/ADU_Regions_share/QAQC_Plans_A&E)**.**] Prepare or Submit a Quality Assurance/Quality Control (“QA/QC”) Plan for Agency review and approval. The QA/QC Plan must be developed consistent with requirements of ODOT’s “Guidance/Template for Consultants” available online at: [**http://www.oregon.gov/ODOT/HWY/OPL/docs/SEOPL/Consultant\_Quality\_Plan\_Model.doc**](http://www.oregon.gov/ODOT/HWY/OPL/docs/SEOPL/Consultant_Quality_Plan_Model.doc);

----Local Agency should direct Consultant to Agency specific requirements, if any, in this space----

* Prepare a Project design schedule using the Critical Path Method, prepared with MS Project software or approved equal. The Project schedule must include, but is not limited to: all major authorized tasks as agreed upon by the Parties, Project design team meetings, and milestones (type and date) specified in this SOW and required to complete all Services under this Contract. Consultant shall update the Project schedule during the Project if milestone or deliverable due dates are modified. For budgeting purposes, it is assumed that up to (#) Project schedule updates will be necessary;
* [Invoice Preparation -  shall not be listed as a task and/or deliverable (and shall not include costs in BOC) unless ODOT has on file a signed [Certification of Invoicing and ODC Billing Practices](http://www.oregon.gov/ODOT/CS/OPO/docs/aepage/InvODCcert.doc) from the Consultant that indicates invoice preparation is charged to each project and is not included in the firm’s overhead. To determine firms approved for invoice prep charges, send a request to: [ODOTBillingRateUpdates@ODOT.state.or.us](mailto:ODOTBillingRateUpdates@ODOT.state.or.us) (include name of firm and request copy of signed certification of invoicing form. The invoice limitation does not apply to project status reports, which are a required deliverable to be submitted with monthly invoices.] Prepare invoices and progress reports according to the requirements set forth in the Compensation Exhibit of the Contract. Each progress report must:
  + Include a summary of previous period’s activities and the planned activities for the upcoming period;
  + Identify percentage completed of each Task/Deliverable;
  + Reconcile the budget with the actual amount billed to date;
  + Identify unresolved issues and concerns that may affect the SOW, schedule and/or budget for Services.

For budgeting purposes, it is assumed that up to (#) progress reports will be necessary

* Develop and maintain a Project file to include survey and engineering computations, assumptions, meeting agendas and minutes, working drawings, quality control and review documentation, correspondence, and memoranda. (See Contract Terms & Conditions, Records Maintenance; Access)

**1.1 Consultant Deliverables and Schedule**

Consultant shall provide:

* QA/QC plan submitted electronically to APM within 7 calendar days of Notice to Proceed (“NTP”).
  + Project Draft Design Schedule submitted within 7 calendar days of NTP. Submit an electronic file (MS Project or list other approved software) format to the APM.
  + Updated Project Design Schedule, as necessary, via timeline agreed to by APM, an electronic file (MS Project or list other approved software) format to the APM.
  + Progress reports and invoices submitted electronically to APM no later than the 20th calendar day of the month following the reporting period.

**1.2 Coordination**

Consultant shall:

* Coordinate with the APM as the main point of contact for coordination and management of Consultant Services under the Contract;
* Contact other Agency staff and regulatory agency staff, if necessary throughout the Contract, to gather any additional information needed for the Project, Project site, regulations and guidance;
* Provide overall management, direction and coordination of staff (including sub-consultants, if any) to include any necessary internal Consultant staff meetings;
* [Delete this bullet if regular updates are not desired or necessary] Contact APM via telephone or other agreed upon communication means on a weekly basis to provide Project status information

**1.2 Consultant Deliverables and Schedule**

Consultant shall provide:

* On-going coordination and communication as needed to appropriately manage the Services under this Contract (no tangible deliverables for this task).
* Meeting minutes and phone memoranda as agreed with the APM.

**1.3 Project Meetings**

1.3.1 Project Kickoff Meeting

Consultant shall organize, conduct, prepare for and attend a ## hour Project kickoff meeting. The Project kickoff meeting will be held at \_\_\_\_\_\_\_ or virtually with Agency, Consultant’s PM and other necessary Consultant staff in attendance. Consultant shall prepare the meeting agenda with input from the Agency. The purpose of the Project kickoff meeting is to review Project issues such as SOW; work products and deliverables; schedules; budgets; right of way; utility coordination/design; design criteria; guidance documents; standards and quality control. Consultant shall schedule Project kickoff meeting within 10 business days of Notice to Proceed (NTP). Consultant shall prepare draft meeting minutes for review by Agency. For budgeting purposes, it is assumed that up to (#) Consultant staff shall attend the (#) hour Project kickoff meeting.

1.3.2 Project Development Team Meetings

Consultant shall organize, conduct, prepare for and attend up to (#) Project Development Team (“PDT”) Meetings; (#) via telephone and (#) in-person or virtually. Each in-person PDT meeting will be held at \_\_\_\_\_\_ or virtually with Agency, Consultant’s PM and other necessary Consultant staff in attendance. Consultant shall prepare the meeting agenda with input from the Agency. Consultant shall prepare draft and final meeting minutes to be distributed to Agency and all other meeting participants. For budgeting purposes, it is assumed that up to (#) Consultant staff shall attend each in-person PDT meeting.

[Include specific Discipline Meetings within those specific tasks, where needed]

**1.3 Consultant Deliverables and Schedule**

For each meeting, Consultant shall provide:

* + - Meeting agenda submitted electronically to APM and all other meeting participants # business days prior to meeting.
    - [Delete this bullet if draft meeting minutes are not necessary] Draft meeting minutes submitted electronically to APM and all other meeting participants within 2 business days of meeting.
    - [Delete “final” if draft meeting minutes were deleted] Final meeting minutes submitted electronically to APM and all other meeting participants within 7 business days of meeting.