



Process Improvement & Training Subcommittee

Subcommittee Co-Chairs:

Hanne Eastwood, ODOT

Liz Tillstrom, PBOT



Discussion 1: Consultant Contracting website (20 minutes)

- ▶ Question 1: Do you agree moving the consultant selection and contract administration resources from the ODOT Procurement site to within the ODOT Local Government site makes sense? Why or why not?
- ▶ Question 2: What do you like about the proposed reorganization? What is confusing about the proposed reorganization? Include any specific comments about table organization and sorting.
- ▶ Question 3: Do you have other suggestions for how to improve the usability of the consultant contracting resources on the ODOT website?



Local Government

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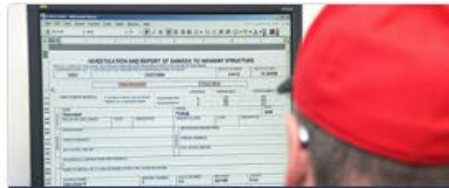


Funding Programs

[Local Government Funding Overview](#)

[STIP](#)

[Connect Oregon](#)



Guidance

[Local Agency Guidelines Manual](#)

[Governance](#)

[Forms Library](#)

[Keep Oregon Moving \(HB 2017\)](#)

[Certified Local Agency Resources for Consultant Selection](#)



Certification

[About the Program](#)

[Certification Guidance & Forms](#)

[Local Agency Certification Status](#)

[Certified LPA Review Schedule](#)



Engagement

[Committees & Contacts](#)

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[Training Opportunities](#)

<https://www.oregon.gov/odot/localgov/pages/index.aspx>

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Certified Local Agency Resources for Consultant Selection

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**HIGHWAY & BRIDGE
CONSTRUCTION**

Letting Schedules

Notice to Contractors

Bid and Award Information

Forms, Tips and Resources

Letter of Assent

**SERVICES, GOODS AND
RESOURCES**

Consultant Forms & Resources

This page includes templates, forms and guidance documents for certified local agencies conducting federally-funded consultant selection under the Oregon Department of Transportation's local agency certification program.

The process, application, forms and guidance for local agencies to become certified in architectural and engineering consultant selection (or construction contracting) are available on the [Local Government, Certification Guidance and Forms page](#).

NOTE: If any forms or documents linked on this page will not open, right-click on the link and select "Save link as" to download the file.

Guidance Documents, Requirements & Resources



Required Templates & Forms for LPA Use



Forms Completed by Consultant for Local Agency Procurements



ODOT's Approved Consultant Lists for Local Agencies (Direct Appointments/Informal Solicitations)



and Training Center

For questions regarding Local Agency forms or templates, please email: ODOTemplateRequests@odot.oregon.gov



Statement of Work Library

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SERVICES, GOODS AND RESOURCES

This page includes statement of work resources and templates primarily for Architectural and Engineering and related services for Oregon Department of Transportation and local public agency projects.

Use only the latest version of each statement of work template linked below because versions stored in project files or email attachments may not be current.

Unless stated otherwise in a specific statement of work template, contracts using statement of work templates are subject to standard legal sufficiency review requirements.

NOTE: If any forms or documents linked on this page will not open, right-click on the link and select "Save link as" to download the file.

[Statement of Work Writing Guides & Resources](#)



[Standardized Preliminary Engineering and Design Task Templates for ODOT Projects](#)



[Task Language Templates for Certified Local Agency Projects](#)





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Consultant Contracting

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Guidance

[A&E Consultant Selection](#)

[Non-A&E Planning/Personal Services](#)

[LAG Manual](#)

[Consultant Selection Training/Qualifications](#)



Statement of Work Resources

[Statement of Work Library](#)

[Writing Guide for A&E Personal Services](#)

[Writing Guide for Personal Services](#)

[Review Process Automation](#)

[ODOT Standardization Tool](#)



Approved Consultant Lists

[Firms with ODOT Price Agreements](#)

[Endangered Species Act Qualified Firms](#)

[Qualified Right of Way Appraisers](#)

[Certified Construction Inspectors](#)

[Qualified Cultural Resource Consultants](#)



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Templates and Forms

Document Name	Required for ODOT	Procurement Type	Predominant Services Type	Topic	Who Completes
	Yes	Informal/Formal	A&E	Solicitation Documents & Resources	CLPA
RFP for Non-A&E Planning Services	Yes	Intermediate/Formal	Non-A&E	Solicitation Documents & Resources	CLPA
DBE Goal Calculation Worksheet	Yes, if requesting non-standard goal	Informal/Formal	Both	Solicitation Documents & Resources	CLPA
Consultant List Exception Request	Yes, if selecting consultant not on ODOT approved list	Small Purchase Plus	?	Solicitation Documents & Resources	CLPA
Conflict of Interest Disclosure Form	Yes	All	Both	Solicitation Documents & Resources	Consultant
Subcontractor Solicitation and Utilization Report # 734-2721	Yes	All	?	Solicitation Documents & Resources	Consultant
Contract for A&E Services and Non-A&E Planning Services	Yes	All	Both	Sample Contract & Statement of Work	CLPA
A&E Statement of Work Writing	Yes	Small Purchase	A&E	Sample Contract	CLPA



Discussion 1 Responses: Consultant Contracting website

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Discussion 2: RFP & Contract Template Usability (20 minutes)

- ▶ Question 1: Template instructions: Do you prefer to:
 - Keep the current instruction format (primarily in line with the section the instruction relates to)
 - Include all the instructions at the top (with a reference to the section the instruction applies to)
 - A separate instruction document
 - Use MS Styles to delete all instructions at once
- ▶ Question 2: What is the top issue or time driver you experience when using templates to assemble your RFPs and contracts?
- ▶ Question 3: Do you have other suggestions for ways to improve the functionality of the RFP and contract templates?

and contractual obligations, no completion or delivery of a project on schedule, and no timely payment to employees and workers or any other criteria as determined by Agency.

3.5 METHOD OF AWARD

[Indicate how final scores and selection will be determined.]

The scores for Proposer ranking and tentative award will be determined as follows:

- Total Proposal Score = Total of all evaluator scores for a given Proposal, divided by the number of evaluators.
- Total Interview or Follow-up Questions Score (if conducted) = Total of all evaluator scores for a given Proposer, divided by the number of evaluators.
- **Final Score** = Total Proposal Score plus Total Interview or Follow-up Questions Score (if conducted).

3.6 RESPONSIBILITY DETERMINATION

At any time prior to Contract execution, Agency may rescind the intent to award notice, if applicable, and reject any Proposer found to be not responsible.

3.7 INTENT TO AWARD NOTICE

If an apparent successful Proposer is selected, Agency will issue an intent to award notice on the eProcurement System specified in RFP section 0.0 [or] and will provide a copy of the notice to all Proposers. Award to the apparent successful Proposer is subject to successful negotiation of the Contract.

3.8 PROTEST of CONSULTANT SELECTION

LPA TEMPLATE for FHWA-FUNDED CONTRACTS

This template is required for FHWA-funded LPA A&E and non-A&E contracts. Regardless of the procurement rules and procedures adopted by an LPA, for federal aid A&E contracts ODOT requires the LPA to meet, at minimum, the solicitation document, contract document and procedural requirements set forth or referenced in the following hyperlinked document: [LPA A&E Requirements Guide](#).

INSTRUCTIONS

- **Yellow highlighted areas** include instructions that are deleted prior to signing.
- **Green highlight** indicates instructions specific to non-A&E planning services.
- **Blue highlight** indicates areas that need revisions or text that may be optional. Optional language may be included if it applies or deleted if it does not. Changes to provisions that are not highlighted in blue, or deletions of provisions not labeled as “optional” or “delete if not applicable” must be approved by ODOT’s Procurement Office.
- **Gray highlight** indicates fields that need to be filled in.
- **Use Track Changes** when editing template. Save electronic copy of draft in procurement file that shows Track Changes of all edits to template.
- **Section & Exhibit number formatting.** If there are sections or subsections labeled as “optional” that are not applicable to a particular Contract, delete the provisions of the section or subsection but leave the section/subsection heading (and the number/letter formatting assigned to the heading) and enter “RESERVED” following the heading.
- **Macros: Turn on Track Changes before running any of the macros** so you can quickly review which provisions or instructions have been deleted or added by the macro.

Delete Instructions



Discussion 2 Responses: RFP & Contract Template Usability

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Optional Discussion 3: Training Priorities

- ▶ Question 1: What are the top 3 topics related to consultant contracting that you would like additional training on?
- ▶ Question 2: Do you prefer training delivered:
 - ▶ Live, at a CUG event (note: would be offered once, possibly repeated every few years)
 - ▶ Virtual, live
 - ▶ Virtual, on demand



Existing Training

- ▶ Federal-aid Essentials Training videos
 - ▶ Consultant Services Overview
 - ▶ Hiring a Consultant Using Competitive Negotiation Procedures
 - ▶ Organizational and Consultant Conflicts of Interest
- ▶ Oregon Department of Administrative Services
 - ▶ Writing a Statement of Work (live webinar)
 - ▶ Contract Administration Training Certificate (on demand virtual)
 - ▶ Fundamentals of Procurement (\$25K-\$250K) (webinar or in person)
 - ▶ Principles of Public Procurement (>250K) (webinar or in person)
- ▶ ODOT
 - ▶ OPO on demand: Establishing Billing Rates with ODOT, Invoice Requirements, Consultant Contracting for A&E Contracts
 - ▶ CPO recordings: Overview, SOW Library, Billing Rates & BOC, Internal Cost Estimates, Negotiations, Invoice Reviews

Idea Generation

15 minutes



1. What issues is your agency experiencing in relation to consultant contracting?
2. What is your highest priority issue relating to consultant contracting procedures?



**Wrap up and
thank you!**