

**PROJECT DELIVERY ACADEMY**  
**MODULE 3: PROJECT MANAGER RESPONSIBILITIES AND**  
**MEETING ADDITIONAL FEDERAL REQUIREMENTS**

# **PROJECT DEVELOPMENT ON-CALL & TOAST APPLICATION**

**Presented by:**

**Brenda Contreras**

**Administrative Services Officer V**

**Project Resource Office**

## Project Development On-Call

- Process
- Project Framework Document
- ECS Checklist (New Revised)
- Stakeholder Meeting Agenda
- Invoicing
- Evaluations
- TOAST
- New Development On-Call

# Consultant Process

PROJECT DELIVERY ACADEMY  
MODULE 3: PROJECT MANAGER  
RESPONSIBILITIES AND  
MEETING ADDITIONAL  
FEDERAL REQUIREMENTS



DESIGN LEAD: **Consultant** PROJECT SCOPE/ SCHEDULE/ BUDGET  
 FRAMEWORK

PROJECT MANAGER: \_\_\_\_\_ TRACS: \_\_\_\_\_ DISTRICT: \_\_\_\_\_  
 RTE: \_\_\_\_\_ PROJECT NAME: \_\_\_\_\_ ADVERTISEMENT: QTR/FY \_\_\_\_\_  
 MILE POST BEGIN/END: \_\_\_\_\_ / \_\_\_\_\_ TIP ID: \_\_\_\_\_ FEDERAL ID: \_\_\_\_\_

FUNDING SOURCE:  HSIP  FED  STATE

IF LOCAL GOVERNMENT PROJECT, FILL IN BELOW

LOCAL PROJECT (CITY) <input type="checkbox"/> NO	CO-EMPD LOCAL GOV? <input type="checkbox"/> NO	JPA NUMBER: EXECUTED? <input type="checkbox"/> YES <input type="checkbox"/> NO	MATCH RECEIVED? <input type="checkbox"/> YES <input type="checkbox"/> NO
--	--	--	--

**KNOWN CRITICAL PATH ITEMS:**

ENVIRONMENTAL UTILITIES	<input type="checkbox"/> YES <input type="checkbox"/> NO	ROW	<input type="checkbox"/> YES <input type="checkbox"/> NO
	<input type="checkbox"/> YES <input type="checkbox"/> NO	DISTRICT SCOPE ITEMS	<input type="checkbox"/> YES <input type="checkbox"/> NO

\* Review scope and project limits with technical groups and District to identify potential concerns

SCOPE: \_\_\_\_\_ Scoping document completed (PA)?  YES  NO

**FUNDING VERIFICATION**

PROGRAM AMOUNT: DESIGN \$ \_\_\_\_\_ CONSTRUCTION \$ \_\_\_\_\_  
 IS FUNDING SUFFICIENT? :  YES  NO  
 (DESIGN+ADOT REVIEW/C&S) **PM HOUR ESTIMATE**  
 IF NO, ADDITIONAL FUNDS NEEDED \$ \_\_\_\_\_ CONSULTANT: \_\_\_\_\_ ADOT: \_\_\_\_\_

	RESPONSIBILITY				
	ADOT TECHNICAL LEAD	CONSULTANT	ADOT		N/A
			DESIGN	REVIEW	
SURVEY		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ENVIRONMENTAL		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
R.O.W		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UTILITY/RAILROAD		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PREDESIGN		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ROADWAY DESIGN		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PAVEMENT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GEOTECH		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TRAFFIC DESIGN		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DRAINAGE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BRIDGE		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ROADWAY REVIEW		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ROADSIDE DEVELOPMENT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DISTRICT		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



ARIZONA DEPARTMENT OF TRANSPORTATION – ENGINEERING CONSULTANTS SECTION  
Contract Modification Checklist

Contract Number \_\_\_\_\_ Consultant Name \_\_\_\_\_  
 Contract Description \_\_\_\_\_  
 Project Name \_\_\_\_\_ Modification Amount \_\_\_\_\_  
 ADOT Project No. (TRACS) \_\_\_\_\_ Modification Number \_\_\_\_\_ Task Order/Rev Number \_\_\_\_\_ Contract DBE Goal \_\_\_\_\_  
 ADOT Project Manager \_\_\_\_\_ ADOT Contract Manager \_\_\_\_\_

This checklist is to be completed and submitted by the Prime Consultant along with each Contract Modification submittal. Please check the appropriate boxes designating documentation included in each submittal for the Prime Consultant, Subconsultant and Tier-Subconsultant.

Prime	Subs	Tier-Subs	Contract Modification Required Documents	ECS Review	
				Complies	Y/N
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Transmittal Letter on Consultant Letterhead, signed and dated	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Scope of Work Narrative	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cost Proposal Cost Derivation Sheet, Signed and Dated <i>(All costs must be consistent with the contract)</i>	<input type="checkbox"/>	<input type="checkbox"/>
			Cost Proposal Cost Derivation Sheet must contain the following:		
			• Approved Labor Classifications	<input type="checkbox"/>	<input type="checkbox"/>
			• Approved Rates, Hours, Overhead Rates	<input type="checkbox"/>	<input type="checkbox"/>
			• List of Other Direct Costs	<input type="checkbox"/>	<input type="checkbox"/>
			• List of Subconsultant and Vendor Costs	<input type="checkbox"/>	<input type="checkbox"/>
			Are New Labor Classifications proposed? <input type="checkbox"/> No <input type="checkbox"/> Yes: Submit Certified Payroll	<input type="checkbox"/>	<input type="checkbox"/>
			Are New Subconsultants proposed? <input type="checkbox"/> No <input type="checkbox"/> Yes: Submit Add/Remove Sub-consultant Form	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Direct Expense Cost Derivation	<input type="checkbox"/>	<input type="checkbox"/>
			• Detailed list of Approved Direct Expenses with unit, rate and total	<input type="checkbox"/>	<input type="checkbox"/>
			• Vendor quotes required for all externally generated Direct Expenses <i>(Lump sum quotes for Direct Expenses are not acceptable)</i>	<input type="checkbox"/>	<input type="checkbox"/>
			Are New Direct Expense Items/rates proposed? <input type="checkbox"/> No <input type="checkbox"/> Yes – Submit Vendor Quote	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Post Design Services (PDS) Scope of Work	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/> Using previously established PDS Rates?	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/> Proposing new or establishing PDS Rates? – Submit Certified Payroll	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	DBE Documentation	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/> Intended Participation Affidavit – Consultant*, signed and dated	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/> Intended Participation Affidavit – Subconsultant, signed and dated	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/> Consultant Certification of Good Faith Efforts*, signed and dated <i>* If the affidavit does not meet the DBE Goal, a GFE is also required.</i>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other (describe): _____	<input type="checkbox"/>	<input type="checkbox"/>

ADOT Project Manager Contract Modification Submittal Checklist

ADOT Project Manager and Contract Manager have reviewed and recommend the attached Contract Modification Package and certify that the scope of work is consistent with the contract and authorize ECS to execute the Modification.

- Consultant Initiation Date: \_\_\_\_\_
- ADOT Project Manager Review and Concurrence Date: \_\_\_\_\_ PM Initials: \_\_\_\_\_ CM Initials: \_\_\_\_\_
- Check boxes are to be marked to designate documentation included in PM submittal along with the above noted items from the consultant.
- Include Project Manager Scope of Work, Schedule, Hour and Contract Estimate 

Funding Source Approval – Check Appropriate Box(es) for type and attach documents 

FHWA: Include Signed FARA form or FHWA email (include current available budget documentation) 

IPA: Executed IPA (include current available budget documentation) 

State: Signed RARF or Non-Federal form (include current available budget documentation) 

Other: Funding Approval Documentation (include current available budget documentation) 

Funding Authorization is pending or sufficient funds are not available. 

Anticipated authorization/funding availability date: \_\_\_\_\_ 

If Post Design Services, attach: 

Resident Engineer's Email & FAST 123 Financial Card or Recap Sheet 

If Task Order Waiver is required, attach the completed and signed document 

If an ANTP or LNTP was executed, attach a copy of the completed and signed documentation

ADOT Engineering Consultant Section Review Checklist

- ECS Initial Review Date Received: \_\_\_\_\_ Date Reviewed: \_\_\_\_\_ ECS Initials: \_\_\_\_\_
- Final Application Date Received: \_\_\_\_\_ Date Reviewed: \_\_\_\_\_ Simple 14 Date: \_\_\_\_\_ ECS Initials: \_\_\_\_\_ Rev. 6/15/17
- FHWA Authorization Date: \_\_\_\_\_ AFIS Date: \_\_\_\_\_



PROJECT DEVELOPMENT ON-CALL  
[TASK NAME]  
[LOCATION]

Initial Scoping Meeting

Meeting Date:

Location:

Call-In Number:

Conference Code:

Attendees:

1. Scope of Work

XX Minutes

1. Overview by ADOT Project Manager
2. Special Issues and Concerns
3. Discussion by Discipline (*Revise to address the specific requirements of the Task Order*)
  - Scoping Document Development
  - AASHTO Design Criteria Report and Design Exceptions
  - Surveys and Mapping
  - Geotechnical Investigations and Design
  - Pavement Design
  - Environmental Clearance and/or Permitting
  - Public Involvement/Communication
  - Utility Coordination, Relocation and Level of Designation
  - Railroad Coordination and Permitting
  - Roadway Design
  - ADA Improvements (Feasibility Report & Design)
  - Drainage and Hydraulic Design
  - Landscape Architecture Design
  - SWPPP Design
  - Structure Design
  - Traffic Studies
  - Signals, Lighting and ITS Design
  - Signing & Pavement Marking Design
  - Constructability/Maintenance of Traffic Design
  - Right-of-Way
  - Other
4. Design Standards (*if LPA project*)
5. Anticipated Project Meetings

## Project Development On-Call Invoicing

- PM Receives Invoice Concurrently
- Please Review and Concur Timely
- Let me Know if There are Issues
- Prompt Pay Law (21 Calendar Days)



## Project Development On-Call Evaluations

- Please Respond Timely (14 Days)
- Annual and Final
- Take it Seriously





## Task Order Assignment Schedule Tracker (TOAST)

- Make and Manage Assignments
- Schedule Tracking
- Reporting



# TASK ORDER ASSIGNMENT SCHEDULE TRACKER

C6826

[Home](#)

[About](#)

## WELCOME BRENDA CONTRERAS

What would you like to do:

[Make New Assignment](#)

[Manage Existing Assignment](#)

[Reports Page](#)

Your Dashboard Items:

### TO DO LIST:

Coming soon...

### YOUR CURRENT TOAST INFO:

Coming soon...

## TASK ORDER ASSIGNMENT SCHEDULE TRACKER F1405

[Home](#)
[About](#)

Select from the list below: *(Displaying All)*

 Filter by:

	TRACS	Project Name	Contract#	Consultant	Project Manager	Estimated Amount	Assigned On	NTP Date	Duration
<a href="#">Select</a>	F006101D	TRUWOOD DR - FAIN RD	2014-006.02	AMEC Foster Wheeler Environment & Infrastructure I	VIVIAN LI	\$217	05/27/2016	7/13/2016	47
<a href="#">Select</a>	SZ10601C	55TH AVENUE, RIVIERA DR - CACTUS RD	2014-006.02	AMEC Foster Wheeler Environment & Infrastructure I	LARRY DOESCHER	\$25	07/19/2016	9/30/2016	73
<a href="#">Select</a>	H879101C	SOUTH OLD TIGER ROAD - MIGUEL ROAD	2014-006.02	AMEC Foster Wheeler Environment & Infrastructure I	TRICIA BROWN	\$45	10/28/2016	11/23/2016	26
<a href="#">Select</a>	SH62701C	SIGN MANAGEMENT SYSTEM/SIGN UPGRADE, AVONDALE	2014-006.02	AMEC Foster Wheeler Environment & Infrastructure I	DAVID WOSTENBERG	\$40	12/05/2016	3/3/2017	88
<a href="#">Select</a>	SH63401C	SIGN MANAGEMENT SYSTEM/SIGN UPGRADE, BUCKEYE	2014-006.02	AMEC Foster Wheeler Environment & Infrastructure I	DAVID WOSTENBERG	\$40	12/05/2016	3/3/2017	88
<a href="#">Select</a>	SH60301C	QUARTZSITE-VARIOUS LOCATIONS	2014-006.02	AMEC Foster Wheeler Environment & Infrastructure I	GREGORY JOHNSON	\$30	03/14/2017	4/21/2017	38
<a href="#">Select</a>	T009501C	PIERCE FERRY RD. - LLOYD ST. TO IRONWOOD DR.	2014-006.02	AMEC Foster Wheeler Environment & Infrastructure I	GREGORY JOHNSON	\$150	03/27/2017	5/5/2017	39
<a href="#">Select</a>	F001301C	LAKE PLEASANT RD - I-17	2014-006.02	AMEC Foster Wheeler Environment & Infrastructure I	MOHAMMAD A. ZAID	\$250	03/29/2017	5/1/2017	33
<a href="#">Select</a>	T009401C	COLORADO CITY - JOHNSON AVE- CENTRAL ST- AZ AVE	2014-006.02	AMEC Foster Wheeler Environment & Infrastructure I	KIRSTIN TVEDTEN	\$50	04/27/2017	6/9/2017	43
<a href="#">Select</a>	T013601C	ELWOOD ST-COTTON LN- ESTRELLA PWKY-ELLIOT RD	2014-006.02	AMEC Foster Wheeler Environment & Infrastructure I	KIRSTIN TVEDTEN	\$50	07/11/2017	8/21/2017	41
<a href="#">Select</a>	F002901C	SR-95 AT KIOWA BLVD	2014-006.03	Aztec Engineering Group, Inc.	BHARAT KANDEL	\$201	06/30/2016	8/18/2016	49
<a href="#">Select</a>	F005301C	CLOVER CREEK	2014-006.03	Aztec Engineering Group, Inc.	VIVIAN LI	\$30	08/08/2016	9/20/2016	43
<a href="#">Select</a>	T002701C	ZORILLA STREET BRIDGE, CLIFTON	2014-006.03	Aztec Engineering Group, Inc.	JEFFREY DAVIDSON	\$180	08/22/2016	10/6/2016	45

← → https://primaweb/TOAST/ManageSchedule... primaweb rptMetrixAll - Report Viewer

Welcome to CGI Advanta... Suggested Sites Welcome to CGI Advanta...

## TASK ORDER ASSIGNMENT SCHEDULE TRACKER F1405

Home About

Current Project Info:

Route:	Co:	MP:	TRACS:	Const. Budget:	FY:	District:	Federal Id:	Length:
0000	MO	MMO	T009501C	\$1723	20	Northwest	MMO-0(217)T	0.0
Project Name:					Type of Work:			
PIERCE FERRY RD. - LLOYD ST. TO IRONWOOD DR.					ROADWAY WIDENING & INTERSECTION IMPROVEMENTS			
Project Manager:					ECS Specialist:			
GREGORY JOHNSON @ 602-712-7774					ANNETTE PEREZ @ 602-712-4171			
Consultant:					Schedule as of day:			
AMEC Foster Wheeler Environment & Infrastructure I					<b>NTP on: 5/5/2017 1</b>			

Current Assignment Schedule:

	Step Id	Step Name	Ideal Duration	Ideal Finish	Actual Finish	Actual Duration
<a href="#">Select</a>	10	Selection of Consultant	0	3/27/2017	3/27/2017	0
<a href="#">Select</a>	20	Stakeholder Kick-Off Meeting	10	4/6/2017	3/30/2017	3
<a href="#">Select</a>	30	Development and Submittal of First Cost Proposal	7	4/13/2017	4/13/2017	14
<a href="#">Select</a>	40	ADOT Review and Comments of First Cost Proposal	5	4/18/2017	4/18/2017	5
<a href="#">Select</a>	50	Final Negotiation and Final Cost Proposal from Consultant	7	4/25/2017	4/25/2017	7
<a href="#">Select</a>	60	PMG Review, Compilation of Task Order Modification, Signatures & Submittal to ECS	5	4/30/2017	4/28/2017	3
<a href="#">Select</a>	70	ECS Complete and Accurate Review (Simple 14 Determination)	2	5/2/2017	5/1/2017	3
<a href="#">Select</a>	80	Task Order Modification Finalize, Encumber, Sign and Notice to Proceed	14	5/16/2017	5/5/2017	4
<b>Totals</b>			<b>50</b>			<b>39</b>

[Back to List](#)  
[Launch Tracking Report](#)  
[Launch Tracking Report - With Comments](#)

## New Development On-Call Contract

- 20 Consultants
- QBS – Qualifications Based Selection
- New DBE Goal – 11.78% vs. 11.13%



## PROJECT DEVELOPMENT ON-CALL & TOAST APPLICATION

Questions?



**PROJECT DELIVERY ACADEMY**  
**MODULE 3: PROJECT MANAGER RESPONSIBILITIES AND**  
**MEETING ADDITIONAL FEDERAL REQUIREMENTS**

**THANK YOU**