



# **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



PROJECT DEFINITION DOCUMENT														
OVERVIEW & LOCATION INFORMATION														
PROJECT NO:		Planning Project Manager:		Development Project Manager:		Design Manager:								
PROJECT NAME:							Scoping By:							
TYPE OF PROJECT/WORK:							Designed By:							
ROUTE:		MILEPOST LIMITS:		DISTRICT:		County:								
Terrain:		Avg. Elevation:		Posted Speed:		Design Speed:								
Federal Highway Approval Required:		FEDERAL ID:		Alt. Modal Considerations:		On NHS:								
FUNDING & SCHEDULE INFORMATION														
Funding Source(s):		AMOUNT PROGRAMMED		Design:		Year:		Construction:	Amount	Year				
FWHA-NHPP		SCOPING ESTIMATE		Design:				Construction:						
STATE		ADDITIONAL FUNDS NEEDED		Design:				Construction:						
OTHER:														
eSTIP ID:														
eSTIP SNIP:														
PRB Date:		PPAC Date:		STB Date:										
Scope Completed Date:		PS&E (Stage V) Date:		Bid Adv. Date:										
Scope Estimate:		Stage V Estimate:												
FOR LOCAL PROJECTS:														
Local Agency:							IPA No.:							
COG/MPO:							Local Match:							
Primary Objective of the Project														
Baseline Need(s)														
Project Scope Statements														
Targeted Performance Measurement(s)														
Potential Project Risks														
Basis of Design Documentation Completed														
ADA Compliance & Feasibility Report Required?														
Safety Analysis Required?														
Traffic Operational Analysis Required?														
Additional ROW/TCE Required?														
Environmental Doc. Type														
Design Exceptions and/or Variances Required?														
Scope Approval Verification														
Project Definition & Scope Approval Signatures				Kick-off Meeting										
Project Manager	Date:			Scope Change	Initials	Stage III	Scope Change	Initials	Stage IV	Scope Change	Initials	Stage V	Scope Change	Initials
Design Lead Group Manager	Date:													
ADOT District Administrator	Date:													
ADOT TSMO Operations	Date:													
ADOT TSMO Systems	Date:													
ADOT Environmental	Date:													
Record of Scope Changes (if any)														
Kick-Off Meeting	Scope Change:													
	Scope Change Impact:													
Stage III	Scope Change:													
	Scope Change Impact:													
Stage IV	Scope Change:													
	Scope Change Impact:													
Stage V	Scope Change:													
	Scope Change Impact:													

**Contract Modification Checklist**

Contract Number	_____		
Contract Description	_____		
Project Name	_____		
ADOT Project No.	Task Order _____	Rev Number _____	Modification Amount _____
ADOT Project/Task Manager	ADOT Contract Manager (Not ECS Staff) _____		
Consultant Contact Name	Consultant Email _____		
Consultant Signatory Name	_____		

**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
<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"/>	Scope of Work Narrative
<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>
			Cost Proposal Cost Derivation Sheet must contain the following:
			<ul style="list-style-type: none"> <li>• Approved Labor Classifications</li> <li>• Approved Rates, Hours, Overhead Rates</li> <li>• List of Other Direct Costs</li> <li>• List of Subconsultant and Vendor Costs</li> </ul>
			Are New Labor Classifications proposed? <input type="checkbox"/> No <input type="checkbox"/> Yes: Submit Certified Payroll
			Are New Subconsultants proposed? <input type="checkbox"/> No <input type="checkbox"/> Yes: Submit <a href="#">Add or Remove Subconsultant Request Form</a> & Certified Payroll
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Direct Expense Cost Derivation
			<ul style="list-style-type: none"> <li>• Detailed list of Approved Direct Expenses with unit, rate and total</li> <li>• Vendor quotes required for all externally generated Direct Expenses</li> </ul>
			<i>Lump sum quotes for Direct Expenses are not acceptable</i>
<input type="checkbox"/>	<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"/>	Post Design Services (PDS) Scope of Work
			<input type="checkbox"/> Using previously established PDS Rates?
			<input type="checkbox"/> Proposing new or establishing PDS Rates (Initial PDS only)? – Submit Certified Payroll
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Does the Contract have a DBE Goal? <input type="checkbox"/> No <input type="checkbox"/> Yes: Submit appropriate documents listed below:
			<input type="checkbox"/> <a href="#">Intended Participation Affidavit</a> – Consultant*, signed and dated
			<input type="checkbox"/> <a href="#">Intended Participation Affidavit</a> – Subconsultant, signed and dated
			<input type="checkbox"/> <a href="#">Certification of Good Faith Efforts</a> *, 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"/>	Other (describe): _____

**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 (1st contact for this work) \_\_\_\_\_

Calendar Days required to complete this Project/Task Order work: \_\_\_\_\_

☐ ADOT Project Manager Review and Concurrence Date: \_\_\_\_\_ PM/TM 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 (REQUIRED)
- ☐ Funding Source Approval – Check Appropriate Box(es) for type and attach documents (REQUIRED)
  - ☐ FHWA: Include Signed FARA form or FHWA email (include current available budget documentation)
  - ☐ JPA: Executed JPA (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 Available? ☐ No ☐ Yes (AFIS/PIRT SCREENSHOT REQUIRED)

☐ If no, anticipated authorization/funding availability date: \_\_\_\_\_

☐ If Post Design Services, attach:

☐ Resident Engineer's Email & FAST 125 Financial Card or Recap Sheet

☐ If Task Order Waiver is required; attach the completed and signed document (If needed, ECS will obtain FHWA signature)

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

**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

- 1.1. Overview by ADOT Project Manager
- 1.2. Special Issues and Concerns
- 1.3. 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
- 1.4. Design Standards *(if LPA project)*
- 1.5. Anticipated Project Meetings

**2. Stakeholders**

XX Minutes

- 2.1. Project Owner
- 2.2. ADOT District
- 2.3. Public Agencies
- 2.4. Utility Companies
- 2.5. Others

**3. Tentative Schedule**

XX Minutes

*(Revise to address the specific requirements of the Task Order)*

Milestone	Date
Pre-Submittal Review of Initial Scope and Fee with ADOT PM	
Initial Scope and Fee Submittal	
ADOT Comments Due	
Final Scope and Fee Submittal	
NTP	
Project Kickoff Meeting	
Stage I Submittal	
Stage II Submittal	
Stage III Submittal	
Stage IV Submittal	
PS&E Submittal	
Bid Advertisement	

**4. Action Items**



# 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

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### 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

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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

## TASK ORDER ASSIGNMENT SCHEDULE TRACKER

FI405

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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					NTP on: 5/5/2017 1				

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>

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[Launch Tracking Report](#)

[Launch Tracking Report - With Comments](#)

# New Development On-Call Contract

- 25 Consultants
- QBS – Qualifications Based Selection
- DBE Goal – 12.55%





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

