

Notes:

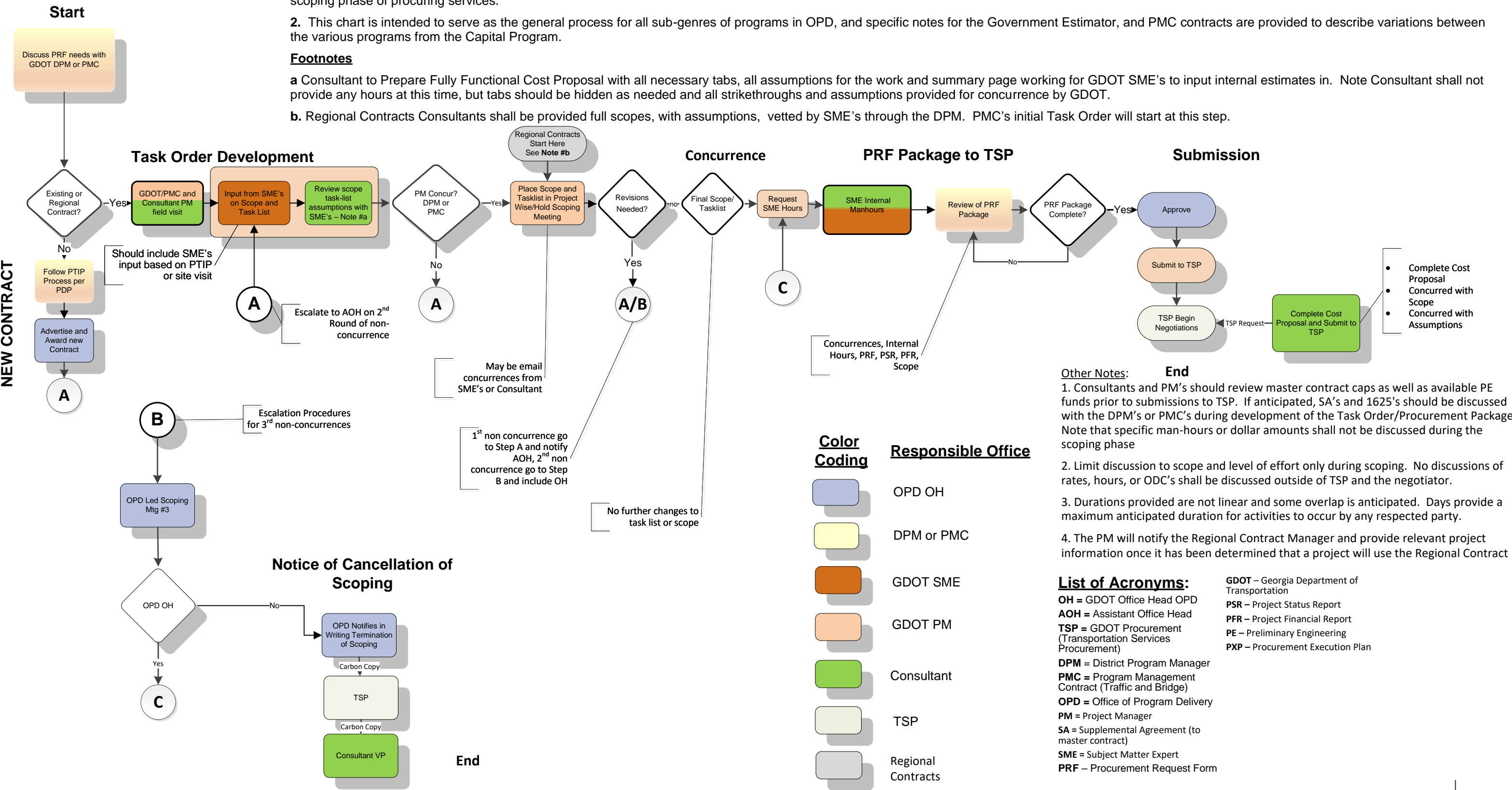
1. This chart outlines the process that will be followed by the GDOT Office of Program Delivery with respect to scoping initial or future task orders with consultants contracting with the Department. The Office of Transportation Services Procurement (TSP) includes further guidance and procedures for negotiations and contractual agreements with Georgia DOT. This procedure focuses specifically on the pre-negotiation/scoping phase of procuring services.

2. This chart is intended to serve as the general process for all sub-genres of programs in OPD, and specific notes for the Government Estimator, and PMC contracts are provided to describe variations between the various programs from the Capital Program.

Footnotes

a Consultant to Prepare Fully Functional Cost Proposal with all necessary tabs, all assumptions for the work and summary page working for GDOT SME's to input internal estimates in. Note Consultant shall not provide any hours at this time, but tabs should be hidden as needed and all strikeouts and assumptions provided for concurrence by GDOT.

b. Regional Contracts Consultants shall be provided full scopes, with assumptions, vetted by SME's through the DPM. PMC's initial Task Order will start at this step.



Contract Roles and Responsiblities

	A	B	C	D	E	F
1	Scenario Number	Contract	Environmental	Which Office initiates Task Orders?	Notes	Procurement Coordination/Invoice Review Responsibility
2	1	OPD Master Contract (Project-specific or batch-procured)	Consultant (Area Class Codes advertised)	OPD	If project has a batch or individual project contract, OPD will initiate Task Orders to cover all required deliverables. SMEs are responsible for approval/provide scope and man in-house hours for negotiations. Area Class Code not advertised must be delivered via a OPD regional contract or SME Menu of Services contract.	OPD
3	2	OPD Regional Contract	In-house/Consultant Split (e.g., one or more discipline in-house and one or more consulted out)	OPD	If OPD Regional Contract is to be used for discipline tasks OPD will initiate Task Orders. SMEs can request to use contract if they can not or do not have a MOS (Menu of Services) contract. The SME OH must make the request to the OPD Director/OH to reassign contract assignments.	OPD
4	4	MOU (Menu of Services) Contract	Area Class Code specific	SME Office	SME is responsible for task orders/work orders for any scope they requested stay in-house via PTIP. If SME is unable to complete work assigned to their office it is expected their MOS contract will be used. However if the SME does not have a contract the OH can make a request to the OPD Director/OH to reassign scope to the regional contract to be managed by OPD.	SME

## **Non-Traditional Task Order Definitions and Instructions**

- Refer to Rider Memos Pricing dated February 2023
  - The GDOT PM must send an email to their director for approval to utilize rider task order with amount and level of effort unknown.
  - New scope/know deliverables not included in a task order must go through the negotiation process as cost plus fixed fee.
- Billable rates task orders that do not require director approval:
  - UOC revisions and shop drawings task orders are approved by the office head via RTS.
- PXP (Plan Execution Plan) task orders - should be a reasonable amounts and limited time frames (ex: \$6k and 1 year).
  - These have a defined scope
- Increased level of effort for a negotiated task order; example needing more archeology transects than assumed in the task order can be covered under a Conditional NTP.
  - This is permitted if there are funds remaining and the associated deliverable is complete.
  - Fix fee is not permitted for transfer of funds from Prime to sub or vice versa.

**DATE:** December 1, 2022

**FROM:**   
Meg Pirkle, P.E., Chief Engineer

**TO:** GDOT Divisions/Offices/Districts, Consultant Relations Committee

**SUBJECT:** Best Practices for Procurement Plans

The **GPTQ Procurement Subcommittee** has developed a Negotiations Task Force to improve the scoping and negotiations process. The task force is focused on determining best practices to decrease the time from project award to Notice to Proceed and to decrease the duration of the negotiation process in general. An accurate procurement plan assists the project manager in planning the scope and time frames needed for subsequent task orders to avoid future delays during project delivery.

The task force has developed the following best practices to assist in the development of procurement plans:

- An initial billing rates task order to develop and deliver a project Execution Plan (PXP) shall include development of a procurement plan that describes the anticipated task order requirements for the life of the project/contract. Simultaneously, a Cost plus Fixed Fee (CPFF) task order shall be developed for early project phase scope of work, and an additional billing rates task order(s) shall be developed for project management and coordination and any scope of work for which the effort cannot yet be determined. The billable rates task orders are intended to serve as a “rider” to the CPFF task orders that capture project management and coordination efforts in addition to scope items for which the effort cannot yet be determined.
- Subsequent CPFF task orders shall include the project phased scope of work as determined by the procurement plan and remaining project development tasks. Subsequent billing rates task orders for project management and coordination and for additional undefined work shall be developed.
- Billing rates task orders may be established for 12-month periods. The duration of the billable rates task orders should be discussed and negotiated during the scoping process and should consider the timing of consultant’s personnel and overhead rates updates in addition to aligning with the duration of the project’s phases.

- As described in the June 6, 2022 Interoffice Memo titled “Best Practices for Scoping GDOT Task Orders”, the CPFF task orders should target a 6 month duration for procurement. Billable rates task orders should target approximately 2.5 months from initiating the process between the consultant and GDOT PMs and obtaining NTP.
- Contracts with multiple PIs will have one billable rates task order for developing the PXP plan for the entire bundle of projects. However, separate billable rates task orders are required for each PI to cover work specific to that PI. The management and/or design tasks for specific PIs should not be captured in the PXP task order for contracts with multiple PIs.
- GDOT PM approval is required for using billable rates task orders for miscellaneous tasks that were not included in the CPFF scope. The consultant’s invoice should also include a summary of management and coordination efforts that occurred during the invoiced period for documentation.
- Attached is an example procurement plan. This example is not prescriptive to all contracts and should be modified to include the specific task orders that are anticipated.

The task force will continue evaluating the process and will present additional recommendations as those are developed.

**DATE:** February 1, 2023

**FROM:** Albert v. Shelby, III, Director of Program Delivery

**TO:** Division of Program Delivery / Office of Procurement

**SUBJECT:** Billable rates “Rider” pricing

Related to the December 1, 2022 memo from the Chief’s Office called “Best Practices for Procurement Plans”; on larger capital projects, please use the following price guidance as a start for the rider billable rates contracts:

- PXP Rider + PM hours = \$75k
- Preliminary Plans PM hours + “what if” hours = \$100k
- Final Plans PM hours + “what if” hours + ROW revisions = \$100k

The usage of the billable rates riders should be requested monthly by the consultant PM to the GDOT PM with a reason and a projection of number of hours expected to be utilized. Documentation of that usage should be sent in with the CMIS invoice at the end of that month.

Additional riders can be requested if the initial rider is depleted, on the condition the depletion was properly documented for legitimate purposes. Riders should not, under normal conditions, last longer than 12 months. Upon the 12<sup>th</sup> month a new rider is suggested to update bill rates and overhead rates.

**DATE:** February 27, 2023

**FROM:** Albert V. Shelby, III, Director of Program Delivery

**TO:** Division of Program Delivery / Office of Procurement

**SUBJECT:** Billable rates for Bridge PMC – PXP “Rider” pricing

Related to the December 1, 2022, memo from the Chief’s Office called “Best Practices for Procurement Plans”; on Bridge Replacement projects, the following price guidance for the rider billable rates contracts:

- PXP Plan = \$10k average per project, one PXP contract with per bundle max of \$50k
- Concept and Preliminary PM hours + “what if” hours (by PI #) = \$50k
- Final Plans PM hours + “what if” hours + ROW revisions (by PI #) = \$50k

The usage of the billable rates riders should be requested monthly by the consultant PM to the GDOT PM with a reason and a projection of number of hours expected to be utilized. Documentation of that usage should be sent in with the CMIS invoice at the end of that month.

Additional riders can be requested if the initial rider is depleted, on the condition the depletion was properly documented for legitimate purposes. Riders should not, under normal conditions, last longer than 12 months. Upon the 12<sup>th</sup> month, a new rider is suggested to update bill rates and overhead rates.