

Continuing Services Contract Design Task Work Order Development Plan

1. The Local Agency will provide the District a Stage 1 (Preliminary Local Agency) scope of services and design man-hour estimate. If there is a study, or any other supporting/back-up documentation, the Local Agency will supply this as well.
2. The District will perform an initial review of the Stage 1 scope of services and design man-hour estimate. The District will provide the Local Agency with comments on the scope and estimate. (District review - 4 weeks)
3. The District will schedule a face-to-face meeting to discuss District comments on the Stage 1 scope of services and estimate. Review of project funding will take place during this meeting.
 - a. If additional funding needs are identified during the face-to-face meeting, the Local Agency will coordinate accordingly with the appropriate MPO/TPO and/or internal Local Agency resources, to determine if funding is available.
 - i. If additional funding can be identified, or the scope can be modified in such a way to result in sufficient funding, the process will continue to step 4.
 - ii. If sufficient funding for the project is not available, the project will be deferred or deleted. If deferred, process will start over when the new funding year approaches.
4. The Local Agency will update the Stage 1 scope of services and design man-hour estimate, as necessary, resulting in the Stage 2 (Finalized Local Agency) scope of services and design man-hour estimate. The Local Agency will provide a copy to the District for project file documentation. (Local Agency Update – 2 weeks)
5. The Local Agency will provide the Consultant (copying District) the Stage 2 scope of services, and a face-to-face meeting will be scheduled by the Local Agency with the Consultant and the District to discuss the project.
6. The Consultant will prepare their technical scope and staffing (fee) proposal based on the Stage 2 scope of services and the meeting discussion. The Consultant will provide the technical scope and staffing proposal to the Local Agency (copying District). (Consultant preparation time – 2 weeks)
7. The Local Agency and District will review the Consultant technical scope and staffing (fee) proposal against the Stage 2 scope of services and design man-hour estimate. If there are any major comments on the technical scope or staff hours (fee), the Local Agency will provide these comments to the Consultant for consideration/response. (Review time – 2 weeks)
8. During the review period (in Step 7), a meeting will be scheduled by the Local Agency with the Consultant for negotiation discussions (*may include District at Agency's request*).

9. Once the Local Agency has completed their review of the Consultant technical scope and staffing (fee) proposal and any major comments have been addressed, the meeting (from Step 8) between the Local Agency and Consultant (prime and subconsultant(s)) *(and District if requested)* will take place. During this meeting, the technical scope of services and design man-hours for the project will be negotiated/developed by the Local Agency and Consultant, resulting in Stage 3 (Finalized Consultant) scope of services and design man-hours. (Local Agency/Consultant coordination and update – 2 weeks)
10. If additional funding is needed based on consultant negotiations, the Local Agency will coordinate accordingly with the appropriate MPO/TPO and/or internal Local Agency resources to determine if funding is available.
 - a. If additional funding can be identified and obtained the process will continue to Step 11. If the Local Agency will be providing local funds to the District, a Locally Funded Agreement (LFA) will need to be executed.
 - b. If sufficient funding for the project is not available, the Local Agency can either:
 - i. Defer or delete the project. If deferred, process will start over when the new funding year approaches.
 - ii. Reduce the scope. If scope is reduced, the Consultant and Local Agency will continue coordination efforts to revise the Stage 3 (Finalized Consultant) scope of services and design man-hours for the project. (Revision time – 2 weeks)
11. Local Agency will confirm to the District that they concur with the Stage 3 (Finalized Consultant) scope of services and design man-hours final documents.
12. The District can begin the process of executing the Task Work Order with the Consultant. (4-6 weeks, once process starts)