



FINANCIAL SERVICES DEPARTMENT

Rotation List Management





Introductions Central Procurement Capital Contracting Professional Services – Rotation List Management

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Session Overview

What is a Rotation List?

Roles and Responsibilities

Rotation List Assignments and Processes Consultant Guidelines for Fee Proposals

What is a Rotation List?

Rotation Lists are a list of Consultants providing professional services on a regular basis for expedited selection and assignment.

Types of Rotation Lists include:

Civil Engineering, Structural Engineering, General Architectural Services, Water and Wastewater Pipeline Engineering, Surveying, and Flood Hazard Mitigation.

- Assignments are made on a rotating basis dependent on the amount of authority the Consultant has remaining.
- Public Works, Austin Water Utility, Austin Energy, Aviation, PARD, Library, and Building Services are some users of Rotation Lists.
- Capital Contracting currently manages about 40 rotation lists accepting new assignments.
- Capital Contracting manages an additional 50 rotation lists which have open contracts in support of project continuation and/or additional services requests from initial new assignments.
- Assignments are made to Consultants on a rotating basis, thus the name Rotation List.

Rotation List Manager Roles and Responsibilities



What Does a Rotation List Manager Do?

- Implements effective mechanisms for managing Rotation Lists.
- Ensures consistency in assignment processes across all Rotation Lists and ensures appropriate assignment methodology is used.
- Adheres to authorization limits with exceptions approved and documented.
- Authorizes documents for Notice to Proceed (NTP) to be issued by the Project Manager.
- Maintains data properly for their Rotation Lists.
- Documents actions/decisions that affect Rotation Lists.
- Responds promptly and effectively to the needs of all stakeholders.
- Partners with Sponsor Departments and Consultants to deliver quality projects.
- Performs detailed contract compliance reviews.





What are the Rotation List Manager's Priorities?

- Process NTP documents in a timely manner.
- Establish responsive, clear, and effective communication between the customer and the Consultant.
- Pay attention to detail in compliance reviews of proposals.
- Be a problem solver to work effectively and find workable solutions to meet the needs of customers.

Rotation List Manager Roles and Responsibilities



What are a Rotation List Manager's Deliverables?

- NTP Documents
- NTP Reports (eCAPRIS/Rotation List Database)
- Supplemental Amendments
- Closeout Documents
- Sourcing Documents
- Recommendation for Council Actions (RCAs) Increase Authorizations/ New Rotation List Involvement/Pre-Solicitation Actions
- Consultant Rates (Newly added Subconsultants)



Rotation List Assignment Process

- Step 1: Project Manager (PM) or requesting entity submits an Assignment Request.
- Step 2: Rotation List Manager determines the appropriate Rotation List.
- Step 3: Rotation List Manager assigns the project to the next Consultant on the list.
- Step 4: Consultant has five business days to accept/reject the Assignment Letter.
- **Step 5:** PM negotiates acceptable proposal with Consultant using the Proposal Guidelines provided by the Rotation List Manager.
- Step 6: Rotation List Manager reviews and approves proposal for compliance.
- Step 7: Rotation List Manager finalizes Notice to Proceed (NTP) documents.

City Project Managers submit their Assignment Requests via eCAPRIS



	CT Reporting and Information System	
Ruben Cantu	My eCAPRIS Projects Subprojects FDU	Is Sourcing Contracts Task Orders Bonds Requisitions Inspections Reports Logout
Searches Project	Assignment Request	
Subproject	* Request Type:	Rotation List Assignment 🗸
Inspection FDU	* Assignment Type:	✓
Sourcing Contract	Subproject ID:	
Task Order Requisition		Check this box if Non-CIP Funding ②
Vendor Commodity Code	* Project Name:	
Lists Assignment	* Sponsor Department(s):	Select Some Options
Requests GMP Requests List	* Project Manager Name:	Cantu, Ruben
Inspection Projects Rotation Lists	* Project Manager Phone:	512-974-7116
Subprojects	Master Agreement/Contract Number:	3
Subproject Impact Bonds	* Project Description:	
Bonds Overview		0 characters (500 max)
Contracts Assignment Request	Project Stage(s):	Select Some Options
GMP Request Monitoring Violations Report	Total Design Budget for Project:	
Sourcing	Construction Budget:	
Advertisements eResponse	Total Consultant Services (all phases):	
Sourcing Calendar Sourcing Request	* Anticipated Assignment Value:	
User Resources	Comments:	
Trade Summaries Release Notes NEW Change Appearance Change Password Help	* Required Professional Services:	0 characters (1000 max) Select Some Options
-	Funding	
Administration Admin Functions		Reporting
	FDU Code Code	Code Amount %
		Total:
	L	Add Another FDU
	Submit	

9



FINANCIAL SERVICES DEPARTMENT

Assignment Types

New Assignment Project Continuation Additional Services



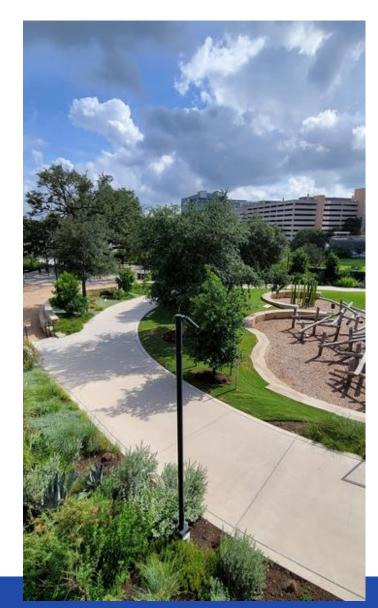
New Assignments



What is considered a New Assignment?

- New Assignments are considered projects that never had work performed.
- Rotation List Managers will send out an Assignment Letter to the next Consultant on the Rotation List to accept or reject the assignment.

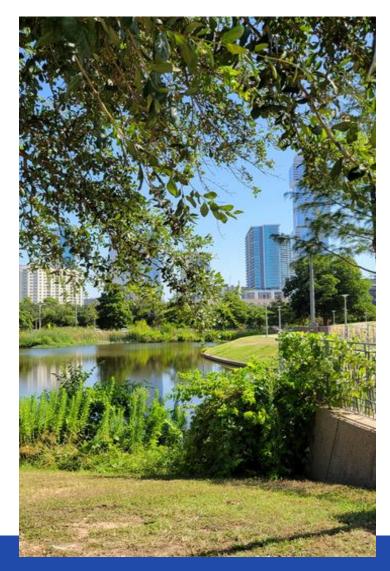
Project Continuation



What is considered a Project Continuation?

- Project Continuations are assignments that are moving on to the next phase of the project.
- Phases include the following:
 - Preliminary Phase, Design Phase, Bid Award Phase, Construction Phase, and Post-Construction Phase.
- A proposal will be submitted upon an Assignment Request by the PM. This proposal has been negotiated and reviewed by the PM before submission.
- Delivery Order (DO) will remain the same, but an alpha character will be added at the end of the number.
- Assignment number changes after the decimal point. For example PR# 5.2, PR# 5.3, PR# 5.4, etc.

Additional Services



What is considered an Additional Service?

- Additional Services are considered assignments that had unexpected charges in the initial phase of the assignment.
- A proposal will be submitted upon Assignment Request by the PM. This proposal has been negotiated and reviewed by the PM before submission.
- DO number remains the same.
- Assignment number changes after the decimal number. For example PR# 5.1, PR# 5.2, PR# 5.3, etc.



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CONSULTANT GUIDELINES FOR FEE PROPOSAL

The following are guidelines for the submission of fee proposals in response to Rotation List Assignments. This guideline includes the information needed by the City to accept the fee proposals and will assist the Consultant in the development of fee proposals.

1. Proposal Cover Letter

A proposal should be accompanied by a cover letter on the Prime Consultant firm's letterhead that is dated and signed by a representative from the Prime Consultant firm. The cover letter should include:

- The Professional Services Agreement (PSA) Name and Number (i.e., 2015 General Architectural Services Rotation List / PA150000005).
- The Project CIP ID# (i.e., 30001.123).
- The Proposal Request (PR) Number (i.e., PR# 1.2).
- The Project Name (i.e., Barton Springs Pool Bathhouse Upgrades).
- The name of the City of Austin Project Manager
- A brief narrative of the scope of services being provided.
- The total fee proposal cost.

2. Statement of Scope, Services Description, and Personnel Breakdown

Provide a task-oriented statement of scope and services description. The Statement of Scope and services description must:

- Correspond to the basic services described in the Professional Services Agreement (PSA) for each project phase (unless otherwise directed). For example:

Scope of Services

- Basic Services
 - Task 1 (Project Management Services)
 - Task 2 (Preliminary Engineering)
- Task 3 (Design Engineering)
- Special Services
 - Task 1 Permitting
 - Task 2 Survey
- Reflect the provided Resource Allocation Plan (RAP) as discussed in item 5 of these guidelines.
 - Include a list of milestone submittals and their durations measured from Notice to Proceed (e.g., 60% plans – 6 months from NTP)
- State those services explicitly excluded from the scope (if appropriate).
- Identify the compensation method agreed to by the Project Manager (Lump Sum vs Time & Material or both)
- Include proposal language and terms that comply with the PSA Terms and Conditions.
- Include a list of deliverables.

Provide a breakdown of the estimated personnel labor requirements per task identified in the statement of scope and service description. The personnel labor breakdown must:

- Reflect the estimates that were used to create the maximum not-to-exceed fee proposal.
- Include the hourly rates titles for each employee.
 - Ensure Key Personnel names are listed and match current SOQ org chart or approved request for change KP documentation.
- Include the number of hours each employee will work on the project.
- Utilize the currently approved loaded hourly rates as identified on the consultant's approved rate sheets.

Consultant Guidelines for Fee Proposal – Example

Consultant Guidelines for Fee Proposals



- Proposal Cover Letter
- Statement of Scope, Services Description, and Personnel Breakdown
- Fee Proposal Matrix
- Subconsultants' Proposals
- Resource Allocation Plan (RAP)
- Subconsultant Utilization Form (SUF)
- Project Schedule
- Proposal Requirements Checklist
- Miscellaneous

Cover Letter – Must include the following:



- The Professional Services Agreement (PSA) Name and Number (i.e. 2019 General Architectural Services Rotation List/PA19000071).
- The Project CIP ID (i.e. 3001.123).
- The Proposal Request (PR) Number (i.e. PR# 1.2).
- The Project Name (i.e. Barton Springs Pool Bathhouse Upgrades).
- City of Austin's Project Manager.
- A brief narrative of the Scope of Services being provided.
- The total fee proposal cost.

Statement of Scope – Should include the following:



- The Basic Services described in the Professional Services Agreement (PSA) for each project phase (unless otherwise directed).
- Scope of Services:
 - Basic Services
 - Task 1 (Project Management Services)
 - Task 2 (Preliminary Engineering)
 - Task 3 (Design Engineering)
 - Special Services
 - Task 1 (Permitting)
 - Task 2 (Survey)

Statement of Scope – Should include the following: (Continued)



- State those services explicitly excluded from the scope (if appropriate).
- Identify the compensation method agreed to by the Project Manager.
- Proposal language that comply with the PSA Terms and Conditions.
- A list of deliverables.
- A breakdown of the estimated personnel labor requirements per task identified in the Statement of Scope and service description.



Complete the fee proposal matrix in a manner that accurately reflects the fee proposal and task/fee breakdown stated in the RAP.

Provide a maximum not-to-exceed fee proposal. The proposal must include:

- The labor costs showing approved employee classification titles and rates.
- The identified reimbursable project expenses.
- The approved prime Consultant rate sheets used to prepare the proposal.
- A summary of Subconsultants costs.

Fee Proposal Matrix – Example

			to match wh	at is on City										
			te sileet		Fee Estima	te for Scope of S	ervices							
		Position	Principal	Man. Eng. VI	Sup. Eng. III	PE IV	PEI	EITI	Admin Assist I	CAD Tech III		<u> </u>		
	Approved Rate		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		SUBTOTALS	i	TOTAL
Item No.	Sub-Item Description	No. of Item	Hours	Hours	Hours	Hours	Hours		Hours	Hours	Hours	Cost	Subtotal	
TASKI	Project Management Services													
	Project Management													
\vdash	Herding Cats Talking about Cats		1	2	3	4	5	6	7	8				
\vdash	Cat Workshop													\$1.00
	Meetings about Cats													1
	How to design the right Dog													
	Total Hours (per Position)		1	2	3	4	5	6	7	8]
	Total Cost (per Position)		\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00				
TASK II	Preliminary Engineering Services													
	Dog Reports		1	2	3	4	5	6	7	8				
														\$1.00
	Total Hours (per Position)	_	1	2	3	4	5	6	7	8				1
	Total Cost (per Position)		\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	\geq			

of hours and cost per title needs to be totaled at bottom of sheet

What CCO looks for:

1. Rates and Titles are matching against City approved/current Rate sheets (Any Key Personnel should be named)

2. We calculate total hours x rate per title

3. Percentage of hours for Key Personnel against the project (eg. Project Principle has 20% of the hours = Red Flag)

 Reimbursable items need to be spelled out and in detail (Local Mileage = Red flag / Out of town travel = Yellow flag / Permits or printing = Green flag)

COA Approved Loaded Hourly Rate Sheets

 Rates must be current as of the date of the Assignment Letter and must be included in every proposal. Rates for all subconsultants in the proposal must also be included.





<u>NOTE</u>: A Consultant may use their expired rates by submitting an email to the Rotation List Manager stating their expired rates are acceptable to them AND the Consultant must initiate the process of renewing their rates.

Resource Allocation Plan (RAP) – Example

4	A	В	С	D	E	F	G
	ATTACHMENT 1: RESOUR	CE ALLOC	ATION PL	AN			
	Project: Capital Contracting Te	emplate Exa	mple / PR#	3.1			
-							
_	Note: PM will advise Consultant of lev	el of detail and	d payment ben	chmarks desire	d for Task Descr	iptions	
	Task Description	Budget	Start Date	End Date	% Complete	% Paid	% Time
-	A. Preliminary Phase	\$0.00					0.00/
+					0.0%	0.0%	0.0%
, -	Phase Total				0.0%	0.0%	0.0%
_	B. Design Phase				0.076	0.076	0.076
,	Task 1	\$6,000.00			0.0%	0.0%	0.0%
3	Task 2	\$1,230.00			0.0%	0.0%	0.0%
I.	Task 3	\$650.00			0.0%	0.0%	0.0%
;	Task 4	\$720.00			0.0%	0.0%	0.0%
5	Task 5	\$65.00			0.0%	0.0%	0.0%
7	Task 6	\$120.00			0.0%	0.0%	0.0%
3	Task 7	\$55.00			0.0%	0.0%	0.0%
)					0.0%	0.0%	0.0%
)	Design Phase Total	\$8,840.00	7/1/2022	9/4/2022	0.0%	0.0%	0.0%
					0.0%	0.0%	0.0%
-					0.0%	0.0%	0.0%
5					0.0%	0.0%	0.0%
					0.0%	0.0%	0.0%
2	Phase Total				0.0%	0.0%	0.0%
	C. Bid-Award Execution Phase	\$0.00			0.076	0.076	0.076
3	e. Bla-Award Excedition Phase				0.0%	0.0%	0.0%
	Phase Total				0.0%	0.0%	0.0%
	D. Construction Phase						
	Task 8 Construction Phase Services	\$7,525.27			0.0%	0.0%	0.0%
2					0.0%	0.0%	0.0%
3	Reimbursable Expenses	\$3,000.00			0.0%	0.0%	0.0%
ŧ.	Prime Provider Mark-up (5%)	\$114.27					
5							
;	Construction Phase Total	\$10,639.54	10/1/2022	10/26/2022			
	Di				0.0%	0.0%	0.0%
-	Phase Total	CO 00			0.0%	0.0%	0.0%
	E. Post-Construction Phase	\$0.00			0.0%	0.0%	0.0%
-	Phase Total				0.0%	0.0%	0.0%
,	Fliase Total				0.076	0.076	0.076
3	Project Total	\$38,959.08			0.0%	0.0%	0.0%
1	, roject rota,	000,000.00			0.070	0.070	0.070
; Ī	APPROVED FIXED CONSTRUCTION BUDG	ET:	\$85,000.00				
;			000,000.00				
7	DATE OF CURRENT FCB:	· · · · · ·	4/26/2022				
3							

Subconsultant Utilization Form (SUF) – Example

	Subconsultant Utilization Fo	rm			G	apital Contracting O	ffice	Contra	ct Procuremen	t Divisio
	Deservices Lies Normality	Rotation List			1					
	Rotation List Name/#:		Name		-	Contract #	_	Project Mgr:	Priname	
5	Project Name:	Project Name			Assi	gnment • / P.R •:	_		3 /	3
2	Date:	Sub	mitted by:		Firm:		Prime C	Prime Consultant		
,	Firm		Cert Type		Descrip	ption of Work		Work Hours	Amour	x\$
	Prime Consultant			< Brief Desc	orinition o	of work to be performed)		0.0	\$26.480	1.67
-	Subconsultant 1					of work to be performed)		0.0	\$0.0	
_	Subconsultant 2					of work to be performed)		0.0	\$0.0	-
	Subconsultant 3					of work to be performed)		0.0	\$5,000.00	
_	Subconsultant 4		+ +			of work to be performed)		0.0	\$1,624.00	
_	Subconsultant 5		+ +			of work to be performed)		0.0	\$0.0	
_	Subconsultant 6		+ +			of work to be performed)		0.0	\$0.0	-
_	Subconsultant 7		+ +			of work to be performed)		0.0	\$0.0	-
	Subconsultant /		+ +					0.0	\$0.0	-
_			+ +			of work to be performed			\$0.0	-
	(Subconsultant)					of work to be performed)		0.0		-
_	(Subconsultant)					of work to be performed)		0.0	\$0.0	-
_	(Subconsultant)					of work to be performed)		0.0	\$0.0	-
_	(Subconsultant)					of work to be performed		0.0	\$0.00	
3	(Subconsultant)					of work to be performed)		0.0	\$0.0	-
6	(Subconsultant)			<brief desc<="" td=""><td>cription o</td><td>of work to be performed)</td><td></td><td>0.0</td><td>\$0.0</td><td>0</td></brief>	cription o	of work to be performed)		0.0	\$0.0	0
,	Please calculate participation pe	icentages for each cate		IWBE PART			TOTAL	0.0	#33,104	
7	Please calculate participation pe assignment	-		nal dollar arno	ount for a		nined carey	oory <u>divided by</u> i		
7		-	pory, based upon the to	nal dollar arno	ount for a	certified litms in the spec	ntind callog re Americ	oory <u>divided by</u> i	he Total Amount	of the WBE
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Project Schedule

Proposal Requirement Checklist

Miscellaneous

Include a schedule that corresponds to the task-oriented Statement of Scope. A Gantt chart format is preferred.

This document will help the Consultant ensure all required items necessary for the review and acceptance of a proposal are included in the initial submission to reduce delays in processing. Complete all fields on the form with the requested information.

Consolidate all proposal documents into a single PDF.

It is the Consultant's responsibility to ensure their Certificate of Insurance (COI) is current. If expired, the Consultant must provide a copy of their renewed COI to be included in their proposal.

To Review

- Here is what we learned:
- What a Rotation List is.
- What the roles and responsibilities of a Rotation List Manager are.
- What the steps and processes are for different types of Rotation List assignments.
- The proper way to prepare a fee proposal.







Thank you for your time!



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https://www.austintexas.gov/page/rotation-lists#overlaycontext=department/capital-contracting/programs