

Consultant Selection and Contract Administration Training and Qualifications for Certified Local Agencies

Consultant selection is typically a team effort between a designated procurement or contracts specialist and the project manager. Certified LPA staff involved in consultant selection on federal-aid projects must complete the applicable training listed below and be familiar with the key guidance and resources.

I. Qualifications / Training Requirements

A. Procurement staff

1. All procurement methods - View the following three [Federal-aid Essentials Training Videos](#): (1) [Consultant Services Overview](#), (2) [Hiring a Consultant Using Competitive Negotiation Procedures](#), and (3) [Organizational and Consultant Conflicts of Interest](#).
2. Small Purchase (formerly called “Direct Appoint”). Selection and contract award must be prepared and processed by an individual employed by the Certified LPA that meets the following minimum qualifications:
 - a. Attend ODOT or DAS Statement of Work for Personal Services class (or equivalent) in last 3 years and be familiar with the [ODOT Statement of Work Writing Guide](#). Course linked below will satisfy this requirement.
 - [DAS – PS – Writing Statement of Work](#) (live webinar)
 - b. Attend Negotiation* training (or equivalent) in last 3 years
 - c. Complete DAS Personal Services Contract Administration Training Certification (or equivalent) in last 3 years (*includes a negotiation module)
 - [DAS - PS - Contract Administration Training Certificate](#) (10 module self-paced virtual training)
 - d. Current certification in public procurement (i.e., CPPB, CPPO, OPBC from [NIGP](#), [NASPO](#), or [DAS](#) will substitute for items a. through c.)
3. Intermediate (non-A&E)/Informal (A&E)/Formal (A&E and non-A&E). Solicitation and contract award must be prepared and processed by an individual employed by the LPA that meets the following minimum qualifications:
 - a. Have a.-c. or d. as required for Small Purchase; **and**
 - b. Have a minimum of 3 years in public procurement that includes experience processing Informal/Intermediate and Formal RFPs and personal service contracts.

B. Project staff

1. View the following three [Federal-aid Essentials Training Videos](#): (1) [Consultant Services Overview](#), (2) [Hiring a Consultant Using Competitive Negotiation Procedures](#), and (3) [Organizational and Consultant Conflicts of Interest](#).
2. Complete DAS Personal Services Contract Administration Training Certification (or equivalent) in last 3 years
 - [DAS - PS - Contract Administration Training Certificate](#) (10 module self-paced virtual training)
3. Attend ODOT or DAS Statement of Work for Personal Services class (or equivalent) in last 3 years and be familiar with the [ODOT Statement of Work Writing Guide](#).
 - [DAS – PS – Writing Statement of Work](#) (live webinar)

II. Key Guidance & Resources

Procurement and project staff must be familiar with the following guidance and resources:

- A. [Local Agency Guidelines for Certified Local Public Agencies](#), Section C, Chapter 4: Overview of consultant selection and contract administration requirements for certified LPAs.
- B. [Certified Local Agency Resources for Consultant Selection](#):
 1. *LPA A&E Requirements Guide*
 2. *LPA Non-A&E PSK Requirements Guide*
 3. Required A&E and Non-A&E Contract and RFP templates.
 4. [Statement of Work Library](#): Task Language Templates for Certified Local Agency Projects.
 5. Statement of Work Writing Guide
 6. How to Automate SOW Reviews to Find Problem Areas