

DCHC MPO presentation



















High Level Overview for DCHC MPO. Federal funds overview

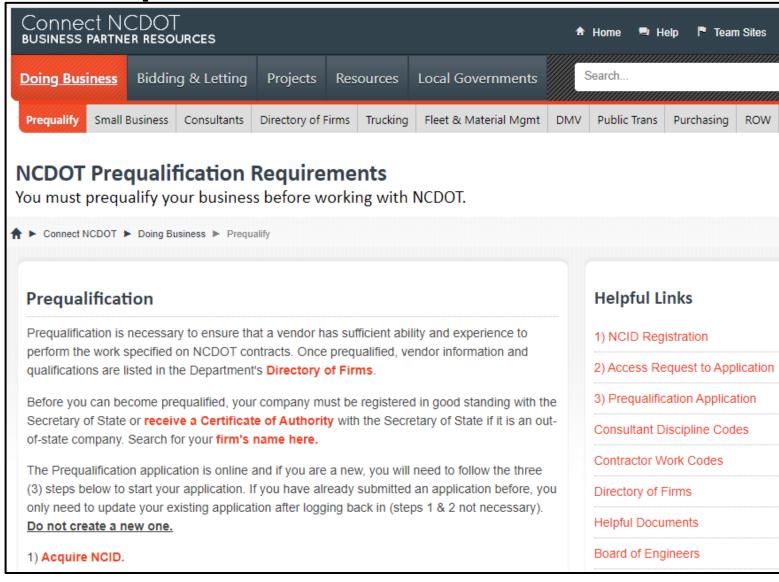
October 10, 2023

Transportation Planning Division

Include your TPD coordinator throughout the procurement process

- Remember to include your TPD coordinator (Julie) in the:
 - review of draft scope
 - Eligible work, not more than 10% design, etc
 - review of your RFLOI
 - Evaluation Criteria, selection of correct discipline codes
 - consultant selection process and selection team
 - Draft cost proposal and draft contract review
 - OIG review prior to entering into (executing) contract

Prequalification info for consultants



Link to NCDOT's Prequalification web page

For consultants to register with CRS

(Consultant Rate System)

CRS Preparation and Access memo

Consultant Rate Schedule System May 22, 2019 Page 2

the same person for multiple prequalified vendor locations, if applicable). While some firms may have multiple offices in North Carolina, many are prequalified under a single office (Vendor Number). CRS receives prequalification data from the Prequalification System for each Vendor Number. Firms should reference the "Private Engineering Firms - Steps to Prepare for the NCDOT Consultant Rate System" for more information on how to prepare.

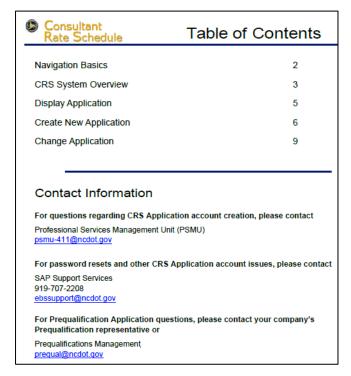
The critical initial step to begin the CRS process is that the firm must determine a "CRS User" responsible for maintaining overhead, cost of capital, and salary rates in CRS. To begin the CRS process, the firm's "CRS User" should complete the "Consultant Rate System (CRS) Access Authorization Request Form" and submit the form as directed in order to be granted access into CRS. Once access is granted to CRS, the firm's "CRS User" may enter the firm's rates for approval by NCDOT's Office of Inspector General (OIG). It is suggested that firms request access at least two months prior to the prequalification expiration month to allow sufficient approval time, especially for the initial data entry period.

Please plan to prepare your firm's staff information, rates and responsibilities for entry during your firm's next Prequalification period. Pages 2 and 3 of the document "Private Engineering Firms - Steps to Prepare for the NCDOT Consultant Rate System" will help you in this process, and will also include Discipline References and Career Banding Terms required to appropriately define the NCDOT "Project Work Role" of each or your firm's staff members entered into the CRS system.

Please disregard this memo if your firm only does work for Local Government Associations or private entities within the state of North Carolina and your firm does not plan to do work for NCDOT or work on projects with state or federal funding through NCDOT.

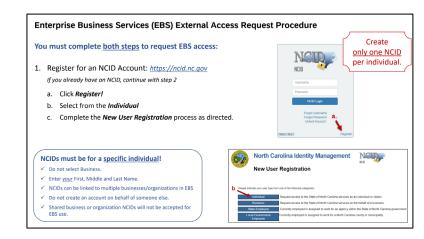
If you have questions about the Consultant Rate System, please contact the Professional Services Management Unit by email at psmu-411@ncdot.gov.

CRS Help document



These 3 documents found on NCDOT's web page:

CRS Access
Authorization
Request Form





On-call contracts – not exceed 5 years

- On-call contracts or **limited service agreements** (example: planning services on-call) **shall not exceed 5 years.**
- This includes the initial period plus all possible contract extensions.
- 23 CFR 172.9 (a) (3) (i)

On-call contracts, page 2

- There is no such thing as "MPO-wide" on call.
- Each jurisdiction has their own procurement procedures and has their own on-call.
- IE, One city can't procure for another city.

OIG Review

• Prime and all subcontractor rates must be reviewed.

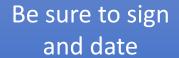
- MPO should submit OIG's Review letter <u>along with first study invoice</u> for NCDOT reimbursement.
 - This keeps these important documents as part of NCDOT's records (in SAP) and will assist the MPO in audits.

DBE-IS form is required

(if consultant / vendor used that quarter or invoice period)

- List payments to consultants (or vendors) that occurred in the quarter.
 - Includes any payments from LPA to MPO-member jurisdictions
 - (for MPO eligible work they may be project managing)
- Be sure the form is signed.
 - (certifying the payments listed are accurate)
 - PDF of DBE-IS form
- Only needed with invoices containing payments to consultants or vendors.

Example of OLD DBE-IS form



State of North Carolina Department of Transportation Subcontractor Payment Information

with Invoice To:

Bheshad Norowzi North Carolina Department of Transportation Transportation Planning Branch 1554 Mail Service Center

Raleigh, NC 27699-1554

Firm Invoice No. No rence NCDOT PO / Contract No ober WBS No. (State Project No.)

ontract N. sber 7500017326 39225.1.10

Date of Invoice Signed

Obtain PO and WBS numbers from TPD each FY

Redacted for privacy

Date Paid To

Redacted for privacy

Invoice Line Item Reference Payer Name	Payer Federal Tax Id	Subcontractor / Subconsultant/ Material Supplier Name	Subcontractor / Subconsultant / Material Supplier Federal Tax Id	Subcont Subc ant / Mar an Supplier This Invoice	Subcontractor / Subconsultant / Material Supplier This Invoice
Jul-14 City of Greenville City of Greenville	Total Amount P	MioVision Transmap Engineeri		\$ 5,263.00 \$ 29,458.67 \$ 34,721.67	8/20/2014 8/29/2014

Proof of Payment

- Evidence of Payment
- Copy (front and back) of cancelled checks, or
- Copy of bank statement showing where checks have cleared, or
- A EFT/ACH statement Electronic Fund Transfer / Automated Clearing House
- Why? per 2CFR200.302 "...and the tracing of funds to a level of expenditures adequate to establish that such funds have been used according to the Federal statutes, regulations, and the terms and conditions of the Federal award."

OIG letter – include in 1st invoice

If requesting reimbursement for consultant work:

- On the <u>first</u> invoice reimbursement request to NCDOT (to the COG if you're a member agency performing the study), include the OIG review letter for the study/project.
 - This will keep this vital piece of documentation stored in NCDOT's payment system and help you with audits.
 - Don't need to resend with subsequent invoices for the study.
- (in addition to the usual consultant invoices, statements of work, **DBE form**, and other invoice elements, etc)

Special Study Narrative (in UPWP)

Special Study Narrative is not just the name of the study.

It should include the name of the study <u>and</u> provide:

- a short description of the study
- who will do the study (consultant or MPO staff).