

Professional Services Contract/WA/SA/ Preparation Checklist

PROJECT NAME: _____

CONTRACT/WA/SA NO. _____

The following items are to be reviewed and confirmed before the WA/SA/ is processed:

ORIGINAL AGREEMENT

Agreement:

Contact Type Established
(check one):

- Lump Sum
- Cost Plus Fixed Fee
- Cost Plus Percentage
- Work Authorization-based
 - Initial WA scope, schedule, & Fee included
- Single Scope

Scope:

- Boiler plate scope used
- Contract specific scope used
- All Negotiation Notes have been addressed

Compensation:

Fee Spreadsheet included
(check one):

- Unit Price-based
- Hourly-based
- CA-01 F16/17 fee spreadsheet used
- Rates, overhead, & profit margin % and \$ clearly shown on fee spreadsheet
- All Negotiation Notes have been addressed
- FAR Overhead Statement provided
- Expense backup provided (equipment, cell phones, vehicle lease, printing)
- Budget and Funding Source Confirmed by Project Control Manager

Liquidated Damages:

- Discussed & agreed to

Insurance:

- Insurance forms included

Business Diversity

- Business Diversity forms included
- Fee Estimate supports achieving BDD Goal
- Business Diversity fee meets proposal commitment

Time of Performance:

- Contract expiration date agreed to & included

WORK AUTHORIZATION/SUPPLEMENTAL AGREEMENT

Original Agreement:

Contact Type Confirmed
(check one):

- Lump Sum
- Cost Plus Fixed Fee
- Cost Plus Percentage
- Work Authorization-based
- Contract Number Confirm
 - Applicable WA & SA # _____

Scope:

- Boiler plate scope used
- Contract specific scope used in description area or as Attachment A; including what, when, how much, with proper referencing to attachments

Time of Performance:

- Contract expiration date confirmed, not earlier than SA completion date
- SA Completion date provided and aligns with original documents

Compensation:

Fee Spreadsheet included as Attachment B
(check one):

- CA-03-F16 Task-based
- CA-03-F17 Unit Price-based
- Multiplier does not exceed 3.0
- Profit Margin does not exceed 12%
- Rates, overhead, & profit margin % and \$ clearly shown on fee spreadsheet
- Expenses shown are allowable as per original documents & NTTA policy
- If WA or SA is older than 6 months from date of contract, provide new FAR Overhead Statement Budget and Funding Source Confirmed by Project Controls Manager

Business Diversity:

- Fee Estimate supports achieving BDD Goal
- Business Diversity fee meets proposal commitment in the proposal

Change Document/s:

- Number Sequential to WA,
- Two Originals
- Documents correctly dated
- Complete and Correct Consultant firm name and address
- Fee matches from doc to doc
- Consultant firm name placed in "Named Parties Section"
- Consultant Authorization
- Name, Title provided and matches signature, and is dated
- CA-03-F2 WA/SA/CO Log accurate and complete
- Math check/ cell formulas on all documents
- NTTA Authorization applicable signature/s for dollar amount of document and dated

Procurement Specialist

Date