

Table of Contents

Appendices

Legislative Documents	A
Introduction	
Little Brooks Act	
County Board of Supervisors Policy B-17	
TLMA Policy: PUR 001 - Procurement and Payment Authorizations for Goods & Services	
TLMA Policy: AGY 009 - Signatures on Contract Documents	
Trans. Staff Memo - RE: Procedure regarding documents prepared for Director's signature.	
Trans. Staff Memo - RE: Form 11's regarding contract change orders and contract amendments.	
Trans. Staff Memo - RE: News releases for ground breaking and ribbon cutting ceremonies	
RFP/RFQ Process Documents	B
Introduction	
Professional Services Authorization Request Form	
Professional Services Processing Checklist	
Sample RFP/RFQ Advertisement	
Sample RFP/RFQ Consultant Notice Letter	
Sample RFP/RFQ Transmittal letter	
Sample RFP Document	
Sample Evaluation Rating Form (Individual Firm)	
Sample Evaluation Rating Form (Summary)	
Sample Selection Notification letters	
Short List - Not Selected	
Short List - Selected	
Final Selection - Not Selected	
Final Selection - Selected	
M/W/DVBE Certification Form	
General Services Agency - Consultant Prequalification Form	
Federal Form 254	
Federal Form 255	
County Modified Fed Forms 254/255	
Fee and Man-hour Proposal Preparation Guidelines	
Sample Fee and Man-hour Proposal print outs	
Contract Preparation Documents	C
Introduction	
Boilerplate Engineering Services Agreement	
County Terms and Conditions for purchase order services contracts	
General Conditions for public works contracts less than \$25,000	
Invoices/Progress Payment Documents	D
Introduction	
Invoice Template Instructions	
Sample Invoice format	
Cover Letter (use consultant letterhead paper)	
Invoice Payment Log	
Contract Summary	
Progress Payment (Summary)	
Progress Payment (P1, P2, P3 & P4)	
Man-hour Summary	
Invoice Documentation Cover Sheet	
Subconsultant Documentation Cover Sheet	

Table of Contents

Sample Progress Report format	E
Introduction	
Report Sections	
Progress Report Template Instructions	
Sample Progress Report	
Work Breakdown Structure for Transportation Projects	F
Project Work Breakdown Structure (WBS)	
Caltrans Uniform Filing System (UFS)	
Roadway Construction Cost Estimating Tools and Guidelines	G
Introduction	
Estimate Stages	
Planning Estimate	
Preliminary Estimate	
Engineers Estimate	
Preliminary Estimate Template Instructions	
Cost/Mile Calculation Guide	
Design as % of Construction Chart	
Sample Estimate Backup Calculation sheets	
Scheduling Tools	H
Basic Process	
Durations based on Construction Cost	
Sample Schedule	
Blank Data Entry Forms	I
Introduction	
Adobe Acrobat Automated forms	
- Professional Services Authorization Request Form	
- Professional Services Processing Checklist	
- M/W/DVBE Status Disclosure Form	
- Form 11 Contract Attachment	
- Design Review Routing Sheet	
- Letter of Transmittal	
Microsoft Excel Templates	
- Consultant Evaluation Rating Form	
- Consultant Evaluation Summary Form	
- Fee & Man-hour Proposal Worksheets	
+ Invoice Template	
+ Progress Report Template	
- Preliminary Cost Estimate Template	
Microsoft Word Templates	
- Design Review Comments Form	
+ Request for Proposal Boilerplate	
+ Contract Boilerplates	
+ Terms & Conditions	
+ Scope of Services (see also Appendix J)	
+ Schedule & Deliverables	
+ Budget (see also Appendix B)	

Table of Contents

Other Forms (Printable only)	
- Consultant Prequalification Vendor Information Form	
- Federal Form 254 (RFQ Questionnaire)	
- Federal Form 255 (RFP Questionnaire)	
- County RFQ/RFP Questionnaire (combines some of 254 & 255)	
Scope of Services (Sample Documents)	J
Introduction	
Engineering and environmental services on a federal interstate interchange project.	
Construction management services on federal interstate interchange.	
Material testing services.	
Roadway engineering and environmental services on local project.	
Assessment engineering services.	
Landscape maintenance services.	
Electronic Data	K

Note: Forms and Templates preceded with a plus sign (+) are not included in the printed appendix. Please read the introduction in the appendix for further clarification.