



### **OBJECTIVES**

- Site history and file review.
- Cleanup strategy.
- Scope of Work (SOW).
- Purchase Order (PO).
- Deliverables.
- Data entry.
- Contractor Performance Evaluations (CPE).
- Tracking and site file management.
- Communicating with the contractor.
- Communicating with the owner/Responsible Party (RP).



#### SITE HISTORY AND FILE REVIEW

- Eligibility status: Abandoned Tanks Restoration Program (ATRP), Petroleum Cleanup Participation Program (PCPP), Early Detection Initiative (EDI), Petroleum Liability and Restoration Insurance Program (PLRIP), cost share agreements (Storage Tank Contamination Monitoring (STCM) and eligibility docs in Oculus.
- Discharge information: Discharge reporting form (Oculus).
- Funding limits and expenditure to date:
  - EDI have no caps or ceiling amounts.
  - ATRP has a \$0 deductible.
  - PCPP have caps and cost shares.
  - o PLIRP have caps and deductibles.
  - (SRFA/PAC) Site Rehabilitation Funding Agreement/ Petroleum Advanced Cleanup have cost share agreements may have caps and ceilings.
  - Note: It's the responsibility of the site manager to track site funds.

#### Going over the cap is bad.



#### PO STATUS

- Determine if there is an open PO:
  - Review Oculus, STCM and Ariba on Demand (AOD).
  - Determine where we are in the PO- what deliverables have been submitted and invoiced for:
  - Prepare a tracking strategy for the PO.
  - Determine cap balance in accordance with the open PO:
    - Review STCM and Cap To Date.
    - I've compared actual invoices in Oculus to STCM, Cap To Date, and my own tracking.
    - Remember: Utilities count towards cap.



## **EXAMPLE SITE STATUS TRACKING**

Aman Store- Former/ 409812158/I  Task 2 Field Notes and Permits due 6-23-23 (received 19-25-12 suproved 19-25-12 suprove	d to contractor & contractor accepted & I submitted response from contractor and discussed with Chris 6:22 submitted TA to Matt again & Matt approved & I –18–23),
Former/ 409812158/I  Task 2 Field Notes and Permits due 6-23-23 (received and approved 4-24-23, invoiced 4-26-23), Ta	• •
Task 2 Field Notes and Permits due 6-23-23 (received and approved 4-24-23, invoiced 4-26-23), Ta	• •
Interior Demant due 40.07.00/meetined 7.04.00 en manuel 7.05.00 (meetined 7.07.00.005) demand 7.05.00	124 2 174
Interim Report due 10-27-23(received 7-24-23, approved 7-25-23, invoiced 7-27-23, CPE done 8-7-	,
Victim 23)DONE/11-14-23 transferred to Team 6.	
2.0.18 Reasogest from Lazar Cockrete (9-1.19 BESD3.7 Lask 1 des 1-14-17 (proced 4-5-18), Tack 2 de Guertery, OMM de 6-5-18) (proced 4-5-18), Teach 3 Guertery, OMM de 6-5-18), Teach 3 Guertery, OMM de 6-5-18, Teach 3 Guer	p O&M, 6-1-18 e-mailed contractor about next 7-3-18 prepared TA GC785-020E and put all in approved 8-5, invoiced 8-7, retainage invoiced 8-15, 7 e-mailed Russ to put it up for auction/11-21-19
received dath SPI de. corrected data spin data data data data data data data dat	ded edits, which I did?2-5-20 896EBD: Task 1 3-21, CPE done 8-13-21/DONE/SCORE 88/2-23-21 9A329: Task 1 HASP due 10-28-21 (received 8- endation & contractor approved, 1-21-22 e- 29. accrowed for invoicing 8-1-22 invoiced 8-10-
22(DOMES-33-02 contractor can close out PO by Live 30 for MFMP migration, 4-26/22 presspite forces with Jav., Mixed, and Laurier Experted \$50 et sell, some angular day and a self-self-self-self-self-self-self-self-	received fully approved RAPMOD Approval Order, 111-2-22, CPE done 2-15)ONE/10-19-22 3-28-23 submitted Grant's PO questions to 1, 4-3 Matt, Tim, Natasha approved PR, 4-4
4-4-12 C1802E: Task 1 HASP and Pre-Drilling Notes and Permits due 7-7-23 (received HASP 4-6, ap	-
10-23, received and approved pre Remedial Action Construction (RAC) meeting notes 4-25-23, invoiced 4-27, 5-4	
received no cost General Use Permit ), Task 2 RA Interim Report and AS Builts due 12-29-23 (received and appro	•
deliverable 5-8-23, invoiced 6-12-23, received and approved second partial deliverable 6-2-23, invoiced 6-12-23, 6	
Archie's/ Owner: Michael Terrill: received 3rd partial deliverable, approved 6-27, invoiced 7-7-23), Task 3 RA Interim Report due 4-1-24, Task 2 RA	
409201474/ 850-971-5745/ Report due 7-1-24/5-24-23 Trenching RFC Fully Approved/5-25-23 contacted Duke Energy to set up account and	scheduled
ATRP miketerrillj@gmail.com hook up/11-14-23 transferred to Team 6.	A D 4248 talked to Count and be said it
sounds like the PDC is over and that I can dress adapt, Task to make sure three wear) another time extension MM 2 is not a reader stay of the pDC is over and that I can dress adapt memory. How the pDC is over and that I can dress adapt memory. How the pDC is over and that I can dress adapt memory. How the pDC is over and that I can dress adapt memory. How the pDC is over and that I can dress adapt memory. How the pDC is over and that I can dress adapt memory. How the pDC is over and that I can dress adapt memory. How the pDC is over and that I can dress adapt memory. How the pDC is over and that I can dress adapt memory. How the pDC is over and that I can dress adapt memory. How the pDC is over and that I can dress adapt memory. How the pDC is over and that I can dress adapt memory. How the pDC is over and that I can dress adapt memory. How the pDC is over and that I can dress adapt memory. How the pDC is over and that I can dress adapt memory. How the pDC is over and that I can dress adapt memory. How the pDC is over and that I can dress adapt memory. How the pDC is over and that I can dress adapt memory. How the pDC is over and that I can dress adapt memory. How the pDC is over and that I can dress adapt memory adapt memory. How the pDC is over and that I can dress adapt memory adapt memory. How the pDC is over and that I can dress adapt memory adapt memory adapt memory adapt memory. How the pDC is over a data adapt memory	to contractor, who approved & I prepared SPI sual NAM due 9-5-19 (received 7-10, approved at TA and I forwarded all to essible RAPMOD, 8-31-21 e-mailed contractor series, 3-25 contractor approved revised PO & I ed it to contractor, 7-28-22 finished final PO drafts,
The semant drop pattern patter	he AS/SVE or BS
agreed to continue with a RAPMOD PO and no confirmatory soil sampling because it was excavated, 3-10-22 indinited date PO to contenter A contenter approach date, 3-10-22 indinited date PO to contenter A contenter approach date, 3-10-22 indinited date PO to contenter A contenter approach date, 3-10-22 indinited date PO to contenter A contenter approach date, 3-10-22 indinited date PO to contenter A contenter approach date, 3-10-22 indinited date PO to contenter A contenter approach date, 3-10-22 indinited date PO to contenter A contenter approach date, 3-10-22 indinited date PO to contenter A contenter approach date, 3-10-22 indinited date PO to contenter A contenter approach date, 3-10-22 indinited date PO to contenter A contenter approach date, 3-10-22 indinited date PO to contenter A contenter approach date, 3-10-22 indinited date PO to contenter A contenter approach date, 3-10-22 indinited date PO to contenter A contenter approach date, 3-10-22 indinited date PO to contenter approach date approach	#E to Grant,3-15 submitted revised TA to Grant, 3-1 3-30-23).
Task 2 NAM due 9-1-23 (received and approved 5-15-23, invoiced 5-19-23), Task 3 Pre-RAP-RA Interim Report due	•
Task 4 RAP due 3-1-24, Task 5 Construction Drawings and RAC due 5-3-24, Task 6 RFC NAM due 9-11-23 (receive	·
approved 8-25-23, invoiced 8-31-23)/Per the 5-15-23 e-mail the contractor is going to submit a RFC for a quarter of	of NAM
Dutton Auto because the levels dropped so much, 5-18-23 contractor submitted NAM RFC, 5-24 NAM RFC fully approved/8-25	5-23 NAM
Parts/20920 report was still above CTLS so we'll continue with the current PO/11-14-23 transferred to Team 6/11-27-23 e-maile	ed time
1730/ATRP extension RFC to Blake on Team 6.	



## CAP TRACKING EXAMPLE

FAC ID: 338509757						
	PO Number	Invoice	PO Number	Invoice	PO Number	Cap Minus
Thompsons Gas Station	PO B368FA	Due	PO B68217	Due	B96C32	Invoice
	Amount/CO	Date	Amount	Date	Amount	Totals
PO Cost	\$19,791.81		\$13,684.90		\$9,060.70	\$1,200,000.00
Invoice	-\$5,978.03	1/21/24	-\$3,498.37	1/24/24	-\$4,060.70	-\$295,170.50
Balance	\$13,813.78		\$10,186.53	8	\$5,000.00	\$904,829.50
Invoice	-\$172.57	2/22/24	-\$4,319.13	<b>S</b>		-\$89,181.52
Balance	\$13,641.21		\$5,867.40		\$5,000.00	\$815,647.98
Invoice	-\$6,121.71					-\$78,109.10
Balance	\$7,519.50		\$5,867.40		\$5,000.00	\$737,538.88
Invoice						-\$51,336.10
Balance	\$7,519.50		\$5,867.40		\$5,000.00	\$686,202.78
Invoice						-\$59,757.68
Balance	\$7,519.50		\$5,867.40		\$5,000.00	\$626,445.10
Invoice						-\$21,531.08
Balance	\$7,519.50		\$5,867.40		\$5,000.00	\$604,914.02



# SITE HISTORY AND FILE REVIEW CONTINUED

- Contamination history: Review previous assessment and remediation docs (Oculus):
  - Current cleanup status.
  - Contamination source(s).
  - Contamination horizontal and vertical delineation.
  - Hydrology and geology information.
  - Tank status.
  - Site assessment history.
  - Remediation history.

I review from the most recent documents chronologically.



# SITE HISTORY AND FILE REVIEW CONTINUED

- Contact owner/RP:
  - Confirm Site Access Agreement and compare to property appraiser.
  - Verify if owner/RP requested involvement.
  - Discuss cleanup strategies.
  - Discuss eligibility status: EDI, ATRP, PCPP, PLIRP, SRFA, etc..
  - Discuss cap amount (if applicable).
  - Discuss closure options.
  - Conduct site visit.



#### **CLEANUP STRATEGY**

- Discuss cleanup strategy with team, contractor (if assigned) and owner/RP.
- Determine appropriate SOW for next phase of work.
- Evaluate Risk Management Options (RMO I, II, II).
- Site-specific considerations:
  - o School.
  - Hospital.
  - o Playground.
  - o Historic sites.
  - Florida Department of Transportation (FDOT) site.



#### **CLEANUP STRATEGY**

- Discuss cleanup strategy with team, contractor (if assigned) owner/RP.
- Determine appropriate SOW for next phase of work.
- Evaluate RMO I, II, II.
- Site-specific considerations:
  - School.
  - o Hospital.
  - o Playground.
  - o Historic sites.
  - o FDOT site.



- Prepare Draft Attachment B/Schedule of Pay Items (SPI) and Draft Attachment A/SOW:
  - Discuss with team and contractor.
  - Discuss with RAC coordinator (if applicable)
  - Bottom line- four eyes are better than two.
  - Acquire needed quotes from contractor: See new quote form (next slide).
  - Prepare SOW package:
    - Attachment B (SPI).
    - Site Access Agreement.
    - Quotes.
    - Applicable tables and figures. For example, new well locations figure.



# **QUOTE FORM**

template or fix documentation  Faci 9-Digit Fa Facility  Quote Re PRP C Contracto Contract	Florida required to submit a quote to the Petroleum Restoration Program (PR ixed rate schedules. To be considered, standardized quotes must be on as needed. Please see instructions tab for more details. NOTE: A iiity Name: acility ID #: Address: equested by Contractor: or Contact: tor Phone:	submitted concurrently to the site manager and the requestir	ng contractor lis	ted below, along	g with any backup		
Site Mana	sger Name: ger Phone: sger Email:						
Item#	Item Description	Unit of Measure	Qty	Price	Extended Price	Hide/Show Rows	
					\$ - \$ -		
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				Subtotal:	\$ - \$ -		
	tACTOR: By submitting this form, the subcontractor attests that they a iitted By (update if other than person(s) listed in the header);	re not a related party to the PRP Contractor that requested the q		g & Handling: Tax: Total:	\$ -		
Subcontractor Subcontr Subcont	* ContactTifle: tractor Phone: tractor Email:	Quote Expiration Date (recommend 3 months or more)					
	a very broad public records lawand any communications to o upon request. Please do not include any confidential or propri		records and w	ill be made ava	ailable to the public		



- 1) Schedule a pre-RAP teleconference. Prepare a Site Summary Package in accordance with section 4.1 of the PRP Standard Specifications (SPI line item 19-24 is allowed for the preparation of the Site Summary Package). The Site Summary Package shall be submitted at least seven days prior to the pre-RAP teleconference. Conduct pre-RAP teleconference (one hour each has been allowed for the P.E. (21-1) and scientist/technical specialist (20-6) to participate in the teleconference)). Prepare and submit pre-RAP teleconference notes within three days following the teleconference that documents the conference was conducted, the parties who participated, a summary of the conclusions, along with the conceptual design summary.
  - **a. RAC SOW/SPIs** allow four hours for the engineer (20-3) and one hour for the P.E. (21-1)
  - **b. Source Removal (SR) SOW/SPIs** allow three hours for the engineer and one hour for the P.E.

- 2) Conduct an on-site pre-drilling meeting. Submit field meeting notes to include date, start and end time, list of participating parties, confirmation by the ATC that PO recognizes the SOW prior to field activities, summary of conclusions and recommendations.
  - a. One mobilization and one hour (SPI 20-6) has been allowed for each the ATC and driller to attend the pre-drilling meeting.



- 3) If you are not tasking a drilling meeting, please include the statement:
  - a. All parties are in agreement that a pre-drilling meeting is not needed because recent drilling has been performed on (date) or site conditions were verified at the completion of the last field event on (date).
- **4) Photographic documentation of the inside of the drums** is required to ensure drums are filled to 75% capacity per industry standards.
  - a. Note: You do not need this statement if there is only one drum per PO and RFC.
- 5) Contingent funding in this task is only to be used to offset the cost for pay items associated with a Field Request for Change for any open task.
  - a. Note: This must be included in the final PO task if the PO is for any type of field work.



- 6) Perform a File Review and submit a Comprehensive Historical Site Summary with the compilation of all historic data in accordance with the PRP Guidance for Cumulative Historic Data Compilation dated 08/26/21. An allowance of four hours (two hours each at the scientist/technical specialist rate (20-6) and administrative rate (20-10)) have been given for the compilation of all historic data into cumulative analytical summary tables using the standardized Soil and Groundwater Analytical Tables located on the PRP Assessment Guidance webpage.
- 7) Performing Site Reconnaissance/Field Measurement visit:
- Site Reconnaissance Field Meeting Notes to include area survey table, location map, area map, site map and photo documentation.
  - a. Note: They get a separate mob for this, the mob is **not** included in the Site Recon line item.



- 8) Please note that per the DEP site access agreement, a separate site access agreement between the owner and the ATC has been requested by the PO or tenant. Submit an email or letter (copying the owner or tenant) indicating that either that this separate site access agreement has been executed or that the owner no longer wants such agreement with the contractor (in other words, the owner is content with the DEP site access agreement). DEP does not need a copy of this agreement.
  - a. This only applies when the owner/RP requests a separate site access agreement in the Site Access Agreement.



#### **SOW CONTINUED**

- Generate SPI Quantities in STCM.
- Start technical review: Place SOW package in team folder for review.
- Receive offer acceptance e-mail from contractor:
  - Negotiate cost changes as needed and update Attachment B (SPI).
  - Update Attachment B with contingent funding: See Contingent Funding Memo.
  - Determine if quotes are needed and update Attachment B (SPI).
- Prepare Task Assignment (TA) in STCM:
  - Priority code in top righthand corner.
  - E-mail TA to Quality Assurance (QA)/Quality Control (QC) representative.
  - E-mail TA to PRP.Taskassignment and include in the subject line designation (Purchase Request (PR) Creator)).



#### **CONTINGENT FUNDING MEMO**

#### FIELD REQUEST FOR CHANGE IMPLEMENTATION (Revised 11/21/19)

The Field Request for Change (FRFC) process outlined in this updated guidance document is effective November 21, 2019. The regular FRC process, the rush RFC process, and the no cost RFC process remain the same.

In order to allow FRFCs to be processed during field activities and to reduce the number of remobilizations that may occur, a contingency pay item will be added to the Schedule of Pay Items (SPI) of the PO. The use of the contingent funding can only be used to offset the changes to a net zero (\$0.00) total amount for the FRFC and can only be authorized for activities while the contactor is in the field.

The FRFC process does not require approval from the Team Leader or PRP accounting prior to authorizing the contractor to complete the work, as these funds are already approved in the original PO. Note, new site managers and some other site managers may need an additional signature from their mentor, PE/PG, AR, or Team Leader, but this determination will be made within the Team or LP. See 'Field Change Order Process' guidance document for complete instructions located on the PRP Templates. Forms, Tools and Guidance webpage.

#### New POs

amount accordingly.

Prior to preparation of the Task Assignment, site managers add the contingent funding amount to the last task of the SPI SOW Units tab in the SPI workbook under Pay Item 23-1 "Contingent Funding" and add the following statement to that Task Description in the Scope of Work (SOW).

"Contingent Funding in this task is only to be used to offset the cost for pay items associated with a Field Request for Change for any open task."

The amount of Contingent Funding is based on the phase of work in the following table:

Sub-Phase	Contingent Amount (\$)
LSA	\$5,000
NAM	\$1,000
PARM	\$1,000
PT	\$1,000
O&M	\$3,000
RAC	\$7,000
RAP	0.00 unless there is field activity then 1,000
SA	\$5,000
SR	\$7,000
WASC	\$1,000

- If the PO has multiple phases, then only the highest contingent amount for the phase in the PO is added as contingent funding. Amounts cannot be stacked.
  - Examples: A SA would get \$5,000 Contingent Funding
     A PT would get \$1,000 Contingent Funding
     A Scope for SA and PT would get \$5,000 (the higher of the two without stacking)
- Contingent funding is not optional and should be added to all Purchase Orders. If there is not enough money left in the cap for the FRFC maximum, then the site manager must adjust the FRFC
- The contingent funding amount will not count toward the \$325K eQuote threshold:
  - Example: SOW is \$329,000 which includes \$7,000 in contingent funding. This site would NOT go thru the eQuote process because the actual SOW is \$322,000.

- AOD notification to review and approve PR:
  - Review and notify PRP contracts if changes need to be made.
- AOD PO approval:
  - Multiple AOD notifications as the PO goes through approval process.
  - AOD PO fully approved notification.
  - Update deliverable due dates in STCM.



#### **DELIVERABLES**

- Field work begins per the approved PO.
- Review deliverables and technical docs:
  - Scan deliverable to Oculus, update STCM (Jack does this immediately).
  - Deliverable due dates should be met.
  - Compare invoice rate sheet (SPI) with deliverable.
  - Submit comments if applicable.
  - Issue acceptance letter with signed and dated rate sheet (SPI) and statement:
    - I, Jack Roberts, certify that I am the contract manager, and the provided information is true and correct; the goods and services have been satisfactorily received and payment is now due. I understand that the office of the state's Chief Financial Officer reserves the right to require additional documentation and/or to conduct periodic post-audits of any agreements.



#### **DELIVERABLES**

- Review deliverables and technical docs:
  - Issue acceptance letter with signed and dated rate sheet (SPI) and statement:
    - I, Jack Roberts, certify that I am the contract manager, and the provided information is true and correct; the goods and services have been satisfactorily received and payment is now due. I understand that the office of the state's Chief Financial Officer reserves the right to require additional documentation and/or to conduct periodic postaudits of any agreements.
  - E-mail/mail review letter to contractor and owner/RP.
  - Track due dates: Outlook calendar and your own tracking.
  - Withhold retainage for late deliverables and affects contractor evaluations.

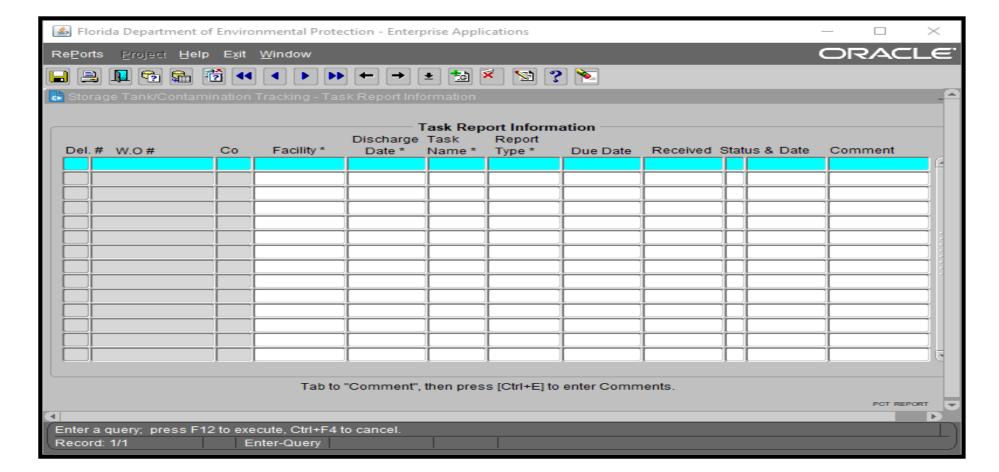


## **TURNAROUND TIMES**

REPORT TYPE ID	DESCRIPTION	Goal
BORE LOG	BORING LOGS	5
COC	CHAIN OF CUSTODY	5
FIELD	FIELD NOTES	5
GW LOG	GROUNDWATER SAMPLING LOGS	5
HASP	HEALTH AND SAFETY PLAN	5
LAB REPT	LABORATORY REPORT	5
MAPTABLE	MAP AND/OR TABLE	5
OTHER	OTHER REPORT TYPE	5
PHOTOS	PHOTO DOCUMENTATION	5
PROPERTY	PROPERTY REPORTING FORM	5
SUBINV	SUB INVOICE (INTERIM ONLY)	5
WELL LOG	WELL LOGS	5
ACCESS	SITE ACCESS AGREEMENT	15
DISP MAN	DISPOSAL MANIFEST	15
INTERIM	INTERIM REPORT	15
LCARA	LIMITED CONTAMINATION ASSESSMENT REPORT ADDENDUM	15
LSSI RPT	LOW SCORE SITE INITIATIVE REPORT	30
MAIN TARG	MAINTAIN TARGET LEVELS	15
MILESTONE	MILESTONE REPORT	15
MOP	MONITORING ONLY PLAN	30
NA ANNUAL	NA ANNUAL REPORT	15
NA QTR	NA QUARTERLY REPORT	15
NA SEMI	NA SEMI ANNUAL REPORT	15
NA TRI	NA TRI ANNUAL REPORT	15
PBC 50	50% REDUCTION	15
PBC 75	75% REDUCTION	15
PBC 90	90% REDUCTION	15
PBC START	SYSTEM STARTUP (PBC)	15
PRAMANN	POST RA MONITORING ANNUAL REPORT	15
PRAMQRTLY	POST RA MONITORING QUARTERLY REPORT	15
PRAMRSEMI	POST RA MONITORING SEMI ANNUAL REPORT	15
PROPOSAL	PROPOSAL	15
RA LETTER	REMEDIAL ACTION LETTER REPORT	15
RESPONSE	RESPONSE TO NON TECHNICAL COMMENTS	15 15
SARA	SITE ASSESSMENT REPORT ADDENDUM	15
SSA TARGETS	SUPPLEMENTAL SAR (NOT A RESPONSE TO COMMENTS)	15
TECH RESP	RESPONSE TO TECH COMMENTS (NOT RAP OR SA)	15
VSR	VERIFICATION SAMPLING REPORT	15
WABAND	WELL ABANDONMENT REPORT	15
WEIGH	WEIGH TICKETS	15
AS BUILT	AS BUILT DRAWINGS	30
BID PACK	BID PACKAGE	30
CLOSREPT	CLOSURE REPORT	30
CONS DRAW	CONSTRUCTION DRAWINGS	30
ERA	EVALUATION OF REMEDIAL ALTERNATIVES	30
FREEPROD	FREE PRODUCT REMOVAL REPORT	30
GEN RA	GENERAL REMEDIAL ACTION REPORT	30
LCAR	LIMITED CONTAMINATION ASSESSMENT REPORT	30
LETTER	LETTER REPORT	30
NAP1	LEVEL 1 NATURAL ATTENUATION MONITORING PLAN	30
NAP2	LEVEL 2 NA MONITORING PLAN WITH MODELING	30
NFAP	NO FURTHER ACTION PROPOSAL	30
NPDES	NPDES DMR	30
O&MANN	ANNUAL O&M REPORT	30
O&M QRT	QUARTERLY O&M REPORT	30
PILOTPLAN	PILOT TEST PLAN	30
PILOTREPT	PILOT TEST REPORT	30
PRAMP	POST REMEDIAL ACTION MONITORING PLAN	30
RAPA	RAP ADDENDUM	30
RAPM	REMEDIAL ACTION PLAN MODIFICATION	30



- Scan review letter to Oculus.
- Update deliverables received in STCM (task reports).



- Track invoice due dates.
  - Outlook calendar.
- Friendly reminder but if late it affects contractor evaluation.
- Track sites with funding caps or ceilings.
- Check "Cap To Date."
- https://prodlamp.dep.state.fl.us/www\_stcm/reports/CapToDate.
- Contractor has 30 days to submit invoice from the deliverable review letter date.

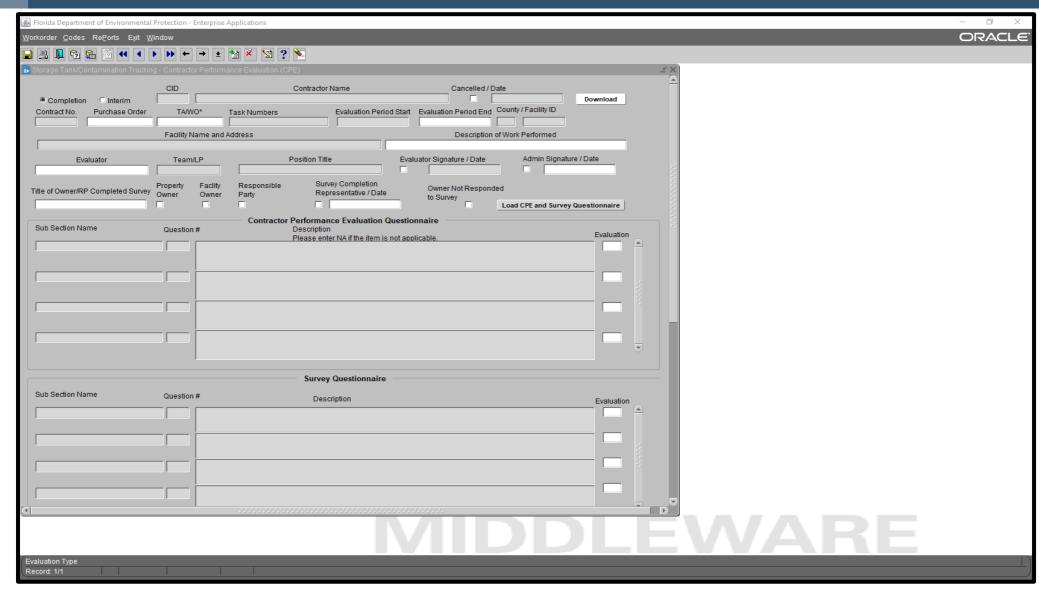


# CONTRACTOR PERFORMANCE EVALUATIONS

- Complete CPE:
  - Contact owner/RP.
  - Complete evaluation in STCM.
  - Should be completed as soon as possible.
  - Must be completed within 30 days of final invoice approval.



## STCM PERFORMANCE EVALUATION





#### **FUNDING CAP**

- Site manager's responsibility to track funds.
- Site manager AOD PO comment:
  - Discharge ATRP eligible with no CAP attached documents have been reviewed and are correct.
  - Discharge PLRIP (\$300,000 CAP) attached documents have been reviewed and are correct and the \$47,256.12 remaining funds in the CAP are adequate to cover the costs in this PO.
  - Discharge PLRIP (\$300,000 CAP) and another PLRIP (\$400,000 CAP) and the plumes are mingled. The attached documents have been reviewed and are correct and the \$576,423.17 remaining funds are adequate to cover the costs in this PO.



#### FIELD WORK NOTIFICATION

- Contractor must give at least a seven-day notice.
- Owner must be notified by contractor.
- Notify PRP inspector.



### PRE-DRILLING MEETINGS

- Pre-drilling meetings:
  - Are normally in-person on-site.
  - May be held via teleconference or canceled, if applicable, and all parties agree:
    - Need documentation that all agreed: contractor, driller and owner.
    - There is specific language for Attachment A for this.
  - There are approved pay items for the meeting:
    - Line item 3-1, 3-2 for mobilization, 2-1 for site recon (if applicable), 20-6 hourly rate.
  - There is specific language for Attachment A.



## REQUEST FOR CHANGE (RFC)

- Header fields should match PO.
- Description of change should be clear and concise, with enough detail.
- Refer to attached Attachment A tables, figures, etc. in description.
- Hide rows.
- Use correct naming conventions.
- See guidance docs:
  - https://floridadep.gov/waste/petroleum-restoration/content/templates-formstools-and-guidance



## TRACKING AND SITE FILE MANAGEMENT

- Site management file:
  - Current PO and supporting docs.
  - Previous POs and supporting docs use these for comparisons.
  - Funding Cap Tracking Spreadsheet.
  - Utility Tracking Spreadsheet.
  - Site Status Spreadsheet.
  - E-mail file.
  - o Phone logs.



# COMMUNICATING WITH THE OWNER/RP

- Site visits.
- Pre-drilling meetings.
- Phone and e-mail correspondence.
- Communication logs.



## **COMMUNICATING WITH CONTRACTOR**

- Teleconferencing: Verify with e-mail.
- E-mail: Be conscious of content and purpose.
- Save all pertinent e-mails and upload to OCULUS.
- Site meetings.
- Office meetings.
- Document all pertinent communication.



#### JACK'S SITE PROCESS

- Set up site file:
  - Current PO.
  - Site Status Spreadsheet.
  - Funding Cap Spreadsheet, if applicable.
  - E-mail file.
- Current PO:
  - Determine what deliverables have been approved and invoiced.
- Determine cap balance, if applicable:
  - Cap to Date.
  - o STCM.



### JACK'S PROCESS CONTINUED

- o AOD.
- o Oculus.
- Enter cap information into spreadsheet, including utility tracking.
- Notify contractor that I am the site manager.
- Perform site review.
- Contact owner/RP.



## **EXAMPLE SITE STATUS TRACKING**

		11-15-21 transferred from AndreweSCCCK: HASP & RA General Report due 2-5-22 (proceived 10-25-21, approved 11-5-21, invoked 11-17-21, DONE, CPE done 12-6/17-21-22 submitted RA (regort & RAP) per the recommendations to John, sent to John again 3-16-22-3-2-2-2 talked to new owner, Tony Chambers (850-363-4063)/4-5-22 received new site access
Aman		agreement/.1-16-22 entailed contractor: recommendations for a root of sensing. Approved in 16-12, incident of 16-12, incident o
Store-		protect PRIMADA, 127 Laza & Maria approved. 12.122 Sammila de 1900 and 1900
Former/		Notes and Permits due 6-23-23 (received and approved 4-24-23, invoiced 4-26-23), Task 3 RA Interim Report
409812158/I		due 10-27-23 (received 7-24-23, approved 7-25-23, invoiced 7-27-23, CPE done 8-7-23) DONE/11-14-23
nnocent Victim		transferred to Team 6.
VICUIII		LIGHTSIGHT U.U IGAIII O.  42/18 Reassignet from Laur Custom's 6-17/18 (procised 45-18), Track 2 and Quarterly QBM dae 6-5-18 (procised 45-18), Track 2 and QBM dae 6-5-18 (procised 45-18), Track 2
		Grant approved TA, 76-18 (last) approved PA,
		29-23 submitted TA GC785-000U to Grant, 3-30-23 Grant approved TA, 3-30-23 Grant approved TA, 3-30-23 Matt approved TA and I submitted all to PRPteskassingment, 4-3-23 submitted Tim's revisions to Julie, 4-3-23 Julie updateded revised docs & I approved PR applin, 4-3-23 Tim needed another revision which I submitted to Julie & Tim approved PR, 4-4 submitted revised quade to Megan, 4-4 Samilka approved PR, 4-5 Samilka a
		1 HASP and Pre-Drilling Notes and Permits due 7-7-23 (received HASP 4-6, approved 4-10-23, received and approved pre-RAC
		meeting notes 4-25-23, invoiced 4-27, 5-4-23 received no cost General Use Permit ), Task 2 RA Interim Report and AS Builts
		due 12-29-23 (received and approved partial deliverable 5-8-23, invoiced 6-12-23, received & approved second partial
Archie's/	Owner: Michael Terrill:	deliverable 6-2-23, invoiced 6-12-23, 6-26-23 received 3rd partial deliverable, approved 6-27, invoiced 7-7-23 ), Task 3 RA Interim
409201474/	850-971-5745/	Report due 4-1-24, Task 2 RA General Report due 7-1-24/5-24-23 Trenching RFC Fully Approved/5-25-23 contacted Duke
ATRP	miketerrillj@gmail.com	Energy to set up account and scheduled hook up/11-14-23 transferred to Team 6.
		46-18 Reassigned from Laura Contramit2-8-2011 PBC WO GC722-0320. (Millestone 1 82% project regions of 3-410, Millestone 2 53 but no feet to 2-410, Millestone 2 53 but no feet to 2-410, Millestone 3 53 but no feet to 2-410, Millestone 5 53 but no feet to 2-510, Millestone 5 54 but no feet to 2-510,
		PRobassing with a state of the contract of the
		PRINTING 3-22 Card & Matt approved 3-30-23), Task 2 NAM due 9-1-23 (received
		and approved 5-15-23, invoiced 5-19-23), Task 3 Pre-RAP-RA Interim Report due 12-1-23, Task 4 RAP due 3-1-24, Task 5
Dutton		Construction Drawings and RAC due 5-3-24, Task 6 RFC NAM due 9-11-23 (received and approved 8-25-23, invoiced 8-31-
Auto		23)/Per the 5-15-23 e-mail the contractor is going to submit a RFC for a quarter of NAM because the levels dropped so much,
Parts/20920		5-18-23 contractor submitted NAM RFC, 5-24 NAM RFC fully approved/8-25-23 NAM report was still above CTLS so we'll
1730/ATRP		continue with the current PO/11-14-23 transferred to Team 6/11-27-23 e-mailed time extension RFC to Blake on Team 6.



# CAP TRACKING EXAMPLE

FAC ID: 338509757						T
	PO Number	Invoice	PO Number	Invoice	PO Number	Cap Minus
Thompsons Gas Station	PO B368FA	Due	PO B68217	Due	B96C32	Invoice
	Amount/CO	Date	Amount	Date	Amount	Totals
PO Cost	\$19,791.81		\$13,684.90		\$9,060.70	\$1,200,000.00
Invoice	-\$5,978.03	1/21/24	-\$3,498.37	1/24/24	-\$4,060.70	-\$295,170.50
Balance	\$13,813.78		\$10,186.53		\$5,000.00	\$904,829.50
Invoice	-\$172.57	2/22/24	-\$4,319.13			-\$89,181.52
Balance	\$13,641.21		\$5,867.40		\$5,000.00	\$815,647.98
Invoice	-\$6,121.71					-\$78,109.10
Balance	\$7,519.50		\$5,867.40		\$5,000.00	\$737,538.88
Invoice						-\$51,336.10
Balance	\$7,519.50		\$5,867.40		\$5,000.00	\$686,202.78
Invoice						-\$59,757.68
Balance	\$7,519.50		\$5,867.40		\$5,000.00	\$626,445.10
Invoice						-\$21,531.08
Balance	\$7,519.50		\$5,867.40		\$5,000.00	\$604,914.02



# OPERATION AND MONITORING (O&M) EXAMPLE

Attachment A

#### **Petroleum Restoration Program** Scope of Work 9-Digit Facility ID Number: 628517141 STCM Facility Name: Chevron-Armstrongs-Main Street SubPhase(s): O&M Specifications All work must be performed in accordance with this Scope of Work (SOW) and any attachments, Chapters 62-160, 62-532, 62-777 and 62-780, F.A.C., all applicable FDEP and Water Management District guidance memoranda, standard industry procedures and as described in the Agency Copies of all referenced guidelines are available at: http://floridadep.gov/waste/petroleum-restoration Reports must be submitted using the appropriate FDEP forms found at: http://floridadep.gov/waste/petroleum-restoration/content/procedures-guidance-documents All work must be conducted in accordance with PRP Standard Specification Details found at: http://floridadep.gov/waste/petroleum-restoration/content/templates-forms-tools-and-guidance The following tables are included as attachments to this SOW and further represent the details of the scope of work. Water Sampling Table Soil and Air Sampling Table O&M (System) Parameters Table Task 1 Description: Prepare and submit an updated Site Health & Safety Plan. Task 1 Deliverable: Site Health & Safety Plan for Continued Work (no cost to FEP) Task 1 Deliverable Due Date: Friday, March 31, 2023 Task 2 Description: Conduct operations and maintenance activities. Prepare and submit a Quarterly O&M Task 2 Deliverable: Operation & Maintenance Report, Quarterly or Non-Annual Task 2 Deliverable Due Date: Friday, June 30, 2023 Task 3 Description: Conduct operations and maintenance activities. Prepare and submit a Quarterly O&M Task 3 Deliverable: Operation & Maintenance Report, Quarterly or Non-Annual Task 3 Deliverable Due Date: Friday, September 29, 2023 Task 4 Description: Conduct operations and maintenance activities. Prepare and submit a Quarterly O&M Task 4 Deliverable: Operation & Maintenance Report, Quarterly or Non-Annual Task 4 Deliverable Due Date: Friday, December 29, 2023 Task 5 Description: Conduct operations and maintenance activities. Prepare and submit an Annual O&M Report. Contingent Funding in this task is only to be used to offset the cost for pay items associated with a Field Request for Change for any open task Task 5 Deliverable: Operation & Maintenance Annual Report Task 5 Deliverable Due Date: Friday, March 29, 2024 PO End Date: Tuesday, May 28, 2024 Schedule of Pay Items (SPI) All unit rates and extended prices for all line item costs associated with this project are provided in the SPI [Attachment B to this Purchase

Attachment A (SOW Template)

Order (PO)] and shall not exceed the rates established in the ATC.

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# POST ACTIVE REMEDIATION MONITORING (PARM) ATTACHMENT A EXAMPLE

#### Attachment A Petroleum Restoration Program Scope of Work

9-Digit Facility ID Number: 378510363

STCM Facility Name: Pugs Beer & Wine

#### SubPhase(s): PARM

#### Specifications

All work must be performed in accordance with this Scope of Work (SOW) and any attachments, Chapters 62-160, 62-532, 62-777 and 62-780, F.A.C., all applicable FDEP and Water Management District guidance memoranda, standard industry procedures and as described in the Agency Term Contract (ATC).

Copies of all referenced guidelines are available at

http://floridadep.gov/waste/petroleum-restoration

Reports must be submitted using the appropriate FDEP forms found at:

http://floridadep.gov/waste/petroleum-restoration/content/procedures-guidance-documents

All work must be conducted in accordance with PRP Standard Specification Details found at:

http://floridadep.gov/waste/petroleum-restoration/content/templates-forms-tools-and-guidance

The following tables are included as attachments to this SOW and further represent the details of the scope of work.

✓ Water Sampling Table

Task 1 Description:	Submit an updated Health & Safety Plan.
Task 1 Deliverable:	Site Health & Safety Plan for Continued Work (no cost to FDEP)
Task 1 Deliverable Due Date:	Thursday, March 31, 2022
Task 2 Description:	Perform groundwater sampling. Submit a PARM Report.
Task 2 Deliverable:	Natural Attenuation or Post Monitoring Report, Quarterly or Non-Annual
Task 2 Deliverable Due Date:	Tuesday, May 31, 2022
Task 3 Description:	Perform groundwater sampling. Submit a PARM Report.
Task 3 Deliverable:	Natural Attenuation or Post Monitoring Report, Quarterly or Non-Annual
Task 3 Deliverable Due Date:	Wednesday, August 31, 2022
Task 4 Description:	Perform groundwater sampling. Submit a PARM Report.
Task 4 Deliverable:	Natural Attenuation or Post Monitoring Report, Quarterly or Non-Annual
Task 4 Deliverable Due Date:	Wednesday, November 30, 2022
Task 5 Description:	Perform groundwater sampling. Submit a PARM Report. Contingent Funding in this task is
	only to be used to offset the cost for pay items associated with a Field Request for Change
	for any open task.
Task 5 Deliverable:	Natural Attenuation or Post Monitoring Report, Annual
Task 5 Deliverable Due Date:	Tuesday, February 28, 2023
PO End Date:	

#### Schedule of Pay Items (SPI)

All unit rates and extended prices for all line item costs associated with this project are provided in the SPI [Attachment B to this Purchase Order (PO)] and shall not exceed the rates established in the ATC.

#### Requests for Change (RFC)

All requests for changes to the SOW must be submitted in writing and be approved in writing by the FDEP/LP using the RFC form in accordance with paragraphs 2.A and 26 of the ATC and can be found at:

http://floridadep.gov/waste/petroleum-restoration/content/templates-forms-tools-and-quidance

Any change which results in an extension of the due dates, PO end date, or a change in quantities or costs, requires that a PO Change Order be formally issued prior to performance of the revised SOW.

Attachment A (SOW Template)

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# REFERENCES

- Oculus.
- STCM.
- Current Technical Non-Orders and Current Technical Orders (review letters etc..).
  - BPSS V Drive.
  - PRP B Drive/BPSS folder/COMMON folder/FORMS AND LETTERS folder.
- Link to site manager templates, forms, tools and guidance:
  - https://floridadep.gov/waste/petroleum-restoration/content/templates-formstools-and-guidance.
- Link to Standard Operating Procedures (SOP):
  - https://floridadep.gov/waste/petroleum-restoration/content/prp-site-managerstandard-operating-procedures-sop.

