

February 6, 2017

Consultant Fee Independent Cost Estimating Process - Florida DOT



Agenda

Overview of FDOT

Overview of Scope and Staff Hour Procedure

Overview of Scope and Staff Hour Estimation Tools

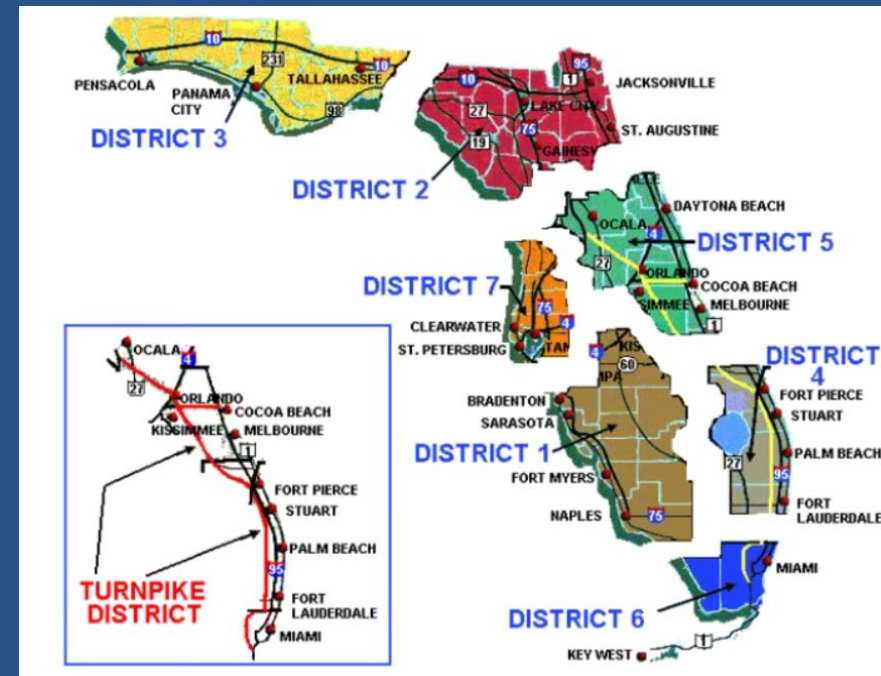
Review of Scope Development Process

Identification of Best Practices

Overview

Florida Department of Transportation

- Decentralized
 - 7 Districts + Florida Turnpike Enterprise
- \$10 Billion Annual Budget
- 6,500 Employees
- Approximately 90% of Design projects → Consultants



Procedure

STANDARD SCOPE and STAFF HOUR ESTIMATION GUIDELINES for PROJECT DEVELOPMENT and ENVIRONMENT (PD&E) STUDIES and DESIGN SERVICES

Department Procedure 375-030-020

- <http://www.fdot.gov/procedures/formsandprocedures.shtm>
- Requires the use of:
 - Standard Scope of Services
 - Staff Hour Estimation Guidelines
 - Staff Hour Estimation Forms

Procedure

STANDARD SCOPE and STAFF HOUR ESTIMATION GUIDELINES for PROJECT DEVELOPMENT and ENVIRONMENT (PD&E) STUDIES and DESIGN SERVICES

Department Procedure 375-030-020 (cont.)

- PURPOSE:
 - “The Department of Transportation (Department) employs consultant services for the purposes of PD&E Studies and Design Services. The Standard Scope and Staff Hour Estimation Guidelines is to provide guidance for efficient and uniform negotiations of these professional services contracts statewide. The Guidelines consist of the Scope of Services files, Staff Hour Forms and Staff Hour Estimation Basis. The purpose of this procedure is to implement the required use of the Standard Scope and Staff Hour Estimation Guidelines for Project Development and Environment Studies (PD&E) and Design services Projects.”

Scope & Staff Hour Estimation Tools

Project Management Web Page

- <http://www.fdot.gov/designsupport/Scope/>
 - Design Standard Scope of Services
 - Design Staff Hour Estimation Guidelines
 - Design Staff Hour Estimation Forms

Scope & Staff Hour Estimation Tools

Design Standard Scope of Services

- Standard Template for Scope of Services
- Developed by teams of FDOT and Consultant Personnel
 - Sub-Teams for each Discipline
- 37 Sections (Design Activities)
- Customized with project-specific information

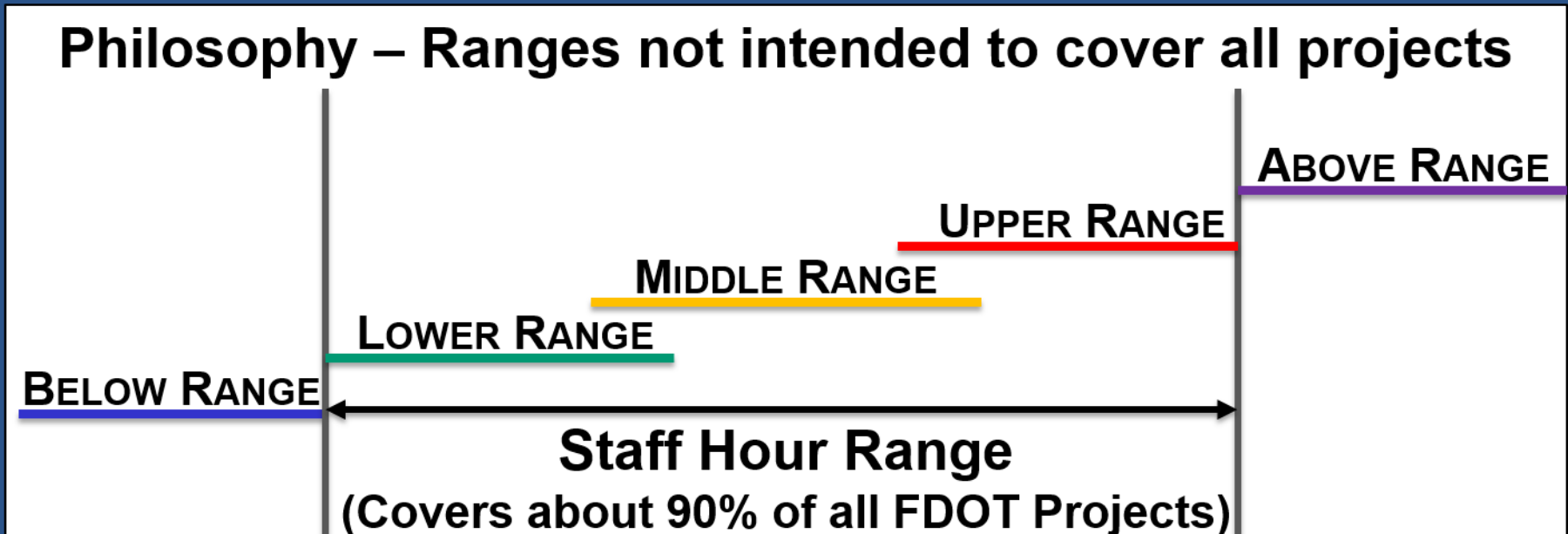
Design Staff Hour Estimation Guidelines and Forms

- Developed by teams of FDOT and Consultant Personnel
 - Sub-Teams for each Discipline (Same teams as for Scope)
- For estimation and negotiation of professional services contracts
- Tasks match Scope of Services Activities

Scope & Staff Hour Estimation Tools

Design Staff Hour Estimation Guidelines and Forms (cont.)

- Staff Hour Ranges for each task based on complexity
 - Neither Max nor Min (Applicable to 90% of projects)



- Staff Hour Estimation Forms to calculate hours

Scope & Staff Hour Estimation Tools

Design Staff Hour Estimation Guidelines and Forms (cont.)

	A	B	C	D	E
1	Structures - Summary of Miscellaneous Tasks & Drawings				
2	Task No.	Task	Units	Staff Hour Range	Basis for Staff Hour Range
3	9.1	Key Sheet and Index of Drawings	sheet	4 to 16	Prepare index sheet for all submittals. Low Range: single bridge. High Range: multiple bridges.
4	9.2	Project Layout	sheet	8 to 16	Required for multiple bridge projects. Range depends on complexity.
5	9.3	General Notes and Bid Item Notes	sheet	16 to 24	Includes general notes, bid item notes, surface finish details, etc. Range depends on complexity.
6	9.4	Miscellaneous Common Details	sheet	4 to 48	This task is only for use where it is necessary to provide for development of sheets with common details that will be applicable to multiple bridges on the same project.
		Incorporate Report of Core			Incorporate Report of Core Borings into project plans. Low Range: multiple

Scope & Staff Hour Estimation Tools

Design Staff Hour Estimation Guidelines and Forms (cont.)

Estimator:							Enter project name & description 999999-1-52-01	
Representing		Print Name				Signature / Date		
FDOT District X								
XYZ Consulting								
<i>NOTE: Signature Block is optional, per District preference</i>								
Task No.	Task	Units	Design and Production Staffhours				Comments	
			No. of Units	Hours per Unit	No. of Sheets	Total		
	General Drawings							
9.1	Key Sheet and Index of Drawings	Sheet	1	4	1	4		
9.2	Project Layout	Sheet	12	1	12	12		
9.3	General Notes and Bid Item Notes	Sheet	2	16	2	32		
9.4	Miscellaneous Common Details	Sheet	2	10	2	20		
9.5	Incorporate Report of Core Borings	Sheet	4	0.5	4	2		
9.6	Existing Bridge Plans	LS	1	6		6		

Scope Development Process

Process

- Develop Stage I Scope
- Advertise Project
- Receive Letters of Response
- Long & Short List
- Scope Meeting
- Develop Stage II Scope
- Receive Proposals
- Rank Firms
- Negotiate Staff Hours with #1 Firm
- Develop Stage III Scope
- Execute Contract
- Notice to Proceed to consultant

Scope Development Process

Stage I Scope

- Develop & coordinate initial detailed scope used for project advertisement
- FDOT PM prepare draft Risk Analysis
- The more detail the better

Stage II Scope

- Updated (more detailed) Scope
- Obtain discipline input
- Provided to short listed firms

Scope Development Process

Scope of Services Meeting For Shortlisted Firms

- Provide Stage II scope
- FDOT representative from each discipline provides clarification on the scope
- Consultant asks questions
- FDOT PM can amend Stage II Scope based on meeting and reissue Stage II Scope

Following Scope of Services Meeting

- Receive proposals
- Rank firms
- Notify Firms

Scope Development Process

Prepare for Negotiations

- FDOT and Selected Consultant Prepare Staff Hours
 - Based on Stage II Scope
 - Document assumptions in comments
- Scope Clarification Meeting with Selected Firm
 - FDOT and Consultant staff from all disciplines discuss scope
 - Scope changes based on info learned during selection process
 - Consultant is responsible to document scope changes
- Revise Staff Hours Based on Scope Clarification Meeting
 - FDOT and Consultant update staff hours
 - Update “Comments” as hours are updated
 - FDOT and Consultant exchange staff hours 2 to 3 days prior to start of negotiations

Scope Development Process

Negotiate Staff Hours

- PM Coordinates internal participation
- Follow FDOT Negotiations Handbook (Mutual Gains)
 - <http://www.fdot.gov/procurement/Negotiations.shtm>
- FDOT and Consultant sign-off
 - on staff hour sheets
 - on staff hour distribution for each discipline
- Consultant is normally responsible for updating Scope

Stage III Scope

- Coordinate & finalize scope after negotiations
- Final scope used in contract
- Notice to Proceed to consultant

Best Practices

Provide as much detail in Scope as possible

Make sure changes to Scope and/or Staff Hours are coordinated

Scope Clarification Meeting

- Consultant should have all subconsultants attend the meeting
- Consultant should take good notes

Staff Hours

- Make sure hours are accurate and defensible
- Don't "Double-dip" hours
- Use the Comments box and clearly state the basis for all hours
- Provide formula for hour calculations

Best Practices

Staff Hours (Cont.)

Four pavement designs (mainline, shoulders, resurfacing mainline, Meadow Pointe) (50 hours for initial, 8 hours for shoulder, 10 for resurfacing mainline and 12 for Meadow Pointe). 40 hours for Pavement Type Selection Report. Assume complete reconstruction of pavement.

Task No.	Task	Units	No of Units	Hours / Unit	Total Hours	Comments
4.1	Typical Section Package	LS	1	36	36	Typical section package approved 12/22/08 for 3 sections. Need three additional typical sections (EB slip ramp, WB lanes approaching Bypass, Meadow Pointe). 20 hours for 1st, 8 hrs for each other
4.2	Pavement Design Package	LS	1	120	120	Four pavement designs (mainline, shoulders, resurfacing mainline, Meadow Pointe) (50 hours for initial, 8 hours for shoulder, 10 for resurfacing mainline and 12 for Meadow Pointe). 40 hours for Pavement Type Selection Report. Assume complete reconstruction of pavement.
4.3			1	115	115	16 hours/mile. Driveway documentation is only required on driveways with work outside the ROW. Assume 10 driveways will require documentation booklet @ 4 hrs each.

$$=50+8+10+12+40$$

Summary

Overview of FDOT

Overview of Scope and Staff Hour Procedure

Overview of Scope and Staff Hour Estimation Tools

Review of Scope Development Process

Identification of Best Practices

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Thank You!

Questions???