

Session 31

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FL. Dept. of Transportation D4

District 4 - Estimates Process

Topic Description

Estimates process from lre to Official Estimate.

Speaker Biography

Started with the Dept. in 1977 as Asst. to the Dist. Bituminous Engr 5 Yrs. Moved to Dist. Office in Traffic Ops designing and drafting signals and pavt marking plans and then to Design for full construction plans. Assigned to Quality Control for review of construction plans (3 years). 1985 became Dist. Est. Engr. 2 YRS and then to Professional Svcs 10 Yrs. 1997-2006 Dist Est. Coordinator

FDOT District 4 Estimating Process

Introduction

In District 4, project cost estimates are reviewed and processed by the Final Plans Section (FPS) of the Program Management Office. When project plans, specifications and estimates (ps&e) are submitted for review, at whatever phase of project completion, the principal focus of the FPS is on quality assurance, to make sure

- a) that p,s & e match the intent and scope of the final facility being constructed
- b) that proper funding has been established, and available or encumbered
- c) Appropriate present day unit costs are used, from the FDOT estimating modules or elsewhere in the economic market area, to develop accurate long term and short term costs estimates for each project.

Main steps of the review process from Inception to Production Complete

- At the annual Work Program Kickoff, all projects are logged into a Log In Spreadsheet for update (scope and estimate) and review in light of budget and schedule

Deadlines for submittals of the LRE projects updates are established: for example

6/30 for projects in the current Fiscal Year (2005)

6/11 for FY 2006

5/28 for FY 2007

5/16 for FY 2008 through 2010

Periodic reminder letters are sent to Project Managers when submittal schedules fall behind

- Within the Adopted Year, projects are submitted at three phases :
Initial Engineering (45% project completion), Final Engineering (98%)
and Production Complete (100%)

Intitial Engineering Estimates :

Base on latest quantities and scope (usually latest LRE update)

Final Engineering Estimates

Based on Trnsport entries of quantities and current unit costs reflecting a more fully developed project scope, constructability and project duration considered

Production Complete Estimates:

Based on a fully developed project, including MOT quantities, Non-Bid items and accurate quantities and unit costs

LIFECYCLE OF THE ESTIMATE

DISTRICT FOUR

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- **ASSIGNMENT OF PROJECT NUMBER**
- **Description of work**
- **Project is assigned**
- **Project is assigned to the Department Manager**

➤ **FIELD REVIEW**

- **An LRE and scope history**
- **The LRE is reviewed and cost information is provided to the Work Program Office for updating**

➤ **YEARLY WORK PROGRAM REVIEW**

- **The unit prices**
- **Access to designated projects is then provided to project managers**
- **Project Managers then update their projects with new price information**
- **Project Managers then submit *scope history and LRES* to the Estimates Section based on specified time frames for submission**

➤ **PHASE REVIEWS AND SCOPE CHANGES**

- **Initial Engineering**
- **Final Engineering**
- **Major Scope Changes –**
- **Design Build –**
- **Lump Sum –**
- **FM Data**
- **Project manager is responsible for providing all cost information to meet scope required in the request for proposal in the design build projects**

➤ **LONG RANGE ESTIMATE TO TRNS*PORT PROCESS**

- **All projects to be let in the current fiscal year should be loaded into Trns*port**
- **Current year projects that are scheduled for 3rd and 4th quarter letting**
- **Project Managers should request the Estimates Section create/establish**
- **Project Managers are responsible for *verifying pay items***
- **The project managers may request the Estimates Section run their project through the CES Cost Barrels for initial cost estimate purposes.**
- **Project Managers must provide pay item cost information for *specialty cost items such as irrigation, utilities, decorative light poles, decorative brick pavers, specialty landscape plants/trees or any other non-standard item that may be required using a standard pay***

➤ **THE AUTHORIZATION ESTIMATE VS OFFICIAL ESTIMATE**

- **The authorization estimate is *after* production complete and is to update work program office on the latest cost information including factors with pay items that have been increased and due to other types of work included with the standard pay item. It also includes costs based on location and season**

➤ **POST BID AWARD ESTIMATE**

- **The post bid estimate deals with the official estimate versus the contractors low bid.**
- **This is to determine whether pay item costs are balanced or if quantities of associated pay items are correct.**
- **This may detect if there is an issue with the work associated with a pay item whether it is lower or higher than our**

➤ **CONTRACTORS BID ESTIMATE**

- The low bid contractor is contacted when the unbalance review reveals questions of individual pay items.
- We will phone the contractor and discuss our concerns. We will then try to determine if sufficient info was provided to award the contract.

➤ **FINAL ESTIMATE**

- **This is done by construction to determine the actual cost of the project which would indicate any over-runs or under-runs...**