



## Scoping Outside the Box



## Agenda

- What is the Box?
- What is considered Inside the Box?
- What is considered Outside the Box?
- How to Scope Outside the Box



# The “Box”



## Scope of Work vs. Scope of Services

### Scope of Work

Purpose and Need:

- Widen road
- Resurfacing
- Replace bridge



### Scope of Services

How to Accomplish Work:

- Roadway design
- Drainage design
- Structures design



## Standard Scope of Services



## Staff Hour Guidelines



# Scope/SH Statewide Task Teams

- Architecture
- Landscape Architecture
- Structures
- Geotechnical
- ITS
- Roadway
- Drainage
- Traffic Plans
- R/W Mapping
- Survey
- Utilities
- PD&E



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TRANSPORTATION**

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## Production Support

Production Support / Project Scope /

### Scope of Services and Staff Hour Estimation

**Scope of Services**

A Scope of Services is a contractual agreement between the Department and the chosen professional firm that requires input from many disciplines and coordination with several offices within the Department. The Department has developed a Standard Scope of Services for procuring PD&E services and Design services and guidelines for negotiating staff hours. These documents are to be used on each project and modified only with project specific information.

**Standard Scope of Services and Staff Hour Estimation Guidelines and Forms**

**Project Development and Environmental (PD&E)**

- PD&E Scope
- PD&E Staff Hour Estimation Guidelines
- PD&E Staff Hour Estimation Forms (excel format)



*Innovative Solutions for tomorrow's transportation needs*

# Inside The Box



## Project Scope of Services

### ***Making the Standard Scope of Services a Project Scope of Services***

Work tasks described in the Standard Scope **should be utilized "as is" to the maximum extent possible** and modified only when required to produce project or District specific results.



# Project Scope of Services

- Determine the Activities applicable to project
- Select the Tasks
- Fill in the Blanks
- Determine WHO is Responsible
- Provide Project Specific Information
- Provide District Specific requirements



# Inside or Outside the Box?

- 3D Design?
- Community Aesthetic Features?
- Practical Design?
- Managed Lanes?
- Trail Projects?
- Pedestrian Bridges?



<b>INTRODUCTION</b>	<b>SIGNALIZATION</b>
Introduction	Signalization Guidelines
Disclaimer	21. Signalization Analysis
Project Information	22. Signalization Plans
Summary	<b>LIGHTING</b>
<b>PROJECT GENERAL TASKS</b>	Lighting Guidelines
3. Project Common and Project General Tasks	23. Lighting Analysis
<b>ROADWAY ANALYSIS</b>	24. Lighting Plans
Roadway Guidelines	<b>LANDSCAPE ARCHITECTURE</b>
4. Roadway Analysis	Landscape Guidelines
5. Roadway Plans	25. Landscape Architecture Analysis
<b>DRAINAGE ANALYSIS</b>	26. Landscape Architecture Plans
6. Drainage Analysis	<b>SURVEY</b>
<b>UTILITIES</b>	Survey Guidelines
Utilities Guidelines	27. Survey
7. Utilities	<b>PHOTOGRAMMETRY</b>
<b>ENVIRONMENTAL PERMITS</b>	Photogrammetry Guidelines
Environmental Permits Guidelines	28. Photogrammetry
8. Environmental Permits, Compliance and Clearances	<b>MAPPING</b>
<b>STRUCTURES</b>	29. Mapping
Structures Guidelines	<b>GEOTECHNICAL</b>
9. Summary and Miscellaneous Tasks & Drawings	Geotechnical Guidelines
10. Bridge Development Report	30. Geotechnical
11. Temporary Bridge	<b>ARCHITECTURE</b>
12. Short Span Concrete Bridge	Architecture Guidelines
13. Medium Span Concrete Bridge	31. Architecture Development
14. Structural Steel Bridge	<b>NOISE BARRIERS</b>
15. Segmental Concrete Bridge	32. Noise Barriers Impact Design Assessment in the Design Phase
16. Movable Span	<b>INTELLIGENT TRANSPORTATION SYSTEMS (ITS)</b>
17. Retaining Walls	ITS Guidelines
18. Miscellaneous	33. ITS Analysis
<b>SIGNING &amp; PAVEMENT MARKINGS</b>	34. ITS Plans
Signing & Pavement Markings Guidelines	
19. Signing & Pavement Markings Analysis	
20. Signing & Pavement Markings Plans	

## Different Out-of-the-Box Cases

- Case 1 – Everything Fits in Existing Scope & Staff Hour Documents
- Case 2 – Most Items Fit in Existing Scope & Staff Hour Documents
  - One or two specific items “fit” into existing task or activity with comments to explain
- Case 3 – Standard Scope Does Not Apply



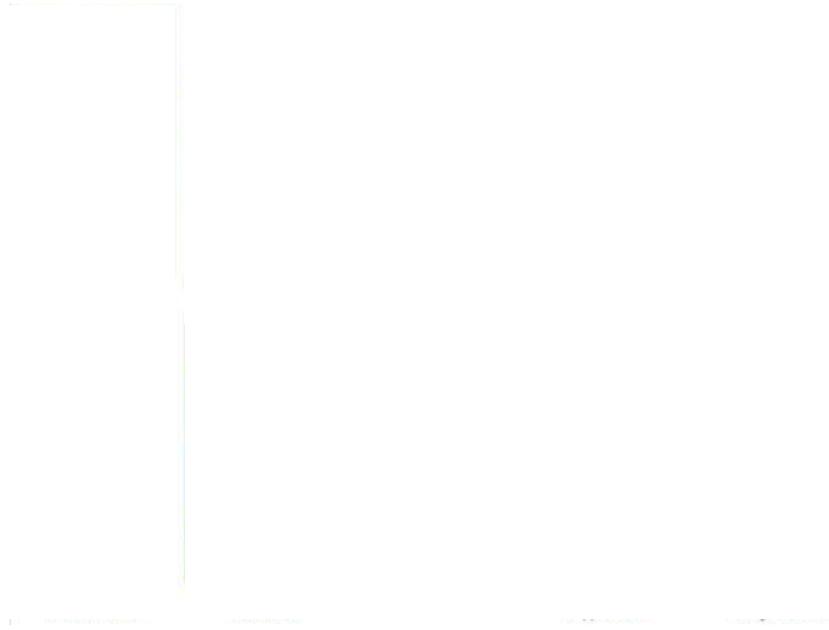
# Scoping Outside the Box



## Communication

- Talk to Others with Similar Projects
- Clear Understanding of Scope and Deliverables
- Clear Expectations
- Be Proactive (Don't Assume)
- Share your Out-of-the-Box experiences
  - They could end up in the Box some day





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## Project Scope of Services

All changes to the Standard Scope shall be shown as to alert the user that the scope requirements have changed from the standard.

- All additions shall be shown in ***Bold Italic text*** to alert the user that the scope requirements have changed from the standard.
- All sections that are **not applicable** to the project shall be indicated with "***N/A***" shown next to the section heading.



# Project Scope of Services

## “Other” Activities

- Activities 4, 6, 8, 19, 21, 23, 25, 30, 32 & 33
- Not a “catch-all”
- Must identify specific activities not covered elsewhere in that Section
- Corresponding description in “Comments” column in Staff Hour Forms to justify hours



## SHE Forms



So, what happens when you're outside this range??

- Document it in the COMMENTS Column!



# Negotiate Staff Hours

- Follow FDOT Negotiations Handbook (Mutual Gains)
- FDOT and Consultant sign-off on staff hour sheets and staff hour distribution for each discipline
- Update staff hour comments, the more detail the better



## Summary

- The Box Defined
  - What's Inside the Box
  - What's Outside the Box
  - Different Out-of-the-Box Cases
- 
- What out-of-the-Box experiences would you like to Share?



# Questions...

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