



AUTOMATED FEE PROPOSAL (AFP) USER'S GUIDE



Procurement Office
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Section 1 – Introduction

About the Guide

This document is intended as reference guide for the Automated Fee Proposal (AFP). The layout of the guide addresses each sheet within the AFP separately and attempts to show the shortcuts, as well as common errors.

Each sheet is addressed in its own chapter. The detail within each chapter addresses specific areas of input. A sample proposal is included to provide additional guidance.

AFP Overview

The AFP was designed to accomplish four goals:

- To standardize the proposal process statewide.
- Streamline the cost proposal process while also reducing calculation errors.
- Allows for offline proposal preparation.
- Provides a method for uploading the fee proposal data from the AFP into CITS.

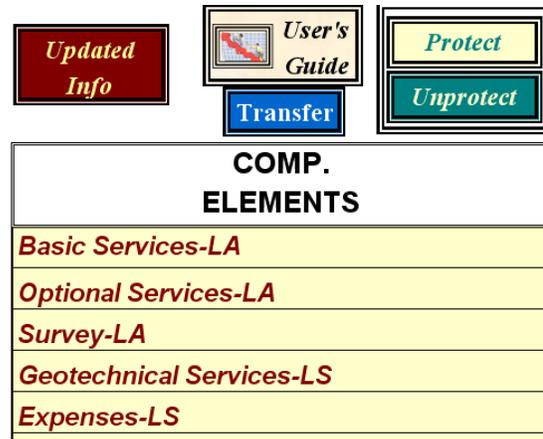
Things to keep in mind when maneuvering through the AFP are:

- This file has been protected, rendering anything other than format adjustment difficult. However, since the file protection function can be disabled, we ask that you **do not attempt to delete or add columns or rows**. This can result in an error in the transferring of information.
- The yellow background requires the input of new information.
- Blue backgrounds contain pull down menus with pre-populated information
- White backgrounds contain formulas and should not be altered. The latest AFP comes to you as a protected file. However, if you are using earlier versions of “Excel” the macros may not run in a totally protected environment. The “Element” sheet has a “Protect/Unprotect” button. If AFP gives you a “Runtime Error”, you will need to click the “Unprotect” button to proceed. However be aware that you are in an unprotected environment and have the ability damage your spreadsheet.
- When you are finished with your initial input into a specific sheet, **click on the “Updated Info” button**. This will take you to the next sheet needing input. If no information is required, **click on the “Updated Info” button** until you get to a sheet that requires data.

Section 2 – Compensation Element

What is a Compensation Element?

A Compensation Element or “Comp Element”, is a descriptive title you arbitrarily assign to a grouping of costs in the AFP. This enables you to differentiate costs by method of payment (Lump Sum or Limiting Amount) and/or type of costs (basic, optional, geotech). Remember you only have to type this information once. From that point forward a drop down menu will be populated with the information you have provided. Below is a sample of the type of information provided in the “Elements” sheet. Your project, depending on its complexity, may require far more or far less Compensation Elements.



A typical Compensation Element would be identified as basic or optional services with a method of payment “LS” or “LA”. The “LS” means the Compensation Element is being paid as a lump sum and “LA” means it’s being paid as a limiting amount (Cost Reimbursable).

Information & Requirements

The following is a list of requirements when using compensation elements:

- There must be at least one compensation element.
- The prime consultant’s main compensation element must be entered first in the “Elements” sheet.
- If the prime is using multiple compensation elements, the “Summary” sheet will separate the prime’s cost by compensation elements. Some costs will be displayed under the “Subconsultant” section of the “Summary” sheet.

In addition to the “Updated Info” button you have four other buttons. The first button is titled “User’s Guide”. This provides you with a link to the latest user’s guide on the internet.

The next set of buttons are labeled “Protect” and “Unprotect”. The latest version of Excel (Office XP) allows the spreadsheet to be fully protected and perform all necessary functions, which earlier versions did not. If you are running an earlier version of Excel, you may not be able to use the protection feature. By simply pressing the “Unprotect” button, the spreadsheet will revert to its earlier format and allow you to function as usual. However, be aware that the cells will no longer be protected and additional care must be taken when entering data.

The transfer button allows you to transfer the data from an existing AFP into a new AFP. By following the instructions below you can take the data from an AFP which may be outdated or that you feel may be corrupt, into a new AFP. It is recommended that you do this just before you send it to the district. This button will predominantly be used by Department staff. You must "Unprotect" Worksheet to use this button.

Instructions for "Transfer" Button

- 1 .) Open the latest version of the AFP and save it with the file name "AFP(Transfer)"
- 2 .) Next open the file with the data you wish to transfer and save it as "AFP(District)"
- 3 .) At this point you should have 2 files open "AFP(Transfer)" and "AFP(District)". Go to the "AFP(Transfer)" file and on the "Elements" page you will notice a blue button titled "Transfer". Press and wait till the hour glass disappears and you are on the "Summary" page of the "AFP(Transfer)" file. Once this has occurred the process is complete.
- 4 .) Verify that the totals on the two "Summary" pages are the same.
- 5 .) When you have verified that the information is correct save the "AFP(Transfer)" file under its new file name.
- 6 .) Repeat these actions for each file.

*Please note that the transfer button does not yet transfer the information that is located on the DBE Information and Subconsultant Sheets. The information on the DBE Information and Subconsultant Sheets must be manually transferred. This capability will be available once the older version of the AFP is obsolete.

If your AFP is a previous version than the current version listed on Procurement website, it is recommended that you do not utilize the Transfer Button. Instead, you should transfer your information into a new AFP manually by copying and pasting (special text or value) all yellow and blue fields.

Section 3 – “Consultant” Sheet

Project Information

The project information is located at the top of the “Consultant” Sheet and is shown in the example below. The initial upload must have the Ad Number populated in both the AD NUMBER and CONTRACT NUMBER field. Even if the contract number is available, enter only the Ad number on the initial upload or the upload of the contract into CITS will be rejected. After uploading your initial AFP into CITS, you must verify the upload was successful the very next morning and change the AD NUMBER to the CONTRACT NUMBER in CITS. Once the AD NUMBER has been changes to the CONTRACT NUMBER in CITS, you must save! If not, your contract will be archived in CITS causing a database change request to occur. To make a database change request, please contact CITS Coordinator, Brandon Spencer. Some of the contract information may not be available at the time of the proposal. Please enter as much information into the AFP as possible. The sheet requires an estimated project start and end date. However, CITS will require that the following fields be populated for a successful upload:

1. Ad Number
2. FM Number
3. Planned Start and End Dates
4. District #

PROJECT NAME :	Interstate 10 from NW 319 to SW SR90	
CONTRACT NUMBER :	C9999	Upload
AD NUMBER:	12345	Dist # <input type="text" value="0"/> Seq # <input type="text" value="1"/>
FM NUMBER:	19006313101	
AMENDMENT #:		Last
PLANNED START DATE :	1/1/06	Update: <input type="text" value="3/11/05"/>
PLANNED END DATE :	1/1/09	
PROJECT LENGTH :	36	Mths
Rates/Actuals	<input type="text" value="RTE"/>	AFP
		Version: <input type="text" value="3.28"/>

The area titled “Upload Seq #” is used when uploading multiple AFPs for the same project. Before uploading the district will simply verify that each AFP file has a different sequence number and load both AFP’s without overriding either one of them. (This field will be mainly used by the FDOT district staff.)

Consultant Information

The consultant information is beneath the project information. Below is an illustration of the “Consultant Information” section. The input fields are defined on the next page.

CONSULTANT INFORMATION

CONSULTANT	FEID	TYPE	OH	FCCM	OMDS	EXP	Multiplier	COMMENTS
Johnston Engineers, Inc.	F111111111	P	156.31%		12.00%	22.16%	2.90470	
Comprehensive Eng. Services, Inc.	F222222222	S	125.48%	0.873%	10.00%	16.75%	2.53103	
S&E Survey Service, Inc.	F333333333	S	114.16%		10.00%	9.20%	2.33360	
Geotechnical Services, Inc.	F444444444	S	139.28%	1.267%	10.00%		2.50547	
Elkwater Planners, Inc.	F555555555	S	109.18%		10.00%	3.14%	2.22320	

If you wish to propose the same consultant with two different overhead rates (home and field) on the same contract, Please call the District regarding what to enter in the “FEID” column for the field office.

CONSULTANT INFORMATION

CONSULTANT	FEID	TYPE	OH	FCCM	OMDS	EXP	Multiplier	COMMENTS
Johnston Engineers, Inc.	F111111111	P	156.31%		12.00%	22.16%	2.90470	
Johnston Engineers, Inc. (Field)	F122222222	S	116.53%		12.00%	26.53%	2.55060	
Comprehensive Eng. Services, Inc.	F222222222	S	125.48%	0.873%	10.00%	16.75%	2.53103	
S&E Survey Service, Inc.	F333333333	S	114.16%		10.00%	9.20%	2.33360	
Geotechnical Services, Inc.	F444444444	S	139.28%	1.267%	10.00%		2.50547	
Elkwater Planners, Inc.	F555555555	S	109.18%		10.00%	3.14%	2.22320	

Terms

CONSULTANT – This is where you list the prime consultant and all sub consultants eligible to work on the project.

FEID – This is where you list the FEID (Federal Employer Identification) numbers of all the companies performing work on the project. The number must be registered in MyFlorida Marketplace:

http://www.dms.myflorida.com/business_operations/state_purchasing/myfloridamarketplace

(Acceptable Format: **F111111111**)

TYPE – Differentiate between the prime and the subs with a P or S. There *must* only be one prime listed!

OH – Company overhead rates.

(Acceptable Format: **168.00**)

FCCM – Audited Facilities Capital Cost of Money rate.

(Acceptable Format: **1.500**)

OM – Negotiated operating margin percentage.

(Acceptable Format: **12.00**)

EXP – This area is for a company's direct expense rate. Starting October 1, 2003 direct expenses will be calculated using the audited direct expense rate. This rate will be applied to direct labor cost.

(Acceptable Format: **12.00**)

MULTIPLIER – This number is the composite of the Overhead, Operating margin, Direct Expense and FCCM rates. It is used to convert an unloaded rate to a loaded rate.

COMMENTS – This area is provided for memos or notes. Nothing in this column will impact calculations or be entered into CITS.

PRO. SALARY – This area is where you enter the proposed salary. The proposed salary is the consultant’s actual wage rate.

*(Acceptable Format: **31.25**)*

NEGO. SALARY – This area is where you enter the negotiated unloaded wage rate. The negotiated salary is the contract rate. The contract rate should be entered only if it is different than that amount which appears under the “CLASS AVG.” column.

*(Acceptable Format: **31.25**)*

AD NUMBER – This number is displayed as the “Contract #” in the advertisement. The initial upload will require the Ad Number to be populated in the AD NUMBER Field and the CONTRACT NUMBER Field.

*(Acceptable Format: **15911**)*

CONTRACT NUMBER – *(Acceptable Format: **C9999**)*

DATE FIELDS – *(Acceptable Format: **3/1/04**)*

After all information has been entered, simply click on the “Updated Info” button and proceed to the next sheet.

Section 4 – “Employee” Sheet

Drop down menus (Blue Area)

One thing that you should notice about this sheet is that all of the information entered in the two prior sheets has been used to populate drop down menus located in the blue areas. Please do not type in the blue areas. The calculations through this spreadsheet require that names be spelled consistently. If you are going to populate sequential or adjacent cells with like information, you may drag or copy the information in the first cell to all applicable cells, but to ensure consistency **use the drop down menu for your initial selection**. (The autofill or drag function requires the spreadsheet to be in “unprotect” mode.)

In the illustration below, you see that “Johnston Engineers, Inc.” was chosen from the drop down menu. You could go to each cell and choose “Johnston Engineers, Inc.” individually or you could copy “Johnston Engineers, Inc.” to all subsequent cells. The same is true for all areas *except* those populated with formulas (cells with white background).

		POS	
CONSULTANT	EMPLOYEE NAME	NAME	#
Johnston Engineers, Inc.	Johnston, Edward	Project Engineer	
Johnston Engineers, Inc.	Smith, Lonnie	Engineer	
Johnston Engineers, Inc.	Davis, John	Engineer	

New Information (Yellow Area)

After choosing from the drop down menus, you may need to populate the yellow areas with requested information. The only required information is located under the header titled “PRO. SALARY”. The other information is not required for the calculations to function properly, but may need to be populated depending on the type of contract you have.

COMP. ELEMENT	PRO. SALARY	NEGO. SALARY	WEIGHT FACTOR	PROPOSED		NEG.
				CLASS AVG.	AVG.	SALARY
Basic Services-LA	\$ 64.23	\$ 60.00		\$ 64.23	\$ 64.23	\$ 60.00
Basic Services-LA	\$ 37.26			\$ 34.27	\$ 34.27	\$ -
Basic Services-LA	\$ 31.23			\$ -	\$ -	\$ -
Basic Services-LA	\$ 34.33			\$ -	\$ -	\$ -

Calculations (White Area)

Once all of the necessary blue and yellow areas are populated, the spreadsheet will calculate the class average.

If the consultant negotiates a salary different from what was originally proposed, then the proposed salary can be overridden by entering an amount in the area titled “NEGO. SALARY” for the position being revised. In the employees tab, the negotiated salary

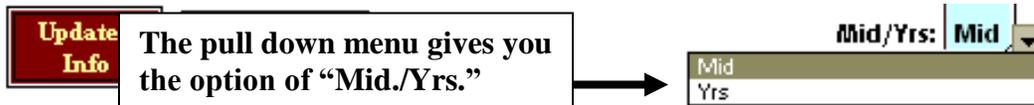
must be entered as an unloaded rate. The loaded rate for the negotiated salary can be found under the BURDENED tab.

Employee Information

Below are descriptions and requirements for the information contained in the “Employee” Sheet.

Midpoint/Years

You now must calculate your rates by using the “Mid.” methodology on the “Employee” and “Loaded” sheets. Examples 1 & 2 illustrate the difference between “Yrs./Mid.” The “Yrs.” option was used in the past when escalation was allowed. However, for the time being escalation has been prohibited on Professional Services contracts.



CONSULTANT		EMPLOYEE NAME	POS	
		NAME	#	EL
Johnston Engineers, Inc.		Johnston, Edward	Project Engineer	

If you chose “Mid” in the drop down menu, your “Employee” sheet will look like the example below:

Example 1:

PROPOSED		NEG.				
CLASS	AVG.	AVG.	SALARY			
	\$ 64.23	\$ 64.23	\$ 60.00			
	\$ 34.27	\$ 34.27				

You will note that only the first three columns in this example are populated. This is performing the same calculation as the prior version of the AFP.

If you chose “Yrs.” in the drop down menu, your “Employee” sheet will look like the example below:

Example 2:

PROPOSED		NEG.	1/1/04	6/30/04	6/30/05	6/30/06
CLASS	AVG.	AVG.	to	to	to	to
		SALARY	6/29/04	6/29/05	6/29/06	12/31/06
			\$ 60.00	\$ 60.00	\$ 60.00	\$ 60.00
			\$ 34.27	\$ 34.27	\$ 34.27	\$ 34.27

Note that the first three columns are no longer populated and the calculations are being performed to the right of those columns. You will also notice a slight difference in the appearance of the work effort sheet because of this change.

CONSULTANT – The drop down menu will provide you with options based on information provided in the “Consultant” sheet. **NEVER TYPE IN THIS AREA.** The spreadsheet requires consistency throughout the workbook. Selecting from the drop down menu ensures that the consultants’ names will be spelled consistently throughout. You may, if you wish, select the information from the drop down menu and then copy it to all necessary cells, but **always** start with a drop down menu selection as illustrated below.

Example 1:

CONSULTANT	EMPLOYEE NAME	NAME	#
Johnston Engineers, Inc.	Johnston, Edward	Project Engineer	

Once you have selected the initial input using the drop down menu.

Example 2:

CONSULTANT	EMPLOYEE NAME	NAME	#
Johnston Engineers, Inc.	Johnston, Edward	Project Engineer	
Johnston Engineers, Inc.			
Johnston Engineers, Inc.			
Johnston Engineers, Inc.			

You can copy them down or select from drop down menus.

EMPLOYEE NAME – Names of staff proposed within each position may be required by the district as part of the negotiations, but are not required for upload.

POSITION NAME – **DO NOT TYPE IN THIS AREA.** Use the drop down menu to enter data.

The list of positions, located in the drop down area, are defined in the “Negotiations Handbook”. This list was developed because of a collaborative effort between PSU, FDOT Project Management and FICE. Every effort should be made to ensure that only these job classes are used.

EMPLOYEE NAME	NAME	#	COMP. ELEMENT	CURRENT SALARY
Johnston, Edward	Project Engineer		Basic Services-LA	\$ 64.23

POSITION # – This area is to be used only when you are proposing multiple positions within a job classification but have vastly different duties and responsibilities. In this situation, you would use the “#” drop down menu to individualize the position. The spreadsheet will only average what has been grouped for each position through the “#” column.

Example 1 below is proposed as a class average. The three “Engineer” positions have a class average of \$34.27.

In example 2 the three “Engineer” positions are being proposed in groups and have varying rates for each group.

Example 1:

POSITION			PROPOSED		NEG.			
JOB CLASSIFICATION	#	COMP. ELEMENT	PRO. SALARY	NEGO. SALARY	WEIGHT FACTOR	CLASS AVG.	AVG.	SALARY
Project Engineer		Basic	\$ 64.23	\$ 60.00		\$ 64.23	\$ 64.23	\$ 60.00
Engineer		Basic	\$ 37.26			\$ 34.27	\$ 34.27	
Engineer		Basic	\$ 31.23					
Engineer		Basic	\$ 34.33					

Example 2:

POSITION			PROPOSED		NEG.			
JOB CLASSIFICATION	#	COMP. ELEMENT	PRO. SALARY	NEGO. SALARY	WEIGHT FACTOR	CLASS AVG.	AVG.	SALARY
Project Engineer		Basic	\$ 64.23	\$ 60.00		\$ 64.23	\$ 64.23	\$ 60.00
Engineer	A	Basic	\$ 37.26			\$ 34.25	\$ 34.25	
Engineer	A	Basic	\$ 31.23					
Engineer	B	Basic	\$ 34.33			\$ 34.33	\$ 34.33	

COMP. ELEMENT – This uses a drop-down menu to allow you to assign the method of compensation to a particular line item and is a required field.

PRO. SALARY – This is the certified wage rate for an individual in a proposed position.

NEGOTIATED CURRENT SALARY – For CEI Contracts and any other contract where the consultant voluntarily lowers their rates, the “NEGO. SALARY” is to be used. When the consultant and the FDOT contracting officer negotiate a salary other than what is proposed, you simply enter that amount in the “NEGO. SALARY” column. This will override the proposed salary information with the negotiated salary rate throughout the spreadsheet. The negotiated salary being entered on the Employee tab must not be a loaded rate.

EMPLOYEE	COMP.		PRO.	NEGO.
NAME	NAME	#	SALARY	SALARY
Johnston, Edward	Project Engineer		\$ 64.23	\$ 60.00
Smith, Lonnie	Engineer		\$ 37.26	

WEIGHT FACTOR – In the event that one employee will do the majority of the work, you may not wish to have a straight average of the positions proposed. As the examples shown below demonstrate, this field allows you to skew the average in a particular direction.

Example 1 (below) shows a straight average of the three “Engineer” positions. Example 2 (below) shows what would happen if the first employee’s salary accounted for 65% of the three proposed salaries. You can see that as a result of this, the “CLASS AVG.” is higher.

Example 1:

		POSITION			PROPOSED		NEG.	
NAME	#	COMP. ELEMENT	PRO. SALARY	NEGO. SALARY	WEIGHT FACTOR	CLASS AVG.	AVG.	SALARY
Project Engineer		Basic Services-LA	\$ 64.23	\$ 60.00		\$ 64.23	\$ 64.23	\$ 60.00
Engineer		Basic Services-LA	\$ 37.26			\$ 34.27	\$ 34.27	
Engineer		Basic Services-LA	\$ 31.23					
Engineer		Basic Services-LA	\$ 34.33					

Example 2:

		POSITION			PROPOSED		NEG.	
NAME	#	COMP. ELEMENT	PRO. SALARY	NEGO. SALARY	WEIGHT FACTOR	CLASS AVG.	AVG.	SALARY
Project Engineer		Basic Services-LA	\$ 64.23	\$ 60.00		\$ 64.23	\$ 64.23	\$ 60.00
Engineer		Basic Services-LA	\$ 37.26		65%	\$ 35.61	\$ 35.61	
Engineer		Basic Services-LA	\$ 31.23		20%			
Engineer		Basic Services-LA	\$ 34.33		15%			

NEGOTIATED CURRENT SALARY – For CEI Contracts and any other contract where the consultant voluntarily lowers their rates, the “NEGO. SALARY” is to be used. When the consultant and the FDOT contracting officer negotiate a salary other than what is proposed, you simply enter that amount in the “NEGO. SALARY” column. This will override the proposed salary information with the negotiated salary information throughout the spreadsheet.

		POSITION			PROPOSED		NEG.	
NAME	#	COMP. ELEMENT	PRO. SALARY	NEGO. SALARY	WEIGHT FACTOR	CLASS AVG.	AVG.	SALARY
Project Engineer		Basic Services-LA	\$ 64.23	\$ 60.00		\$ 64.23	\$ 64.23	\$ 60.00
Engineer		Basic Services-LA	\$ 37.26	\$ 32.00		\$ 34.27	\$ 34.27	\$ 32.00
Engineer		Basic Services-LA	\$ 31.23					
Engineer		Basic Services-LA	\$ 34.33					

Section 5 – “Other Direct Expenses” Sheet

This sheet is laid out similar to the “Employee” sheet. It requires much of the same information. The major differences are that this sheet requires you to identify the unit of measure and it does not require further input to calculate total costs. There should normally be no “Other Direct Expense” items. The only exceptions would be the unusual and infrequently occurring items that cost in excess of \$10,000, as determined by the OIG or Procurement Office. When such items are compensated separately from the direct expense rate, they must be excluded from the direct expense pool used to calculate the direct expense rate. Refer to your Negotiation Handbook or Overhead Audit Guidelines for further details.

CONSULTANT	ITEM	PER UNIT COST	UNIT OF MEASURE	# UNITS	COMP. ELEMENT	TOTAL
Johnston Engineers, Inc.	Barge	\$ 25,000.00	Day	7	Expenses-LS	\$ 175,000.00

CONSULTANT

Use the drop down menu to select the consultant name.

ITEM

The proposed item description is entered in this field. The item description should clearly distinguish it from the other items being proposed.

PER UNIT COST

Proposed unit cost

UNIT OF MEASURE

This refers to how the item will be billed, such as per month or per mile.

UNIT

This is the number of units being proposed for the length of the contract (when applicable).

COMP. ELEMENT – This field allows you to assign the method of compensation to a particular line item and is a required field.

TOTAL – Once all of the above information is provided, the sheet will total the cost by item. It will also calculate the total proposed by the consultant. Although this amount is not displayed, it will be carried forward to the “FEE CALC.” sheet once you click on the “Updated Info” button.

Section 6 – “Loaded” Sheet

This sheet is very similar to the “Direct Expense” sheet. It requires much of the same information, such as unit of measure and price per unit. The primary difference lies with how a loaded rate is calculated.

A loaded rate is one where all of the elements necessary for performing the proposed function are included into a single rate. The example below demonstrates a typical loaded rate. Since all members of the survey crew are necessary to perform the survey function, they are billed as a unit rather than as individual units. These rates are commonly proposed for geotechnical and environmental services.

Example 1:

LOADED THREE MAN SURVEY CREW			
Survey Crew Chief	\$	17.00	per hr.
Surveyor	\$	12.00	per hr.
Rod man	\$	8.00	per hr.
Total cost :	\$	37.00	per hr.
		8	hours per day
	\$	296.00	per day
Overhead Rate:	118.00%	\$	349.28
Operating Margin:	12.00%	\$	35.52
Loaded Day Rate:		\$	680.80

Like the “Employee” sheet, the “Loaded” rate sheet calculates information based on your choice of “Mid.” or “Yrs.” in the “Consultant” sheet.

“Mid.”

ITEM	UNIT OF MEASUR	RATES		COMP ELEMENT	WEIGHTF FACTOR	AVERAGE
		PRO.	NEGO.			
1-3 foot boring	Each	\$ 26.75		Basic Services-LA		\$ 26.75
3-6 foot boring	Each	\$ 33.14		Basic Services-LA		\$ 33.14
6+ foot boring	Each	\$ 50.00		Basic Services-LA		\$ 50.00

“Yrs.”

ITEM	UNIT OF MEASUR	RATES		COMP. ELEMENT	WEIGHTF FACTOR	AVERAGE	6/30/05	6/30/06	6/30/07
		PRO.	NEGO.				to 6/29/06	to 6/29/07	to 6/29/08
1-3 foot boring	Each	\$ 26.75		Basic Services-LA		\$ -	\$ 26.75	\$ 26.75	\$ 26.75
3-6 foot boring	Each	\$ 33.14		Basic Services-LA		\$ -	\$ 33.14	\$ 33.14	\$ 33.14
6+ foot boring	Each	\$ 50.00		Basic Services-LA		\$ -	\$ 50.00	\$ 50.00	\$ 50.00
Density Test	Each	\$ 123.46		Basic Services-LA		\$ -	\$ 123.46	\$ 123.46	\$ 123.46

CONSULTANT

Follow the instructions on pages 9 & 10 of this manual.

ITEM

The proposed item description should be picked from the drop down menu in this field. The list of items, located in the drop down menu, are defined in the “Negotiations Handbook.” This list was developed as a result of a collaborative effort between PSU, FDOT Materials and Testing Office and FICE. Every effort should be made to ensure that only these items are used. This field can also be typed in for items not appearing on the drop down menu. The item description should clearly distinguish it from the other items being proposed. Please limit your item description to under 60 characters in length.

PER UNIT COST

When the contracted cost is for an individual item such as “Day” or “Feet,” you would enter the amount to be charged for a single unit.

UNIT OF MEASURE

This refers to how the item will be billed, such as per month or per mile.

UNIT

This is the number of units being proposed for the length of the contract (when applicable).

COMP. ELEMENT – This area allows you to assign the method of compensation to a particular line item and is a required field.

TOTAL – Once all of the above information is provided, the sheet will total the cost by item. It will also calculate the total proposed by the consultant. Although this amount is not displayed, it will be carried forward to the “FEE CALC.” sheet once you click on the “Updated Info” button.

Section 7 – “DBE Information” Sheet

This sheet will be used as a means for districts to input Disadvantaged Business Enterprise, or DBE Commitment data manually into the Professional Services Information System. This sheet can be accessed in two places, the first location you will find a button for it is on the “Loaded” Sheet.

The second button is located on the “Fee Summary” Sheet.

CONSULTANT	Professional Services Work Type Performed	NAICS Code for Work Performed	Short Description of Services Performed	Award DBE Credit?	Commitment (Dollar Amount)

CONSULTANT

Use the drop down menu to select the consultant name.

PROFESSIONAL SERVICES WORK TYPE PERFORMED

Use drop down menu to select the Work Type which consultant will be performing, work types/descriptions of services are found in the F.A.C. 14-75:

<http://www.dot.state.fl.us/procurement/pdf/Rule%2014-75.pdf>

NAICS CODE FOR WORK PERFORMED

Use drop down menu to select North American Industry Classification System (NAICS) Code, which the consultant will be performing work. NAICS Codes can be found on the Equal Opportunity Office Website at

<http://www.dot.state.fl.us/equalopportunityoffice/Specialty%20Codes.pdf>. Further, a crosswalk between Professional Services Work Types and NAICS codes are found at <http://www.dot.state.fl.us/procurement/pdf/NAICS%20Crosswalk.pdf>.

SHORT DESCRIPTION OF SERVICES PERFORMED– This free form field is available for entry of a brief description of the services being provided. Further instructions regarding DBE Information sheet will be provided by the districts in the Request for Fee Proposal.

AWARD DBE CREDIT?

Use the drop down menu to select 'Yes' or 'No' depending on whether the consulting firm is a Disadvantaged Business Enterprise firm that is qualified in the selected NAICS code.

COMMITMENT (DOLLAR AMOUNT)

The expected DBE Commitment in dollars will be entered in this field.

Section 8 – “Subconsultant” Sheet

The Subconsultant Sheet is an optional sheet that may require input based on the decision of the district. All fields are identical to those found on the DBE Information sheet. This sheet can be accessed in two places, the first location you will find a button for it is on the “Loaded” Sheet.

CONSULTANT	ITEM	UNIT OF MEASURE	RATES		COMP. ELEMENT	WEIGHTE FACTOR	AVERAGE
			PRO.	NEGGO.			

The second button is located on the “Fee Summary” Sheet.

CONTRACT DETAIL	CONSULTANT TOTALS	CONTRACT TOTAL

Subconsultant Information (Optional)

CONSULTANT	Professional Services Work Type Performed	NAICS Code for Work Performed	Short Description of Services Performed	Award DBE Credit?	Commitment (Dollar Amount)

Section 9 – “WE-Unloaded & WE-Loaded” Sheets

The “WE” in “WE-Unloaded/Loaded” sheet stands for Work Effort. These sheets exist for the purpose of assigning a proposed number of hours or units to a proposed item. All of the positions and hourly rates entered in the “Employee” sheet have been brought forward to populate the “WE-Unloaded” sheet. Hourly rates should appear next to the associated consultant, position, and compensation element being proposed. Simply enter the number of hours per position being proposed and the sheet will calculate the total unloaded cost per position. The sheet will then calculate the total amount for each consultant, by compensation element. Once the “Updated Info” button is clicked, it will take this information and populate the “Fee Calc.” sheet.

You also will notice that the “WE-Unloaded” sheet contains columns populated with checkboxes entitled “O/T”. The spreadsheet will calculate straight and premium overtime as a percentage of all classifications checked. It will segregate these costs by consultant and by compensation element.

The “WE-Loaded” is similar to the “WE-Unloaded” sheet. Simply enter the required information and the sheet will calculate the total cost per item and further calculates the total amount for each consultant, by compensation element. Like the “WE-Unloaded” sheet, this information is used to populate the “Fee Calc.” sheet.

Please note that depending on whether you have proposed “Mid.” or “Yrs.” the data will be titled either “Midpoint” (Example 1), or “Year 1, Year 2, etc.” (Example 2). This indicates the method of calculation selected.

Example 1:

UNLOADED

Name of Prime Consultant : **Johnston Engineers, Inc.**

Consultant	Staff Classification	Element	OT	Rate	Midpoint		Rate	Hours	Cost
					Hours	Cost			
Johnston Engineers, Inc.	Engineer	Basic Services-LA	<input type="checkbox"/>	\$ 32.64	2000	\$ 65,280.00	\$ -		\$ -
Johnston Engineers, Inc.	Inspector	Basic Services-LA	<input type="checkbox"/>	\$ 19.93	2000	\$ 39,860.00	\$ -		\$ -
Johnston Engineers, Inc.	Office Manager	Basic Services-LA	<input type="checkbox"/>	\$ 22.10	2000	\$ 44,200.00	\$ -		\$ -
Johnston Engineers, Inc.	Project Engineer	Basic Services-LA	<input type="checkbox"/>	\$ 61.20	2000	\$ 122,400.00	\$ -		\$ -
Johnston Engineers, Inc.	Secretary/Clerical	Basic Services-LA	<input type="checkbox"/>	\$ 12.03	2000	\$ 24,060.00	\$ -		\$ -
Comprehensive Eng. Services, Inc.	Chief Engineer	Optional Services-LA	<input type="checkbox"/>	\$ 17.02	2000	\$ 34,040.00	\$ -		\$ -
Comprehensive Eng. Services, Inc.	Designer	Optional Services-LA	<input type="checkbox"/>	\$ 48.64	2000	\$ 97,280.00	\$ -		\$ -
Comprehensive Eng. Services, Inc.	Senior Specialist	Optional Services-LA	<input type="checkbox"/>	\$ 32.03	2000	\$ 64,060.00	\$ -		\$ -
Elkwater Planners, Inc.	Planner	Basic Services-LA	<input type="checkbox"/>	\$ 24.67	2000	\$ 49,340.00	\$ -		\$ -
Elkwater Planners, Inc.	Secretary/Clerical	Basic Services-LA	<input type="checkbox"/>	\$ 9.99	2000	\$ 19,980.00	\$ -		\$ -

Example 2:

UNLOADED

Name of Prime Consultant : **Johnston Engineers, Inc.**

Consultant	Staff Classification	Element	OT	Rate	Year 1		Year 2		Cost
					Hours	Cost	Rate	Hours	
Johnston Engineers, Inc.	Engineer	Basic Services-LA	<input type="checkbox"/>	\$ 32.00	1000	\$ 32,000.00	\$ 32.00	1000	\$ 32,000.00
Johnston Engineers, Inc.	Inspector	Basic Services-LA	<input type="checkbox"/>	\$ 19.34	1000	\$ 19,340.00	\$ 19.34	1000	\$ 19,340.00
Johnston Engineers, Inc.	Office Manager	Basic Services-LA	<input type="checkbox"/>	\$ 21.45	1000	\$ 21,450.00	\$ 21.45	1000	\$ 21,450.00
Johnston Engineers, Inc.	Project Engineer	Basic Services-LA	<input type="checkbox"/>	\$ 60.00	1000	\$ 60,000.00	\$ 60.00	1000	\$ 60,000.00
Johnston Engineers, Inc.	Secretary/Clerical	Basic Services-LA	<input type="checkbox"/>	\$ 11.67	1000	\$ 11,670.00	\$ 11.67	1000	\$ 11,670.00
Comprehensive Eng. Services, Inc.	Chief Engineer	Optional Services-LA	<input type="checkbox"/>	\$ 16.54	1000	\$ 16,540.00	\$ 16.54	1000	\$ 16,540.00
Comprehensive Eng. Services, Inc.	Designer	Optional Services-LA	<input type="checkbox"/>	\$ 47.28	1000	\$ 47,280.00	\$ 47.28	1000	\$ 47,280.00
Comprehensive Eng. Services, Inc.	Senior Specialist	Optional Services-LA	<input type="checkbox"/>	\$ 31.14	1000	\$ 31,140.00	\$ 31.14	1000	\$ 31,140.00
Elkwater Planners, Inc.	Planner	Basic Services-LA	<input type="checkbox"/>	\$ 24.11	1000	\$ 24,110.00	\$ 24.11	1000	\$ 24,110.00
Elkwater Planners, Inc.	Secretary/Clerical	Basic Services-LA	<input type="checkbox"/>	\$ 9.76	1000	\$ 9,760.00	\$ 9.76	1000	\$ 9,760.00

Just like the “WE-Unloaded” sheet, the WE-Loaded” sheet also differentiates between “Mid.” (Example 1) and “Yrs.” (Example 2).

Example 1:

LOADED



Name of Prime Consultant :

Johnston Engineers, Inc.

Consultant	Item	Element	Midpoint			Cost	Rate	# Units	Unit	Cost
			Rate	# Units	Unit					
S&E Survey Services, Inc.	4-Man Survey Crew	Survey-LA	\$ 540.98	12	Day	\$ 6,491.81	\$ -			\$ -
S&E Survey Services, Inc.	5-Man Survey Crew	Survey-LA	\$ 669.79	22	Day	\$ 14,735.39	\$ -			\$ -
S&E Survey Services, Inc.	Rodman	Survey-LA	\$ 97.00	14	Day	\$ 1,357.94	\$ -			\$ -
Elkwater Planners, Inc.	1-3 foot boring	Basic Services-LA	\$ 27.56	126	Each	\$ 3,473.12	\$ -			\$ -
Elkwater Planners, Inc.	3-6 foot boring	Basic Services-LA	\$ 34.15	227	Each	\$ 7,751.82	\$ -			\$ -
Elkwater Planners, Inc.	6+ foot boring	Basic Services-LA	\$ 51.52	125	Each	\$ 6,440.29	\$ -			\$ -
Elkwater Planners, Inc.	Density Test	Basic Services-LA	\$ 127.22	12	Each	\$ 1,526.63	\$ -			\$ -

Example 2:

Consultant	Item	Element	Year 1			Year 2			Cost	
			Rate	# Units	Unit	Rate	# Units	Unit		
S&E Survey Services, Inc.	4-Man Survey Crew	Survey-LA	\$ 525.00	6	Day	\$ 3,150.00	\$ 525.00	6	Day	\$ 3,150.00
S&E Survey Services, Inc.	5-Man Survey Crew	Survey-LA	\$ 650.00	11	Day	\$ 7,150.00	\$ 650.00	11	Day	\$ 7,150.00
S&E Survey Services, Inc.	Rodman	Survey-LA	\$ 94.13	7	Day	\$ 658.91	\$ 94.13	7	Day	\$ 658.91
Elkwater Planners, Inc.	1-3 foot boring	Basic Services-LA	\$ 26.75	63	Each	\$ 1,685.25	\$ 26.75	63	Each	\$ 1,685.25
Elkwater Planners, Inc.	3-6 foot boring	Basic Services-LA	\$ 33.14	113	Each	\$ 3,744.82	\$ 33.14	113	Each	\$ 3,744.82
Elkwater Planners, Inc.	6+ foot boring	Basic Services-LA	\$ 50.00	112	Each	\$ 5,600.00	\$ 50.00	112	Each	\$ 5,600.00
Elkwater Planners, Inc.	Density Test	Basic Services-LA	\$ 123.46	6	Each	\$ 740.76	\$ 123.46	6	Each	\$ 740.76

Section 10 – “Overtime” Sheet

“Overtime” Sheet

Based on revisions to our negotiation methodology your options for the recovery of premium overtime have been expanded. The prior “Negotiations Handbook” dictated that Premium Overtime was to be recovered thru your Overhead Audit. The cost could be captured either as an indirect expense, which would increase your Overhead percentage or as a direct expense which would increase your Direct Expense percentage.

You now have the option of either recovering these costs thru your Overhead Audit, as outlined above, or as a direct cost in your proposal. You may not recover the overtime cost directly on the project if it appears in your Overhead Audit.

If you recover these costs as project specific expenses, the new AFP can calculate those costs for you. Below is example of the process.

You first must identify the positions eligible for premium overtime by checking the box under the header titled “OT” next to the eligible position. Please keep in mind that this process is only for positions eligible for premium overtime. **If a position is eligible for straight overtime but not premium, the straight and overtime hours must be combined and entered in the “Hours” column.**

Once you have identified the positions eligible for premium overtime the AFP will calculate the straight and premium portions.

UNLOADED

Name of Prime Consultant : **Johnston Engineers, Inc.**

Consultant	Staff Classification	Element	OT	Rate	Midpoint		Rate	Hours	Cost
					Hours	Cost			
Johnston Engineers, Inc.	Engineer	Basic Services-LA	<input type="checkbox"/>	\$ 32.64	2000	\$			65,280.00
Johnston Engineers, Inc.	Inspector	Basic Services-LA	<input type="checkbox"/>	\$ 19.93	2000	\$			39,860.00
Johnston Engineers, Inc.	Office Manager	Basic Services-LA	<input type="checkbox"/>	\$ 22.10	2000	\$			44,200.00
Johnston Engineers, Inc.	Project Engineer	Basic Services-L	<input checked="" type="checkbox"/>	\$ 61.20	2000	\$			122,400.00
Johnston Engineers, Inc.	Secretary/Clerical	Basic Services-L	<input type="checkbox"/>	\$ 12.03	2000	\$			24,060.00
Comprehensive Eng. Services, Inc.	Chief Engineer	Optional Services-LA	<input type="checkbox"/>	\$ 17.02	2000	\$			34,040.00
Comprehensive Eng. Services, Inc.	Designer	Optional Services-LA	<input checked="" type="checkbox"/>	\$ 48.64	2000	\$			97,280.00
Comprehensive Eng. Services, Inc.	Senior Specialist	Optional Services-LA	<input type="checkbox"/>	\$ 32.03	2000	\$			64,060.00
Elkwater Planners, Inc.	Planner	Basic Services-LA	<input type="checkbox"/>	\$ 24.67	2000	\$			49,340.00
Elkwater Planners, Inc.	Secretary/Clerical	Basic Services-LA	<input type="checkbox"/>	\$ 9.99	2000	\$			19,980.00

These costs will be separated by compensation element and by consultant name. The “Overtime” sheet gives you the option of proposing overtime costs as either a fixed amount or a percentage of the labor costs. If you choose a percentage, it multiplies the percentage by the sum of the labor cost for O/T eligible positions (positions with a “Y” in the “O/T” column in the “WE-Unloaded” sheet.)

After you have entered your fixed amount or percentage, click the “Updated Info” button. The spreadsheet will then add the straight portion of the overtime costs to the direct labor proposed of that consultants total and it will place the premium overtime on a separate line. The AFP will allow you to select via drop down menu which firms are eligible for Premium Overtime.

Updated Info		<i>OVERTIME</i>					
CONSULTANT	ELEMENT	Rate	O/T%	Fixed Amount	Straight	Premium	
Johnston Engineers, Inc.	Basic Services - LA	\$ 122,400.00	15.00%		\$ 18,360.00	\$ 9,180.00	Premium O/T
S&E Survey Services, Inc.	Optional Services - LA	\$ 97,260.00		\$ 5,000.00	\$ 5,000.00	\$ 2,500.00	Premium O/T
		\$ -			\$ -	\$ -	No Premium O/T
		\$ -			\$ -	\$ -	No Premium O/T
		\$ -			\$ -	\$ -	No Premium O/T

Please note that if the fixed amount field is populated, it will override any number entered in the "O/T%" column.

Section 11 – “Burdened” Sheet

“Burdened” Sheet

This sheet is for informational purposes only. It takes the multiplier supplied on the “Consultant” sheet and applies it to the unloaded rates supplied in the “WE-Unloaded” sheet, and converts the unloaded rates to loaded rates.



BURDENED UNLOADED RATES

Consultant	Item	Element	Midpoint	Rate	Rate	Rate	Rate	Rate
			Rate					
Johnston Engineers, Inc.	Engineer	Basic Services-LA	\$ 94.81	\$ -	\$ -	\$ -	\$ -	\$ -
Johnston Engineers, Inc.	Inspector	Basic Services-LA	\$ 57.89	\$ -	\$ -	\$ -	\$ -	\$ -
Johnston Engineers, Inc.	Office Manager	Basic Services-LA	\$ 64.19	\$ -	\$ -	\$ -	\$ -	\$ -
Johnston Engineers, Inc.	Project Engineer	Basic Services-LA	\$ 177.77	\$ -	\$ -	\$ -	\$ -	\$ -
Johnston Engineers, Inc.	Secretary/Clerical	Basic Services-LA	\$ 34.94	\$ -	\$ -	\$ -	\$ -	\$ -
Comprehensive Eng. Services, Inc.	Chief Engineer	Optional Services-LA	\$ 43.08	\$ -	\$ -	\$ -	\$ -	\$ -
Comprehensive Eng. Services, Inc.	Designer	Optional Services-LA	\$ 123.11	\$ -	\$ -	\$ -	\$ -	\$ -
Comprehensive Eng. Services, Inc.	Senior Specialist	Optional Services-LA	\$ 81.07	\$ -	\$ -	\$ -	\$ -	\$ -
Elkwater Planners, Inc.	Planner	Basic Services-LA	\$ 54.85	\$ -	\$ -	\$ -	\$ -	\$ -
Elkwater Planners, Inc.	Secretary/Clerical	Basic Services-LA	\$ 22.21	\$ -	\$ -	\$ -	\$ -	\$ -
Elkwater Planners, Inc.	Senior Planner	Basic Services-LA	\$ 77.79	\$ -	\$ -	\$ -	\$ -	\$ -

Section 12 - “Partially Loaded Without Operating Margin” Sheet

Like the “Burdened” sheet, the “Partially Loaded Without Operating Margin” rate sheet shows the firm’s fully loaded rates; however, this time without the firm’s Operating Margin. The rate is loaded with the firm’s Overhead, FCCM and Direct Expense rate, which was entered on the “Consultant” tab. The intent of this information is to assist Contract Administrators in determining an appropriate Operating Margin for a firm prior to negotiations per the Negotiations Handbook. The information shown on this sheet will not upload into CITS.

PARTIALLY LOADED WITHOUT OPERATING MARGIN			
<i>*Unloaded Table 5B rates partially burdened with Overhead, Direct Expense, and FCCM. **This sheet does not upload into CITS.</i>			
Consultant	Item	Element	Partially Loaded Rates Without Operating Margin
ABC	Engineer	Basic	\$ 68.75
ABC	Engineering Technician	Basic	\$ 27.50
TEST	Architect	Basic	\$ 46.20
TEST	ArchitectB	Basic	\$ 88.00
TEST	Associate Appraiser	Basic	\$ 75.90
TEST	Associate AppraiserB	Basic	\$ 24.20
XYZ	Secretary/Clerical	Basic	\$ 33.00
XYZ	Senior Designer	Basic	\$ 110.00
			\$ -



The Updated Info button must be selected on every sheet until reaching the “Summary” sheet in order for rates to appear in the “Partially Loaded without Operating Margin” sheet. Once the “Summary” sheet is reached, click on the “Partially Loaded Without Operating Margin” sheet at the bottom of the workbook to view partially loaded rates without Operating Margin. Then, pull the Statewide Averages Report found on the Procurement Website to compare the “Partially Loaded Without Operating Margin” rates to the Proposed Partially Loaded Rates columns (either Home or Field depending on what you selected from the initial search screen).



Consultant Wage Rate Averages Report by Job Classification for Job Class Wage Rates Updated from Automated Fee Proposal(AFP) Spreadsheets

Statewide ▲

- 1 - Bartow
- 2 - Lake City
- 3 - Chipley
- 4 - Ft. Lauderdale
- 5 - DeLand
- 6 - Miami
- 7 - Tampa
- 8 - Turnpike
- 9 - Central Office ▼

DOT District

6 Months ▲

12 Months ▲

2 Years ▼

3 Years ▼

Reporting Period:(Past number of years for reporting wage rates, default is 1 year.)

Use Home Rates for Burdened

Use Field Rates for Burdened

Display Report on Web Page

Output Report to Excel Spreadsheet

Run Report

Reset

Reports Menu

On the AFP Jobclass Wage Rate Averages Report, the Proposed Partially Loaded Rates begin at the 4th column after the Jobclass column. Notice there are three columns for the Proposed Partially Loaded Rates on the report; the 25% Quartile average, Mean/Avg. and the 75% Quartile average.

**Florida Department of Transportation
Professional Services Information System
Consultant Wage Averages Report
by Job Classification
for Job Class Wage Rates Uploaded from
Automated Fee Proposal(AFP) Spreadsheets
Statewide
For the Period 10FEB2014 Through 09FEB2015**

Jobclass	Jobclass Wage Rate Statistics						Negotiated Unloaded Rates			Unit
	Proposed Unloaded Rates			** Proposed Partially Loaded Rates (Home)			25% Quartile	Mean/Avg.	75% Quartile	
	25%Quartile	Mean/Avg.	75% Quartile	25%Quartile	Mean/Avg.	75% Quartile				
Acquisition Agent	\$35.02	\$37.19	\$42.07	\$96.53	\$104.64	\$118.37	\$35.02	\$37.19	\$42.07	Hr.
Appraisal Research Assistant	\$23.97	\$34.40	\$44.84	\$67.44	\$96.79	\$126.15	\$23.82	\$32.26	\$40.70	Hr.
Appraiser	\$40.00	\$43.77	\$46.38	\$112.54	\$123.15	\$130.49	\$40.00	\$43.77	\$46.38	Hr.
Archaeologist	\$19.58	\$19.13	\$20.12	\$55.09	\$53.81	\$56.61	\$19.58	\$19.13	\$20.12	Hr.
Architect	\$20.53	\$30.63	\$37.83	\$57.76	\$86.18	\$106.44	\$20.53	\$30.35	\$36.64	Hr.
Architect Intern	\$21.64	\$22.34	\$22.60	\$60.89	\$62.85	\$63.59	\$21.64	\$22.34	\$22.60	Hr.
Associate Appraiser	\$21.64	\$21.64	\$21.64	\$60.89	\$60.89	\$60.89	\$21.64	\$21.64	\$21.64	Hr.
Certified Bridge Inspector	\$30.00	\$33.17	\$35.78	\$84.41	\$93.32	\$100.67	\$30.00	\$33.07	\$35.78	Hr.

Proposed Partially Loaded Rates are wage rate averages for each job classification and loaded with the Statewide Average Multiplier (Overhead, FCCM and Direct Expense) for Home or Field (depending on what you selected).

Section 13 – “Fee Calculation” & “Fee Summary” Sheets

“Fee Calc.” Sheet

The “Fee Calc.” Sheet gives a detailed summary of all costs proposed. The costs are listed by compensation element and by consultant. The only input required on this page is the selection of a method of payment (LA01-Est., LS03-Lmt., etc...). This is done by using the drop down menu located next to each consultant’s name, under the individual compensation element. Please refer to your district contract person for the appropriate method of payment to use (LA01, LS06, etc.). The “Est.” and “Lmt.” at the end of the selection are abbreviations for “Estimate” and “Limit,” respectively. Estimates can be exceeded, limits cannot. You will notice that in the example below you now have a cost element titled “Premium O/T”. This is where the costs shown in the “Overtime” sheet are displayed. The straight time portion of these costs have been added to the direct labor cost and the sum of these costs are incorporated in the “Labor (Unloaded)” cost element.

Basic Services-LA

CONSULTANT		TOTALS
Johnston Engineers, Inc.	LA01	
Labor(Unloaded)		\$ 26,270.05
Overhead %	156.31%	\$ 41,062.72
Operating Margin %	12.00%	\$ 3,152.41
FCCM %	0.00%	
Expense %	22.16%	\$ 5,821.44
Loaded		
Premium O/T		\$ 158.03
Other Expense		
TOTAL:		\$ 76,464.64
Comprehensive Eng. Services, Inc.	LA03	
Labor(Unloaded)		\$ 14,300.00
Overhead %	125.48%	\$ 17,943.64
Operating Margin %	10.00%	\$ 1,430.00
FCCM %	0.87%	\$ 124.84
Expense %	16.75%	\$ 2,395.25
Loaded		
Premium O/T		\$ 2,500.00
Other Expense		
TOTAL:		\$ 38,693.73

NOTE: The contract and/or Task Work order total amount may not be exceeded.

Once this has been done, simply click the “Updated Info” button and proceed to the summary sheet.

“Summary” Sheet

The “Summary” Sheet gives you a summary of the proposal. It itemizes the prime consultant’s costs and lists all of the subconsultants and the sum of their costs by compensation elements. If the prime is using different compensation elements, the summary sheet breaks out the prime’s costs. It shows their primary costs in the itemized top section and lists cost proposed with different compensation elements below.

CONTRACT DETAIL		CONSULTANT TOTALS	CONTRACT TOTAL
Johnston Engineers, Inc.			
Labor(Unloaded)		\$	150,747
Overhead %	150.00%		235,632
Operating Margin %	20.00%		43,717
FCCM %	0.00%		
Loaded			
Expense %	10.00%		33,405
Other Expense			
CONSULTANT COST:			463,501
<u>SUBCONSULTANTS</u>			
Basic Services-LA : Elkwater Planners, Inc.			191,406
Optional Services-LA : Comprehensive Eng. Services, Inc.			262,333
Survey-LA : S&E Survey Services, Inc.			22,585

You will notice two large buttons at the extreme right and left of the “Summary” sheet. They are for uploading data into the CITS system. The button on the left is for loading the data into the CITS production environment. The button on the right is for loading the data into a CITS test environment.

Only selected district personnel have the authorization to upload data into CITS. If you click these buttons and are not authorized to upload into CITS, you will receive an error message. Should you accidentally click on the button and receive an error message, it will not effect any information or calculations within the spreadsheet.

After reviewing the proposal for errors, you should “Zip” the file and then send it to the appropriate district professional services contact person. Once it has been reviewed by the district and finalized, the district will upload the spreadsheet into CITS. It is the District Professional Services Unit’s responsibility to ensure a proper payment method is used and that the AFP sheet is “Uploaded” properly.

You should be able to see the information in CITS within 24 hours after upload into CITS production.

If there are questions regarding specific spreadsheet requirements for your project, please contact your District Project Manager.

Section 14 – Companion File for the AFP

“Rate Information Transfer” File

This file was originally created to minimize redundant input of data into the AFP. By entering all of the company’s billable employees and billable loaded rates into this spreadsheet, you were able to then simply indicate the persons or items proposed on each specific contract and the spreadsheet created an “Employee” and “Loaded” tab that could easily be copied into the AFP.

The purpose of the new “Rate Info Transfer” file has been expanded. It is now intended to be used as the primary method by which subconsultants send their project specific information to the prime, bypassing the AFP altogether.

The “Rate Info Transfer” file has several new tabs to accommodate its new and expanded role. The first new tab you will notice is the “Consult Info” sheet shown below:

Updated Info		CONSULTANT INFORMATION						
CONSULTANT	FEID	TYPE	OH	FCCM	OM	EXP	Multiplier	CC
XXX, Inc.	F590000000	P	150.00%	1.500%	13.00%	20.00%	284.50%	

This tab is very similar to the “Consultants” tab. The primary difference is that it does not have a place for general project info such as project dates and numbers. The sub would enter their personal info and select. Once this is done the consultant would press the “Updated Info” button which will move you to the next tab.

The next tab is the “Employee” tab. In this area you would enter all employees that might be billed as direct labor on this project. Later in this section we will show you why you may wish to enter all of your billable employee information at one time. You would then identify the employee being proposed on the pending proposal by either entering a “Y” or using the drop down menu and selecting the “Y”. Once this is done, you press the “Updated Info” button. This will take you to the next sheet titled “Loaded”.

Updated Info		POSITIONS		
	EMPLOYEE NAME	POSITION	SALARY	
Y	Atkins, Joshua	Inspector	\$ 64.23	
Y	Beavis, Terry	Inspector	\$ 59.26	
Y	Conner, Sean	Inspector	\$ 26.15	
Y	Davis, John	Engineer	\$ 22.18	
Y	Stewart, Larry	Office Manager	\$ 27.25	
Y	Steinbock, James	Secretary/ Clerical	\$ 37.26	
	Broussard, David	Archaeologist	\$ 31.23	
Y	Enoch, Patrice	Engineer	\$ 34.33	
Y	Lilly, John	Appraiser	\$ 55.48	
	Mosely, Alex	Engineer	\$ 62.18	
Y	Crowson, Robert	Engineer	\$ 48.44	

Like the “Employee” sheet, you would prepopulate this sheet with all billable loaded rate information. You would again identify the items being proposed on the pending contract with a “Y” and press “Updated Info” (see the following example).

Updated Info

LOADED RATES

	ITEM	MEASURE	PROPOSED
	3-Man Survey Crew	Day	\$ 417.22
Y	4-Man Survey Crew	Day	\$ 548.23
	5-Man Survey Crew	Day	\$ 674.14
Y	Engineer	Hour	\$ 103.46
	Senior Engineer	Hour	\$ 121.18
Y	Inspector	Hour	\$ 61.58
	Rodman	Hour	\$ 45.26
Y	1-3 foot Boring	Each	\$ 26.75
	3-6 foot Boring	Each	\$ 33.14
	Over 6 foot Boring	Each	\$ 50.43
Y	Electric Manipulator	Each	\$ 64.00

The “Materials” tab works in a similar manner as the “Employee” and “Loaded” tabs. You will need to select “Y” to add the rate, enter the proposed amount then select from the drop down menu for the column, “Labor Included?” In the next column, you will select whether you own or rent the equipment from the drop down menu. The Long Description is there to help you in defining the “Item.” When you finished entering information in this tab, press the “Updated Info” to go to the next tab.

Updated Info

MATERIAL RATES

	ITEM	ITEM#	UNIT OF MEASURE	PROPOSED RATES	LABOR INCLUDED?	RENT OR OWN EQUIPMENT?	LONG DESCRIPTION	COMMENTS
Y	Aggregate Acid Insol Retained 200 Sieve FM 5-510	100	Test	\$10.00			Includes all labor, equipment and materials to perform test.	
Y	Aggregate Carbonates & Organic Matter FM 5-514	101	Test	\$15.00			Includes all labor, equipment and materials to perform test.	
Y	Aggregate Org. Impurities S& for Concrete AASHTO T21	102	Test	\$20.00			Includes all labor, equipment and materials to perform test.	
Y	Aggregate Shell Content of Coarse Aggregate FM 5-555	103	Test	\$25.00			Includes all labor, equipment and materials to perform test.	
Y	Aggregate Sieve Anlys of Fine & Coarse AASHTO T27	104	Test	\$30.00			Includes all labor, equipment and materials to perform test.	
Y	Aggregate Soundness AASHTO T104	105	Test	\$35.00			Includes all labor, equipment and materials to perform test.	
Y	Aggregate Specific Gravity/Absorption Coarse AASHTO T85	106	Test	\$40.00			Includes all labor, equipment and materials to perform test.	
Y	Aggregate Total Moisture Content by Drying AASHTO T255	107	Test	\$45.00			Includes all labor, equipment and materials to perform test.	
Y	Aggregate Unit Mass & Voids AASHTO T19	108	Test	\$50.00			Includes all labor, equipment and materials to perform test.	
Y	Asphalt Bulk Specific Gravity FM 1-1166	200	Test	\$55.00			Includes all labor, equipment and materials to perform test.	
Y	Asphalt Content FM 5-563	201	Test	\$60.00			Includes all labor, equipment and materials to perform test. Includes tests FM 5-563 (Asphalt Content) and FM 1-1030 (Gradation). Sampling & delivery are not included.	
Y	Asphalt Friction Panel	202	Test	\$65.00				

Once you press “Updated Info” on the “Materials” sheet, you will be taken to the “Transfer” sheet. The example below shows what the “Transfer” sheet looks like. It should be a summary of the people and items selected, sorted by “Position” or “Item.” “Employee Name” further sorts the Positions table. If the information looks correct, press the “Updated Info” and this will take you to the “Work Effort” tab.

Updated Info

POSITIONS

LOADED RATES

EMPLOYEE NAME	POSITION	#	SALARY	Weight (%)	ITEM	MEASURE	COST	COMMENTS
Worker A	Project Manager		\$ 50.00		Survey Crew	Day	\$ 300.00	
					100-Aggregate Acid Insol Retained 200 Sieve FM 5-510	Test	\$ 10.00	
					101-Aggregate Carbonates & Organic Matter FM 5-514	Test	\$ 15.00	
					102-Aggregate Org. Impurities S& for Concrete AASHTO T21	Test	\$ 20.00	
					103-Aggregate Shell Content of Coarse Aggregate FM 5-555	Test	\$ 25.00	
					104-Aggregate Sieve Anlys of Fine & Coarse AASHTO T27	Test	\$ 30.00	
					105-Aggregate Soundness: AASHTO T104	Test	\$ 35.00	
					106-Aggregate Specific Gravity/Absorption Coarse AASHTO T85	Test	\$ 40.00	
					107-Aggregate Total Moisture Content by Drying AASHTO T255	Test	\$ 45.00	
					108-Aggregate Unit Mass & Voids AASHTO T19	Test	\$ 50.00	
					200-Asphalt Bulk Specific Gravity FM 1-1166	Test	\$ 55.00	
					201-Asphalt Content FM 5-563	Test	\$ 60.00	
					202-Asphalt Friction Panel	Test	\$ 65.00	

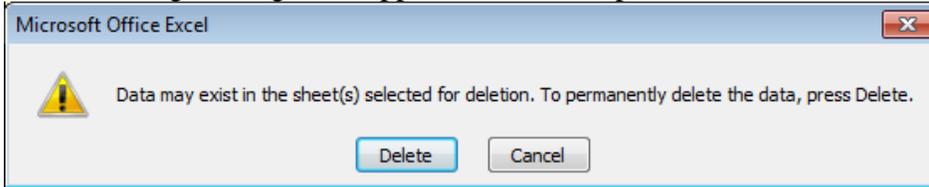
After you have completed the DBE Information Sheet and Subconsultant Sheet (both are optional), you can select the “Go Back to Work Effort” button which takes you back to the previous sheet.



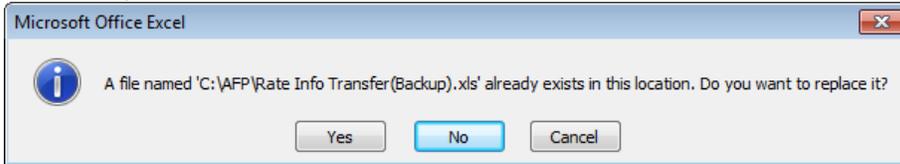
Before you use the “*Create Transfer File*” button, you must first create a folder in your C Drive named AFP (C:\AFP). Otherwise, you will receive an error when trying to use the Create Transfer File.

Once you have created your folder, you will press the “*Create Transfer File*” button.

The following message will appear three times, press delete each time:



Then you will receive the following message (not on your initial save, but every save thereafter):



Select Yes.

This will do two things. First, it will save the file with its current name and under its current directory. Secondly, it will create the actual file you will send to the prime. The file you will send to the prime will only contain five tabs, the “Consult Info” tab, the “Expenses” tab, the “Transfer” tab, the “Work Effort” tab, and the “DBE” tab. It will delete the “Employee”, “Loaded” and “Materials” tabs. It will then save the revised file as follows **C:\AFP\Rate Info Transfer(Backup).xls**. This file will be transferred to the prime.

Once the prime receives it, they will simply highlight the cell directly under the “Employee Name” in the “Position” section down to the last populated cell in the “Salary” column. Select the copy function in “Excel”, and using the paste special/value function, paste it into the “Employee” sheet of the AFP.

You repeat this action in the “Loaded Rates” section copying and pasting it into the “Loaded” sheet in the AFP.

Once the prime has entered all of their information and has transferred all of the subconsultant information, they will press all of the “Updated Info” buttons.

After they have reviewed the AFP and is confident it’s correct, they can then zip the file and send it to the district for their review.