



Florida Department of Transportation

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ESTIMATES BULLETIN 14-04

DATE: May 31, 2014

TO: District Estimates Coordinators

FROM: Phillip Greg Davis, State Estimates Engineer

COPIES TO: Trey Tillander, Ken Richardson, Cheri Sylvester, and Christine Shafik

SUBJECT: Automated Contract Bid Review Process

BACKGROUND: A proposal was made by the District 2 Estimates Office personnel for automation of bid review documents and utilization of email communication with the contractor in order to promote efficiencies in the contract bid review process. The proposal includes generating applicable bid review documents and automatically sending these documents to the appropriate District Estimates for use in emailing to the contractor for responding. This process eliminates the need to contact the contractor via phone and provides flexibility to the contractor in responding to the documents. In the past, numerous hours have been lost in trying to contact the appropriate person with the contractor for response to bid review inquiries. This proposal has been vetted with the other Districts and Turnpike Enterprise and the following process developed as shown in the requirements below.

PROCESS/REQUIREMENTS:

Following the letting, the applicable bid review documents, in accordance with procedures, will be emailed to the respective District Estimates Office. District Estimates Office personnel will review/revise documents as necessary and email to the appropriate contractor (or project manager for unbalanced bid review) for responding and signing. Once these documents are returned to the District Estimates Office, they will be posted on the District's SharePoint site for retrieval by Central Office Estimates personnel responsible for compiling and reviewing bid review documents. The following documents will be included in the automation:

- Notice to Contractor (detail pay item contracts)
- Notice to Contractor Lump Sum (lump sum contracts)
- Unbalanced Bid Review (by Project Manager)
- Desk Review Pay Item Selection Report (new)

The new desk review pay item selection report will determine the minimum pay items requiring a response from the contractor on bids out-of-tolerance with the official estimate.

The documents listed above will be transmitted to the District Estimates Offices in excel format for adding additional pay items if necessary. Documents shall be converted to pdf format before emailing to the contractor or Project Manager.

Below is the revised contract bid review schedule including process automations:

Contract Bid Review Process Schedule (Class I Contracts)		
Timeframe	Proposed Activity Schedule	Responsibility
Letting (Wed)	<ul style="list-style-type: none"> •Review Letting results •Send Post Bid Evaluation Form request letters (as required) 	Central Office Estimates
	<ul style="list-style-type: none"> •Verification of bid data 	Central Office Contracts Administration
	<ul style="list-style-type: none"> •Review/revise automated reports sent via email 	District Estimates Office
Day 1 (Thu)	<ul style="list-style-type: none"> •Prepare and email appropriate bid review documents to the contractor •Request contractor to return completed bid review document by close of business on Monday(Day 5) •Begin pay item quantity verification (unbalanced bid review form) •Email to Project Manager 	District Estimates Office
Day 2 (Fri)	<ul style="list-style-type: none"> •Begin desk review letter header information (example: scope, low bid, estimate, number of bidders, etc.) •Perform additional bid review analysis as needed 	District Estimates Office
Days 3 & 4 (Sat/Sun)	Weekend	
Day 5 (Mon)	<ul style="list-style-type: none"> •Continue Day 2 activities (if needed) •Review bid review documents by contractor or project manager (if available) 	District Estimates Office
Day 6 (Tue)	<ul style="list-style-type: none"> •Review bid review documents by contractor or project manager; contact contractor or project manager if clarification is needed •Follow up with contractor or project manager for status on documents not received •Begin loading notice to contractor, unbalanced bid review, and post bid evaluation forms, as applicable, on District SharePoint site •Begin preparation of desk review letters 	District Estimates Office
Day 7 (Wed)	<ul style="list-style-type: none"> •Continue Day 6 activities (if needed) •Finalize desk review letters and post on District's SharePoint site 	District Estimates Office
Day 8 (Thr)	<ul style="list-style-type: none"> •Continue Day 6 & 7 activities •Load all bid review documents by COB 	District Estimates Office
	<ul style="list-style-type: none"> •Begin review of bid review documents and follow up with District as needed 	Central Office Estimates
Day 9 (Fri)	<ul style="list-style-type: none"> •Complete review of bid review documents •Post all bid review document on Central Office's SharePoint for Technical Review (TRC) and Contract Awards (CAC) committees •Notify TRC & CAC that documents are available 	Central Office Estimates
Day 10 & 11 (Sat/Sun)	Weekend	
Day 12 (Mon)	<ul style="list-style-type: none"> •Review bid documents on Central Office's SharePoint site 	Technical Review & Contract Awards Committees
Day 13 (Tue)	<ul style="list-style-type: none"> •Technical Review Committee meeting @ 2:00 pm 	Technical Review Committee
Day 14 (Wed)	<ul style="list-style-type: none"> •Contract Awards Committee meeting @ 1:00 pm 	Contracts Award Committee
	<ul style="list-style-type: none"> •Post award notice 	Central Office Contracts Administration

IMPLEMENTATION: This bulletin is effective with the Central Office lettings (class 1 contracts) beginning in June 2014. District contract lettings (class 7) will be considered for implementation at a later date due to the variety of letting dates in each District.

If there are any questions concerning this bulletin, please contact Ken Richardson or Christine Shafik.