PD&E Scope of Services

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Outline

1. Overview of the Standard Scope for PD&E Studies
2. Standard Scope of Services Tool Demonstration
3. Scope of Services for Concurrent Design and PD&E phases
PD&E Standard Scope of Services Overview
Why Standard Scope of Services?

Both Department and Consultant Project Managers will utilize the S&SHE Guide Documents in scoping and negotiating all consultant contracts for PD&E Studies and Design Services.

AUTHORITY:
Sections 20.23(3)(a) and 334.048(3), Florida Statutes (F.S.)

REFERENCES:
Acquisition of Professional Services, Topic No. 375-030-002 Section 287.065, F.S.

SCOPE:
Both Department and Consultant Project Managers will utilize the S&SHE Guide Documents in scoping and negotiating all consultant contracts for PD&E Studies and Design Services.
Standard Scope of Services for PD&E Studies

Highway Projects

FTA Funded Transit Projects
Districts have FOUR options to procure PD&E studies

1. PD&E contract followed by a Design contract (Sequential phases)
2. One contract with both PD&E and Design (Concurrent phases)
3. PD&E contract with an option for Design
4. Two overlapping contracts (PD&E and Design) procured simultaneously or separately
Structure of the PD&E Standard Scope

1. PURPOSE
2. PROJECT DESCRIPTION AND OBJECTIVES
3. PUBLIC INVOLVEMENT
4. ENGINEERING ANALYSIS
Structure of the PD&E Standard Scope

5. Environmental Analysis and Reports
6. Environmental Document
7. Method of Compensation
8. Design Services
Scope of Services Template and Guidelines

Standard Scope of Services Template

- A PDF document
- Default language with instructions and notes
- Scope of Services is developed using a web-based application

Flexibility to Modify Task in the Tool

- Scope activities with enough detail to meet project objectives
- Eliminate or scale down activities that were previously completed
- Modify activities to be done by others

https://www.fdot.gov/designsupport/Scope/
Instructions to Prepare Scope of Services

- Defines roles and responsibilities
- Emphasizes collaboration between various offices/disciplines
- Highlights important considerations before preparing scope
- Explains how to use Scope of Services Development Tool
- Discusses Scope of Services Structure in detail
- Explain information need to develop each section of the Scope

Describes how to develop a Scope of Services for PD&E Studies

March 20, 2017
Demonstration of the Standard Scope Tool
Requesting Access

• District Environmental Leadership authorizes accounts via email to help@fla-etat.org
  • FDOT District employees – send an email to Environmental Administrator, Environmental Manager, or Project Development Manager
  • Consultant project team members – go through FDOT project manager, who will make requests to District Environmental Leadership

• For each account, include:
  • Name
  • Email address
  • SWEPT roles (s)
Scoping Tool Demonstration

https://www.fla-etat.org/est/swept/
Scoping Tool Demonstration

User can provide or change answers (Yellow Background)

Note to Scope Developer (Blue Background)
Scoping Tool Demonstration

- Click on Check for Completeness and Save
- Save a Word Document
- Review unanswered questions
- Create a Word Document of the Scope of Services
Scope of Services for Concurrent Design and PD&E Phases
Concurrent Phases

Both PD&E and Design phases are procured in one Contract—i.e. ONE contract with both PD&E study and Design services

Combined Phases (PD&E Study is combined with Design services) in ONE contract

Concurrent Phases is NOT a PD&E Study with an option for Design services
What is the Standard Scope of Services?

• Public Involvement
• Roadway Analysis
• Drainage Analysis
• Utilities
• Structure Analysis
• Signalization Analysis
• ITS Analysis
• Lighting Analysis
• Landscape Analysis
• Survey
• Photogrammetry
• Geotechnical
• Noise
• Contamination
• Documentation

In which phase should we effectively scope these activities?

Review:
• District Scopes
• Other States Processes
# Approach to Modifying Scope of Overlapping Activities

## Goal

Prepare **ONE Standard Scope of Services with Design and PD&E Study combined**

## Approach

- **Maintain the integrity of Activities in the Roadway Standard SoS—Where can we place PD&E activities?**
- **Eliminate redundancies from overlapping activities—Scope either as Design Activity or PD&E Activity**

- **Did not want to create a significant learning burden** to practitioners
- **Learned from other states processes** that overlap Design with PD&E
Fitting in PD&E Activities into Design

**Preliminary Design**
- Roadway
- Structure
- Pavement
- Drainage
- Traffic
- Utility

**PD&E Study**
- Environmental Studies
- Alternatives Analysis
- Environmental Document

**Public Involvement**

**Phase II Plans**
- NEPA Approval

**Final Design**
- Roadway
- Structure
- Pavement
- Drainage
- Traffic
- Utility

**R/W Acquisition**

**Permits**

**Public Involvement**

**PSE**
Fitting in PD&E Activities into Design

The District and Consultants can schedule overlapping activities depending on the project's context. Flexibility in scheduling these activities.
Typical Projects that can have Concurrent PD&E and Design Phases

Projects with fewer environmental issues and lesser engineering complexity

- Class of Action = Type 2 CE or SEIR
- Roadway projects where only one Build Alternative is evaluated against No-Build Alternative
- Projects that do not involve complex interchanges/intersection modifications
- Bridge replacement projects that do not involve construction of segmental bridges or movable span
- Both PD&E and Design must have been programmed concurrently
- Final Design (Phase III and Phase IV) will not start until NEPA is approved

Remember
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- PD&E tasks were merged into the Design SOS to create a combined scope.
- The two scopes have very similar outlines. The majority of the changes to the outline are in the first three sections.
- The Task Team efforts focused on combining tasks and modifying text to remove redundancies for each scope section.
The Staff Hour Estimates and Staff Hour Estimates Guidelines were created for the combined scope and tasks.

Careful consideration was given to make sure that hours ranges and work descriptions took into account effort for both PD&E and Design.

Some hours increased or decreased depending on the modifications.
Tools and Guidance

Scope of Services for Concurrent PD&E and Design Phases

USER'S QUICK GUIDE

PURPOSE

The Goal of this supplement is to provide Florida Department of Transportation (FDO) Project Managers and staff from the Design and Environmental Offices with a clear understanding of the Standard Scope of Services and Staff Hour Estimation Guidelines for projects with concurrent Project Development and Environment (PD&E) and Design phases. The supplement provides a roadmap for managing concurrent project development activities and shows how to ensure that the PD&E and Design phases are coordinated effectively.

APPLICABILITY

Projects that meet the criteria for concurrent PD&E and Design phases are:

- Projects that are part of a larger system or network
- Projects that are subject to environmental review
- Projects that require coordination with other agencies

PROJECT MANAGER RESPONSIBILITIES

The Project Manager is responsible for:

- Coordinating the scope of services for the project
- Communicating with other agencies and stakeholders
- Ensuring that the project is completed on time and within budget

USER'S QUICK GUIDE

The Standard Scope of Services for Concurrent PD&E and Design phases is designed to provide a comprehensive set of services that are necessary to complete the project within the required time frame.

OUTLINE OF THE STANDARD SCOPE OF SERVICES FOR CONCURRENT PD&E AND DESIGN PHASES

- Project Management
- Environmental Review
- Public Involvement
- Design Services
- Construction Services
- Staff Hour Estimation Guidelines

RESOURCES

The Standard Scope of Services and Staff Hour Estimation Guidelines can be found on the FDOT website.
Questions
Thank you!

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