

## Estimating Presentation

Robert Reid Jr. - Engineering Services Assistant Office Head

- Estimating Section
- Value Engineering

Troy Patterson - Chief Estimator

David English – Lead Estimator

- District 3, 4, 5

Doug Torres – Lead Estimator

- District 1, 2, 6, 7

Ⓟ 30 mins

## Presentation

### Robert

Opening remarks and introduction of Estimators

### Doug

Discuss the role and responsibilities of the Construction Liaison.

### Topics

- Timeline (when the letting process starts for Liaison)
- Needs of Liaison from PM or Designer (Plans, Earthwork, CES, Special Provisions)
- Duties of Liaison
  - Review Plans
  - Visit project (all project in their district, excluding Resurfacing Projects)
    - Look for Clearing (Types and Amount)
    - Insure plans match what is on ground
    - Look at existing traffic
    - Look for problems that may affect construction
    - Check for Access to Bridges, Culverts
- Office Work
  - Complete scratch estimate on all required items
    - Usually 20-30% of items (Aprox. 80% of total project costs)
  - Price the other 70-80 % of Items using Bid History
    - Look at Qty, # of times used, Area Used, Project Type Used on
  - Enter ALL prices into CES
- Other Duties
  - Item Research
  - Material Price Updates (from vendors, manufactures, installers)

- Production Rate Updates (from site visits, vendors, manufactures, installers)
- Site visits to On-Going construction projects
- Update of equipment prices and Labor rates
- Annual Updates of In-House Designed Projects
  - Same process as Let Projects with the exception that they do not update the history items. Only do the scratch estimates

## David

Discuss the Role and Responsibilities of the Lead Estimator

## Topics

- Timeline (when the process starts)
    - About a week behind the Liaison, to give them time to complete an estimate
  - Needs of Lead
    - Completed Estimate from Liaison
    - Set of Plans
    - All earthwork, special provisions
  - Office Work
    - Check With PM or Designer for revisions and any qty or earthwork changes
    - Review Plans (complete review just as the Liaison)
    - Review Liaison Estimate and Update if Needed
      - This review is for consistency in estimate
      - Ensure all items that needed a scratch estimate was completed
      - Ensure Equipment and Personnel used in the work-up can reach the production for any given item
      - Check History Priced items to ensure correct procedures were used in determining the best price is being used.
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- Update The CES File
  - Research of items
    - Costs, Installation
  - Complete Bridge Estimates
  - Site Visits
  - Update Labor and Equipment Prices
  - Perform Special Tasks assigned by Chief Estimator
  - Attend Estimating Committee Meetings
  - In the Absences of the Chief Estimator, Present all estimates to the to the Estimating Committees
  - Perform Supervisor Duties

## Troy

Discuss the role of the Chief Estimator

### Topics

- Timeline of 1625 Estimates
- Timeline of Let Estimates
- Duties
  - At time of 1625
    - Compile all total Costs for each Estimate in a given Letting
    - Add all add-ons to get total allotment for the project
      - ❖ Utility Cost
      - ❖ Liquid AC adjustments
      - ❖ E&I
    - Distribute total cost to OFM at 12.5 weeks before scheduled Letting
  - At time of Letting
    - Review all projects for the current letting
    - Check current estimate and ensure all qty's used in work-up has latest qty
    - Review all estimates for consistency, accuracy
    - Review plans for any additions or subtractions to construction activities
    - Update material prices to reflect any changes from time of original estimate
    - Update Costs in CES
  - Tuesday before the Letting, meet with Pre Let estimating Committee and present the committee with the Final Engineer's Estimate and discuss how the estimate was prepared and all thoughts and concerns for each project
  - Letting Date..Review and Analyze all bids on each Let projects
  - Week after Letting
    - Meet with Post Let Estimating Committee to review bids and discuss issues and make recommendations for Award/Reject of all projects
  - Two weeks after letting..Attend DBE/Award Meeting..Distribute Post Let Estimating Committee Recommendations along with all totals for each project to Committee members. Answer any questions from committee concerning the estimate.
    - Distribute Final Costs and Award or Reject to all concerned
- Send reminders of 18 week plans due date
- Perform special requests from many different offices
- Item Research
- Input annual updates of Estimates
- Keep records of all estimates

# FY 2013 Estimates

- Projects Estimates
- Total \$ Estimated
- Total \$ for Awarded Projects
- % of Estimate vs Low Bid for Awarded Projects
- % of Estimates vs All Bids
- Total # of Bidders

## Concerns

Plans being turned in on time

CES reflecting plans

CES Control

Correct Earthwork Qty's

Obtaining all Special provisions

Late Issuing of qty changes or construction activity changes

Communication between the PM and Estimating section concerning Let status

Response time to questions

Moving Projects in and out of Lettings

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