This Quick Guide helps Florida Department of Transportation (FDOT) Project Managers and staff from the District Design and Environmental Offices understand the Standard Scope of Services and Staff Hour Estimation Guidelines for projects with concurrent Project Development and Environment (PD&E) and Design phases. These projects have both phases procured under one contract as major work items. The intent of performing PD&E and Design phases concurrently is to streamline the project development process by realizing efficiencies from early identification of project scope and issues through cross-functional reviews and elimination of rework or redundant activities during PD&E and Design phases. A successful streamlining of the project development process requires effective integration of planning, engineering and environmental functions through continuous coordination between staff from Planning, Design, and Environmental offices. Through such collaboration, the development of the project can realize a balanced consideration of engineering and environmental issues.

**Type 2 CE and SEIR projects that MAY be scoped and procured with concurrent PD&E and Design phases are:**

- Roadway projects where only one Build Alternative is evaluated against the No-Build Alternative
- Projects that do not involve complex interchange or intersection modifications
- Bridge replacement projects which do not involve segmental concrete bridge or movable span

**Projects that ARE NOT scoped and procured with concurrent PD&E and Design phases:**

- All projects involving segmental concrete bridge or movable span
- All projects which require preparation of Environmental Impact Statement (EIS) or Environmental Assessment (EA)

**APPLICABILITY**

Typical projects that would combine PD&E and Design phases are those with fewer environmental issues and lesser degree of engineering complexity. Therefore, PD&E studies for some Type 2 Categorical Exclusions (CEs) or State Environmental Impact Reports (SEIRs) may be procured concurrently with the Design phase. The decision to overlap PD&E and Design phases must come from the Work Program Development process where both phases should be programmed and funded in the same year.

**PROJECT MANAGER RESPONSIBILITIES**

The Project Manager is responsible for developing the Scope of Services for the project as well as gathering information essential to scope the project. To clarify and focus the scope to the issues that are relevant to the project while achieving project goals, the Project Manager may modify (or customize) the scope language with project specific information. The Project Manager should pay close attention to work items that support both PD&E and Design activities to include data and analysis necessary for both phases and avoid repetition of work. Additionally, the Project Manager is responsible for identifying the project team members, conducting the scoping kickoff meeting, communicating with relevant offices concerning their scope of work, and reviewing the required budget and initial schedule to perform PD&E study and Design services concurrently.
FIRST THINGS FIRST

The Project Manager should use the scoping kickoff meeting to obtain a consensus on major items such as preliminary alternatives (including line and grade) and key environmental issues with a goal of eliminating or minimizing rework, scope creep, schedule slips, cost overruns and other risks by resolving or addressing issues before the development of the project begins. The scoping kickoff meeting should include staff from Design and Environmental offices, and other offices such as traffic operations, work program, right of way, construction, and planning that are essential for development of the project. Ideally, the scoping kickoff meeting would discuss the purpose and need, preliminary alternatives, design criteria, scope, and degree of engineering complexity of the project.

Specifically, before preparing the Scope of Services for concurrent PD&E and Design phases, the Project Manager should do the following:

- **Understand the Purpose and Need for the project and confirm the project limits.**
- **Confirm both phases are funded concurrently in the Adopted Work Program.**
- **Review the Efficient Transportation Decision Making (ETDM) Programming Screen Summary Report to become familiar with the environmental issues that the project will address.**
- **Obtain and review previously completed planning studies.**
- **Request data from Planning, Safety, Roadway, Structures, Survey, and Mapping, and other offices as appropriate.**
- **Obtain and review project scoping or Statewide Acceleration Transformation (SWAT) meeting notes and recommendations.**
- **Review the initial project schedule and budget, and adjust planned dates as needed.**
- **Identify potential project risks (both project development and construction).**
- **Obtain input from subject matter experts on project issues that may affect the scope.**

ACTIVITIES THAT OVERLAP PD&E AND DESIGN PHASES

Activities that overlap both phases are scoped in either PD&E Study or Design phase to allow for the most logical way of minimizing linear sequencing of tasks to expedite project development, reduce rework, eliminate redundancy, and shorten schedules.
The outline of the Standard Scope of Services for concurrent PD&E and Design phases includes major changes in the first three sections as follows:

• Section 2 of the “standalone” Scope of Services for Design Services is merged with Section 1.
• Section 3 is retitled Section 2 and is broken into Section 2a. Project Common and General Tasks and Section 2b. Public Involvement.
• Section 3 is repurposed for PD&E tasks with three subsections: 3a. Preliminary Engineering Analysis, 3b. Environmental Analysis and Report, and 3c. Environmental Document.

Additionally, Section 8 includes only tasks to prepare environmental permits. Environmental clearance and re-evaluation are merged into Section 3c.

Final Design activities (beyond Phase II Plans) for federal projects MUST NOT proceed until NEPA document is approved.
An Example of Modifications to Staff Hour Estimation Guidelines

<table>
<thead>
<tr>
<th>Existing Design Scope of Services Activity</th>
<th>Description of Change into Concurrent PD&amp;E and Design Scope of Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Purpose</td>
<td>Combined with Project Description</td>
</tr>
<tr>
<td>2 Project Description</td>
<td>Added PD&amp;E related information</td>
</tr>
<tr>
<td>3 Project Common and Project General Tasks</td>
<td>Broken into 2a. Project Common and Project General Tasks and 2b. Public Involvement</td>
</tr>
<tr>
<td>4 Roadway Analysis</td>
<td>Added preliminary engineering tasks</td>
</tr>
<tr>
<td>6a Drainage Analysis</td>
<td>Added preliminary engineering tasks</td>
</tr>
<tr>
<td>8 Environmental Permits</td>
<td>Moved environmental clearance to PD&amp;E task</td>
</tr>
<tr>
<td>10 Structures - Bridge Development Report</td>
<td>Added preliminary engineering tasks</td>
</tr>
<tr>
<td>15 Structures - Segmental Concrete Bridge</td>
<td>NOT APPLICABLE for Concurrent PD&amp;E and Design Scope</td>
</tr>
<tr>
<td>16 Structures - Movable Span</td>
<td>NOT APPLICABLE for Concurrent PD&amp;E and Design Scope</td>
</tr>
<tr>
<td>32 Noise Analysis and Noise Barrier Design</td>
<td>Added PD&amp;E noise analysis</td>
</tr>
</tbody>
</table>

The Standard Scope of Services for concurrent PD&E and Design phases follows the outline of the Scope of Services for Design Services where some PD&E activities were merged or combined with design activities to the extent practical and redundancies removed as appropriate.

Staff Hour Estimation Guidelines and Forms for projects with concurrent PD&E and Design phases have been updated to reflect activities and tasks from the Standard Scope of Services. Ranges of staff hours and their descriptions include efforts for combined PD&E and Design activities while removing potential redundancies on merged activities. As such, ranges of staff hours for some activities have either increased or decreased from their corresponding hours of standalone PD&E study or Design services.

**An Example of Modifications to Staff Hour Estimation Guidelines**

<table>
<thead>
<tr>
<th>Task No.</th>
<th>Task</th>
<th>Units</th>
<th>Staff Hour Range</th>
<th>Basis for Staff Hour Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>2b</td>
<td>PD&amp;E and Design Public Involvement</td>
<td>LS</td>
<td>See Basis for Staff Hour Range</td>
<td>Itemized tasks in this activity cover effort to support both PD&amp;E and Final Design</td>
</tr>
<tr>
<td>2b</td>
<td>Public Involvement Plan</td>
<td>LS</td>
<td>2432 to 80112</td>
<td>This task involves the research and coordination necessary to complete the public involvement plan as per Part 1, Chapter 11 of the PD&amp;E Manual and Public Involvement Handbook, and also incorporates the requirements of the Community Awareness Plan per the FDOT Design Manual in the project. Issues such as how information will be disseminated and gathered from the public are to be considered. This does not include website development and updating. Range depends on project length, number of jurisdictions, nearby properties, stakeholders, and controversy potential.</td>
</tr>
</tbody>
</table>

**RESOURCES**

The Standard Scope of Services and Staff Hour Estimates for projects with concurrent PD&E and Design phases can be found on the FDOT Scope of Services and Staff Hour Estimation page.

https://www.fdot.gov/designsupport/Scope/default.shtm