

Learning Objective 1: PS&E Submittal Request Checklist

| Areas to Focus on . . . | Target Participants | Resources Available Today |
|--|--|--|
| <p>Design exceptions – how to determine what is needed, and plan for them in the project timeline</p> <ul style="list-style-type: none"> • When they are applicable • Where to find info on federal requirements • Determining when ODOT must approve the exception, when the local agency can approve, or when you need both | <p>Program Manager Project Manager (Design) Project Manager (Construction) Procurement</p> | <ul style="list-style-type: none"> • LAG • PS&E Submittal Request Checklist • ODOT General Design Exception Request Form • LPIF Guide, Templates, and Examples |
| <p>Public Interest Findings</p> <ul style="list-style-type: none"> • When they are necessary (including anticipated items in Section 5a) • Various types/applications of LPIFs • How to make a request after project bid let date • Templates and examples | | |

For Discussion



1. While much of the PS&E Submittal Completeness Checklist is straightforward, it has been noted that there are a few items such as Design Exceptions and Public Interest Findings that can lead to questions. Do the “Areas to Focus on” listed above meet the priority needs for this Learning Objective?
 - *What is most challenging about preparing the PS&E Checklist and supporting documentation?*
 - *Are there things that could be improved in the process or the checklist that would address the Learning Objective?*
2. What are your go-to resources when you need to complete the checklist (e.g., when you are determining whether an LPIF is applicable)?

Learning Objective 1: PS&E Submittal Request Checklist (cont'd)

| Areas to Focus on . . . | Target Participants | Resources Available Today |
|--|--|---|
| Handling mid-stream changes <ul style="list-style-type: none"> The various factors that will cause a PS&E package to be revised (or not) How to get up-to-date information about changes Process steps for making changes | Program Manager Project Manager (Design) Project Manager (Construction) Procurement | <ul style="list-style-type: none"> LAG |
| Staying up-to-date on Federal requirements <ul style="list-style-type: none"> How to access and use available resources on changes | | |
| Finding and applying the most up-to-date construction specifications to the project <ul style="list-style-type: none"> How to ensure the right version of specifications and general conditions is being used | | |

For Discussion



3. What are examples of the kinds of challenges you have in each of these areas?
 - *What are your "lessons learned" in resolving them?*
4. What are your go-to resources for getting the latest information on federal requirements and construction specifications?

Learning Objective 2: PS&E Schedule that Meets STIP Phase Let Date

| <i>Areas to Focus on . . .</i> | <i>Target Participants</i> | <i>Resources Available Today</i> |
|--|---|---|
| Issues that are unique to federally-funded projects, e.g.: <ul style="list-style-type: none"> • Schedule completion date aligned with the contract document/180.50 • Timeline aligned to the Environmental permitting and construction completion date | Program Manager Project Manager (Design) Project Manager (Construction) | <ul style="list-style-type: none"> • LAG |
| Common stumbling blocks in getting components of the submittal ready, e.g.: <ul style="list-style-type: none"> • Getting on Mobility Advisory Committee’s agenda to get a signed Mobility Considerations Checklist • Time necessary to get ROW certification | | |
| Good “rules of thumb” in estimating timelines | | |

For Discussion



1. What are examples of the kinds of challenges or issues you have had in building a schedule?
 - *What are some of your “lessons learned” in resolving them?*
2. What are your go-to resources for estimating the time required for project elements?

Learning Objective 3: Cost Estimating

| <i>Areas to Focus on . . .</i> | <i>Target Participants</i> | <i>Resources Available Today</i> |
|---|---|--|
| Understanding estimating concepts and best practices for federal-aid projects <ul style="list-style-type: none"> • Calculation issues, e.g., inaccurate quantities and number rounding • Use of Pay Item issues • Project-specific pricing, unique elements • Saving estimating worksheets in ProjectWise | Program Manager, Project Manager (Design), Procurement | <ul style="list-style-type: none"> • 2023 Summer Meeting presentation (J. Wolf) • FHWA Core Curriculum |
| Using Cost Estimate form 734-5096 <ul style="list-style-type: none"> • Common quality assurance issues • Technical support for the Excel format • Accuracy in planning contingency amounts | | |
| Understanding bid price analysis concepts and best practices <ul style="list-style-type: none"> • Mitigating common issues as a result of today’s dynamic economy | | |
| Using AWP Estimation <ul style="list-style-type: none"> • How to get access • Using ODOT bid price history as a resource | | |

For Discussion



1. Do the “Areas to Focus on” listed here meet the priority needs for this Learning Objective?
 - *What is most challenging about preparing a cost estimate?*
 - *Are there things that could be improved in the process or the Excel tool that would address the Learning Objective?*
2. What are your go-to resources when you need to complete a cost estimate?