

<b>Note: Contract Administrator will be entered by Procurement</b>	Project Manager:
Project Title:	Contract Administrator:
Requisition #	SB Percentage Goal:

New Contract/Procurement Yes or No	Circle	Date:
Contract Modification Yes or No	Circle	Requestor:
Contract # being modified:		Department:
APP#		Phone/E-Mail:

Cost Estimate: \$ _____	FTA Funded	Circle Yes or No
Please validate the estimate by utilizing the following applicable pages.	<p><b>Please note:</b> <i>The Project Manager is to provide Procurement with a detailed Scope of Work; an approved APP; Requisition; and detailed Cost Estimate. The project Manager has five (5) business days to provide the detailed information to procurement. Procurement will not begin the solicitation process without the information listed above. A Scope of Work Checklist; Estimate Guide, and Estimate Forms are provided as attachments to assist the Project Manager.</i></p>	

Comments:

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**PART I**

**Summary Guide**

The attached Scope of Work contains at a minimum the following:

<b>For Materials:</b>	<b>For Consultants:</b>
<input type="checkbox"/> Quantity of items and/or materials required	<input type="checkbox"/> List of responsibilities to be performed
<input type="checkbox"/> A detailed description of each item required	<input type="checkbox"/> Detailed list of deliverables required
<input type="checkbox"/> Specs/drawings for materials required	<input type="checkbox"/> Anticipated contract term and start date
<input type="checkbox"/> Date materials are required	<input type="checkbox"/> Location of Project
<input type="checkbox"/> Delivery address & METRO's point of Contact	<input type="checkbox"/> Project Manager's contact information
<b>For Contractors:</b>	<input type="checkbox"/> Anticipated Contract Term and Start Date
<input type="checkbox"/> A detailed list of tasks to be performed	<input type="checkbox"/> Project Location
<input type="checkbox"/> Specs/drawings/pictures of job site or projected results of contractor's tasks.	

Note: The above are applicable if a firm fixed price contract is being contemplated. (Exhibit 20 in Procurement Manual identifies an example of sample specifications as a point of reference.)

(Insert Scope of Work here)

**PART II**  
**Estimate Guide**

<b><u>Estimate Type</u></b>	<b><u>Items to Include</u></b>	<b><u>Where to find supporting information</u></b>
Goods/Equipment	<ol style="list-style-type: none"> <li>1. Product needed</li> <li>2. Quantity</li> <li>3. Unit Price</li> <li>4. Markups-overhead-profit</li> <li>5. Delivery Schedule desired</li> <li>6. Warranty</li> </ol>	<ol style="list-style-type: none"> <li>1. Vendor/Market Survey</li> <li>2. Current/Past contracts for same or similar product (s)</li> <li>3. Contract Administrator can assist with obtaining historical price/cost data.</li> </ol>
Services (Other than A & E)	<ol style="list-style-type: none"> <li>1. Tasks you want accomplished</li> <li>2. Types of Resources required (Project Manager/Deputy PM Senior Engineer/Supervisor, etc.</li> <li>3. Estimated hours by position</li> <li>4. Salary/billing rates applied</li> <li>5. Prevailing wage rate category applied</li> <li>6. The overhead and profit rates</li> <li>7. Direct expenses</li> <li>8. Completion Schedule</li> </ol>	<ol style="list-style-type: none"> <li>1. Current/Past contracts for same or similar services</li> <li>2. Other departments doing similar work</li> <li>3. Contract Administrator can assist with obtaining historical price/cost data.</li> </ol>
Architects, Engineers and Designers	<ol style="list-style-type: none"> <li>1. Tasks you want accomplished</li> <li>2. Types of Resources required (Project Manager/Deputy PM Senior Engineer/Supervisor, etc.</li> <li>3. Estimated hours by position</li> <li>4. Salary/billing rates applied</li> <li>5. Prevailing wage rate category applied</li> <li>6. The overhead and profit rates</li> <li>7. Direct expenses</li> <li>8. Completion Schedule</li> </ol>	<ol style="list-style-type: none"> <li>1. Current/Past contracts for same or similar services</li> <li>2. Other departments doing similar work</li> <li>3. Contract Administrator can assist with obtaining historical price/cost data.</li> </ol>
Construction	<ol style="list-style-type: none"> <li>1. Product Needed</li> <li>2. Labor (at a minimum use Davis Bacon)</li> <li>3. Materials</li> <li>4. Bonds</li> <li>5. Insurance</li> <li>6. Mobilization</li> <li>7. Equipment</li> <li>8. Markups; Fringes, overhead, profit</li> <li>9. Completion Schedule</li> </ol>	<ol style="list-style-type: none"> <li>1 Current/Past contracts for same or similar projects</li> <li>2 Davis Bacon Wage Rates</li> <li>3 Means/Blue Book</li> <li>4 Contract Administrator can assist with obtaining historical price/cost data.</li> </ol>

Submitted by:	Date	APP#	Req.#
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**ARCHITECTURAL AND ENGINEERING (A & E) SERVICES**

**WORK ESTIMATE SHEET  
PART II A**

**Project Name:**

<b>Direct Labor</b>	<b>Hours</b>	<b>Rate/Salary</b>	<b>Total Labor Hours/Rate/Salary</b>
Project Manager			\$0.00
Senior Engineer			\$0.00
Senior Engineer			\$0.00
<b>List applicable labor categories:</b>			
Other staff			\$0.00
Other staff			\$0.00
Other staff			\$0.00
Other staff			\$0.00
Other staff			\$0.00
Other staff			\$0.00
Other staff			\$0.00
Other staff			\$0.00
Other staff			\$0.00
<b>Total Direct Labor</b>			\$0.00
	<b>Overhead</b> _____ %		<b>Total Overhead Costs</b> <b>Overhead x Total Labor</b>
<b>Overhead/Indirect Costs</b>	_____ %		\$0.00
<b>Fixed Fee</b> <b>(Limited to 10% of the total labor and overhead expense)</b>	_____ %		\$0.00
<b>Direct Expenses</b>			\$0.00
Travel (Lump Sum)			\$0.00
Travel (Per mile)			\$0.00
Meals			\$0.00
Lodging			\$0.00
Postage			\$0.00
Telephones			\$0.00
Copies			\$0.00
Other Direct Expenses (Describe)			\$0.00
<b>Total Direct Expenses</b>			\$0.00
<b>Total Estimated Cost</b>			<b>\$0.00</b>

Submitted by: \_\_\_\_\_ Date: \_\_\_\_\_ APP# \_\_\_\_\_ Req# \_\_\_\_\_

**SERVICES**

WORK ESTIMATE SHEET  
PART II B

Project Name: \_\_\_\_\_

Note: If federal funds are used, cost principles of FAR Part 31 (for cost reimbursement type contracts) apply. See website [www.arnet.gov/far](http://www.arnet.gov/far) for additional information.

Labor Type	# of Hours	Billing Rate*	Total Labor Hours X Billing Rate
Site Supervisor			\$0.00
Journeyman 1			\$0.00
Journeyman Assistant			\$0.00
<b>Provide Specific Labor Categories:</b>			
Other			\$0.00
Other			\$0.00
Other			\$0.00
Other			\$0.00
Other			\$0.00
<b>Total Labor</b>			<b>\$0.00</b>
Other Expenses	QTY	Unit Rate	Total Cost Hours x Unit Rate
Training			\$0.00
Insurance			\$0.00
Warranty			\$0.00
Transportation			\$0.00
Equipment (Rental/Lease)			\$0.00
Repair Job			\$0.00
Other (Describe)			\$0.00
<b>Total Estimated Services:</b>			<b>\$0.00</b>

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\*Use current prevailing wage rates.

**EQUIPMENT ESTIMATE SHEET**

**PART II c**

**Project Name:**

Quantity	Item Description	Unit of Measure (Each, box, ft, etc)	Unit Price	Total Price
	Item		\$0.00	\$0.00
	Item		\$0.00	\$0.00
	Item		\$0.00	\$0.00
	Item		\$0.00	\$0.00
	Item		\$0.00	\$0.00
	Item		\$0.00	\$0.00
	Training		\$0.00	\$0.00
	Warranty		\$0.00	\$0.00
	Handling Fee (If Applicable)		\$0.00	\$0.00
	Shipping (If Applicable)		\$0.00	\$0.00
	<b>Total Equipment Estimate (Rental/Lease Equipment)</b>		<b>\$0.00</b>	<b>\$0.00</b>

Note: Multiply the quantity by the Unit Price to determine the Total Price

Submitted by:	Date:	APP#	Req#
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**SCOPE OF SERVICES CHECKLIST**

**Part III**

The Scope of Services (sometimes referred as Statement of Work) generally consists of the following:

- A) Project Scope
- B) Reference Documentation
- C) Technical Requirements
- D) Deliverables/Milestones

	Item	Yes	No	N/A
A	<b>Scope:</b> The scope section is an overview of the Project Scope and should emphasize the most important aspects of the requirement rather than minor details. It should identify the objective or purpose of the requirement; it should help the contractor understand the magnitude of the effort to be performed; and it should also define the contractor’s performance responsibilities. The scope should be clear and consistent, and easily understood by all who read it.			
1.	Will the contractor understand the magnitude of the requirement and have a basic understanding of what is being requested?			
2.	Is the scope consistent with the tasks or activities specified with the end result to be obtained?			
3.	Does the scope emphasize the most aspects of the requirements?			
	<b>Remarks:</b>			

	Item	Yes	No	N/A
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B.	<p><b>Reference Documents:</b> This section lists all documents which include the technical requirements that contractor will have to comply with in the performance of the scope of services (METRO policies, state and federal laws, state and city requirements' etc.)</p>			
1.	Is the applicable document properly cited? (Correct Volume No; Dates; Revision No's, etc.)			
2.	If only portions of the document apply, have you clearly stated which portions apply?			
3.	Are the documents cited really pertinent to the tasks required?			
4.	Do any standard specifications or paragraphs apply in whole or in part? If so, are they properly cited?			
5.	<p>Are documents referenced by:</p> <ul style="list-style-type: none"> <li>• Type (specification, code, etc.)</li> <li>• Number/version</li> <li>• Title</li> <li>• Date</li> </ul>			
	<p><b>Remarks:</b></p>			

	Item	Yes	No	N/A
C.	<b>Technical Requirements:</b> This section should identify what the contractor is required to do and NOT how the contractor should accomplish the effort. Technical requirements are generally identified as major tasks and sub tasks. All major tasks and sub tasks need to be defined in sufficient detail so that the contractor clearly knows what is required and the Authority knows when and if the Contractor complied with the requirements. THE SOS should identify the tasks required, and the associated performance measurement.			
1.	Are the contractor’s responsibilities clearly defined/identified?			
2.	Are the tasks presented in a chronological order or in some logical order?			
3.	Is the SOS specific enough to estimate the probable costs and the contractor’s ability to determine the levels of expertise, manpower and other resources required to accomplish the tasks?			
4.	Are the performance standards/criteria: <ul style="list-style-type: none"> <li>• Necessary?</li> <li>• Realistic?</li> <li>• Relevant?</li> <li>• Specific?</li> <li>• Verifiable?</li> <li>• Objective?</li> <li>• Measurable?</li> </ul>			
5.	Have all elements of quality control, appropriate licenses, inspection, testing and acceptance been identified?			
6.	Have the milestones been identified?			
7.	Does the SOS require contractor to get permission from; coordinate with; or provide information/data to the appropriate manager within the Authority?			
8.	If brand name or equal descriptions are used, are the salient physical and functional characteristics of the brand name included? Note: Brand Name Justification Form must accompany SOS.			
	<b>Remarks:</b>			

	Item	Yes	No	N/A
D.	<b>Deliverables/Milestones/General Comments: This section should identify the data/reports required to be submitted by the contractor.</b>			
1.	Are the reports/data required clearly defined?			
2.	Are the quantities and timelines for deliveries appropriately stated and defined?			
3.	Has the cost been considered fair and reasonable for the work considered?			
4.	Have all data requirements been identified in the appropriate exhibits?			
5.	Does the SOS create an organizational conflict?			
6.	Will a specific contractor receive an unfair competitive advantage?			
7.	Are acronyms and abbreviations spelled out the first time they are used?			
8.	Has SOS/SOW been checked for grammar and spelling?			
9.	Are sentences written in a clear, short and concise format?			
10.	Are paragraphs and subparagraphs numbered consecutively within each section for clarity?			
	<b>Remarks:</b>			