



STATE OF NORTH CAROLINA  
DEPARTMENT OF TRANSPORTATION

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SECRETARY

December 17, 1997

To: Private Engineering Firms w/ Limited Service Contracts to L&S  
L&S Field Group Leaders  
L&S Area Engineers

From: D. E. Burwell, Jr., PE *D. E. B. A.*  
State Location & Surveys Engineer

Subject: New Procedures for Scoping and Negotiating Work

As part of our internal reorganization, several aspects of the shared project duties between Private Engineering Firms (PEF) and Location & Surveys (L&S) will be reassigned from the L&S PEF Group (Dale Burton's group) to the field offices as of January 1, 1998. This memo will discuss those reassigned aspects.

The L&S field offices personnel are to prepare comprehensive scoping notes on each project under their charge (both in-house and PEF). These notes are to describe the necessary activities involved in the project, expected schedule and man-days required. This is to be sent to the Raleigh Central Office.

On projects requiring PEF involvement, the PEF representative is to keep accurate notes of any scoping meetings. These notes should reflect any project activities and distances discussed, dates (interim and final) discussed, and any other issues of concern. The previously mentioned scoping notes can be used as part of these minutes. The PEF will forward a copy of these minutes to the L&S Group Leader in charge of the project along with the PEF's initial man-hour estimate (without fees). L&S field office personnel will prepare a man-hour estimate for the project as well. The Group Leader will review both estimates and approve the PEF estimate to begin negotiation procedures with the PEF.

Upon agreement between the PEF and the L&S Group Leader of a man-hour estimate, the PEF should forward a final copy with fees to Dale Burton in the L&S PEF Group. The L&S Group Leader will forward to the L&S PEF Section the following items: 1) the L&S versions of the original and final estimates, without fees, and 2) a copy of the PEF minutes (initialed as approved by the L&S Group Leader). Spreadsheets have been set up so that all of this information can be transmitted electronically.



Upon completion of a new server system and file structure at NCDOT, the PEF will begin transmitting data to a PEF directory accessible by the L&S field offices. AT that time, the L&S field offices will receive PEF files directly. Until then, data transmittal will continue to go through the L&S PEF Group as it has in the past.

The procedural changes relating to scoping and keeping scoping minutes apply to all PEF work. Negotiations for work performed under S.U.E. or Vanguard contracts will continue to be handled by the PEF group in Raleigh. Because of specific liability concerns, S.U.E. data will continue to be transmitted to the L&S PEF Group prior to transmittal to the field offices.

Thank you for your time and cooperation in this time of transition. If you (L&S staff) have questions or concerns, please do not hesitate to contact this office or your Area Engineer. If you (PEF) have questions or concerns, please do not hesitate to contact Dale Burton at 919-250-4112 or me at 919-250-4109.

DEB:cwb