**Date:**

**Scope and Cost Validation Report**

Construction Program Management Division, WASO

*National Park Service*



**Text shown in red contain instructions for completion of the Scope and Cost Validation Report and should be deleted prior to submission.**

|  |  |  |  |
| --- | --- | --- | --- |
| Park Alpha/PMIS # | If project contains multiple park Alpha’s or PMIS numbers contact WASO Const. Prog Mgmt Div. | | |
| Previous PMIS(s) |  | | |
| Park Name |  | | |
| Project Title | **Project title must match PMIS title** | | |
| Region |  | Lead Office | **Enter one: DSC, Park or Region** |
| Funding Source | **Enter the appropriate funding source that is paying for the design and construction.** | Expected Award |  |

**Status Summary (In the table below enter if the scope, cost or schedule has changed.)**

|  |  |  |
| --- | --- | --- |
|  | **Change (Increase, No Change, Decrease)** | **Magnitude of Change**  **Percent (0%, 0-5%, 5-10%, 10%+) Actual Difference in $’s**  **Schedule (On Schedule, 0-12, 12-24, 24+Mths)** |
| Scope | **No Change** | **0%** |
| Cost | **Decreased** | **0** |
| Schedule | **No Change** | **On schedule** |

**PMIS Project Description & Justification Cut and paste from PMIS, edit length of entry as needed.**

**Description**

**Justification**

**Financial Summary (Completion of the Financial Summary section is done by DSC, Park or Region.)**

**PMIS Statement**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Item** | **NPS** | **Other Government** | **Partner** | **Total** |
| Compliance PWE 524/525 |  |  |  |  |
| Pre-Design (Predesign & Schematic Design) PWE 518 |  |  |  |  |
| Supplemental Services PWE 518 |  |  |  |  |
| Design (Design Development & Construction Documents) PWE 472 |  |  |  |  |
| Construction (Net) |  |  |  |  |
| Construction Management PWE 473 |  |  |  |  |
| Construction Contingency |  |  |  |  |
| **Total Project Cost (as shown in PMIS)** | | | |  |
| **Total Funding Available (Note on partnership projects, project costs and available funding may not match)** | | | |  |
|  | | | | |
|  | | | | |
| **Scope and Cost Validation Proposal** | | | | |
| **Item** | **NPS** | **Other Government** | **Partner** | **Total** |
| Compliance PWE 524/525 |  |  |  |  |
| Pre-Design (Predesign & Schematic Design) PWE 518 |  |  |  |  |
| Supplemental Services PWE 518 |  |  |  |  |
| Design (Design Development & Construction Documents) PWE 472 |  |  |  |  |
| Construction (Net) |  |  |  |  |
| Construction Management PWE 473 |  |  |  |  |
| Construction Contingency |  |  |  |  |
| **Total Proposed Project Cost** | | | |  |
| **Total Funding Available (Note Total Proposed Project Cost and Funding Available may not be equal)** | | | |  |

**Scope Questions (A/E and Project Team completes this section.)**

**Questions and Issues to be answered:**

1. Compare the original PMIS description and justification to current conditions; does the need for this project still exist? *Note: if conditions have changed and the answer is no, provide a description of the changes that have occurred and their impact on the project. For example; has the park already corrected the problem or; has the park changed practices or functional use of the asset so it is no longer needed.*
2. Compare the original PMIS description of proposed work to what currently needed today; is the description still accurate? *For example: has the asset deteriorated since the PMIS statement was written and additional work is needed, or have codes or standards changed that impact the PMIS proposed work.*
3. Compare the original PMIS evaluation to what has been discovered during the initial site visit, did the original PMIS investigation identify all needed work?  *For example, does the PMIS statement recommend replacing roofing shingles, but the decking and trusses also need to be replaced.*

**Estimate (Park to provide data for Table 1)**

Provide an updated cost estimate using the following table. Table 1 and 2 are based on Uniformat Level 2. Note; if the original PMIS cost is incomplete or not in Uniformat, use simplified Table 3 shown below.

Fill in all Project FMSS Locations, FMSS information is available at the Park (Delete examples in Red)

|  |  |
| --- | --- |
| **TABLE 1 - FMSS PROJECT LOCATIONS** | |
| **FMSS Location #** | **Description** |
| 78889 | Lake Visitor Center |
| 79563 | Lake Maintenance Building |
| 79584 | Lake Comfort Station |
| 78808 | Lake Area Water System |
| 78870 | Lake Waste Water System |
| 78825 | Lake Visitor Center Parking Lot |
| 78892 | Lake Access Road |
|  |  |
|  |  |

For each Uniformat section break out cost by asset location, as appropriate, see example for A10 Foundations. Be sure to delete the red examples and directions before completing the Estimate section. When the PMIS statement has a lump sum estimate for the basis of the class C estimate, use Table 3 instead of Table 2 to enter the PMIS estimate information, or use Table 2 and prorate the lump sum estimate across the Uniformat work items. Note the Scope and Validation Class C estimate shown in Table 2 must be completed in all submissions. The Scope and Cost Validation Class C cost estimate should be based on the mid-point of construction.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **TABLE 2** | | | | | |
| **Uniformat II Level 2** | **PMIS Information**  **Class C**  Year: XXXX | | **Scope & Cost Validation**  **Class C**  **Year**: XXXX | | **Rationale for Change** |
| **Quantity** | **Costs** | **Quantity** | **Costs** |
| A10 Foundations  78889  79563  79584 | 300LF  200LF  75LF | $20,000  $10,000  $1,500 | 600LF  0  75LF | $60,000  0  $1,900 | Poor quantity and estimate in PMIS  Work deleted from Scope  Estimating refinement |
| A20 Basement Construction |  |  |  |  |  |
| B10 Superstructure |  |  |  |  |  |
| B20 Exterior enclosure |  |  |  |  |  |
| B30 Roofing |  |  |  |  |  |
| C10 Interior Construction |  |  |  |  |  |
| C20 Stairs |  |  |  |  |  |
| C30 Interior Finishes |  |  |  |  |  |
| D10 Conveying |  |  |  |  |  |
| D20 Plumbing |  |  |  |  |  |
| D30 HVAC |  |  |  |  |  |
| D40 Fire Protection Systems |  |  |  |  |  |
| D50 Electrical |  |  |  |  |  |
| E10 Equipment |  |  |  |  |  |
| E20 Furnishings |  |  |  |  |  |
| F10 Special Construction |  |  |  |  |  |
| F20 Selective Building Demolition |  |  |  |  |  |
| G10 Site Preparations |  |  |  |  |  |
| G20 Site Improvements |  |  |  |  |  |
| G30 Site Mechanical Utilities |  |  |  |  |  |
| G40 Site Electrical Utilities |  |  |  |  |  |
| G90 Other Site Construction |  |  |  |  |  |
| **Subtotal Direct Costs**  **Show and subtotal cost and break down by asset. Mark-ups and Add-ons included** |  |  |  |  |  |
|  |  |  |  |  |  |
| **Mark-ups and Add-ons** | **%** |  | **%** |  |  |
| Published Location Factor: |  |  |  |  |  |
| Project Remoteness Factor |  |  |  |  |  |
| Federal Wage Rate Factor: |  |  |  |  |  |
| Design Contingency: |  |  |  |  |  |
| Standard General Conditions: |  |  |  |  |  |
| Government General Conditions: |  |  |  |  |  |
| Historic Preservation Factor: |  |  |  |  |  |
| Overhead: |  |  |  |  |  |
| Profit: |  |  |  |  |  |
| Contracting Method Adjustment: |  |  |  |  |  |
| Escalation |  |  |  |  |  |
| **Subtotal Mark-ups and Add-ons** |  |  |  |  |  |
| **TOTAL (Net Construction) Show the project total and break down by asset.** |  |  |  |  |  |

Table 3 provided a summary cost comparison between PMIS and the Scope and Cost Validation proposal by Asset # and is required for future tracking of asset investments, filling in all fields is mandatory.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **TABLE 3** | | | | | |
| **Asset # or Major Project Component** | **PMIS Information**  **Class C**  **Year:** XXXX | | **Scope & Cost Validation**  **Class C**  **Year**: XXXX | | **Rationale for Change** |
| **Quantity** | **Cost** | **Quantity** | **Cost** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

1. If the cost estimate has changed by 10% or greater within a Uniformat Level or overall provide a brief description of the changes.
2. If the Scope and Cost Validation cost estimate is higher than the original PMIS estimate describe the increased benefits to the project that would be provided if the Scope and Validation cost are approved.
3. If the Scope and Cost Validation cost estimate is higher than the original PMIS estimate describe what elements could be reduced to bring the project costs back to the original PMIS estimate and describe any impacts this would have on the project.
4. Are there any additional phases/components related to this project? If so describe. Note: sometimes associated work is in a different PMIS statement and has a different number, check with the park.

**Asset Management (This section of the form should be filled in by the park or region. Reguires access to FMSS and OFS programs)**

|  |  |  |
| --- | --- | --- |
| Project-Average API: provided by park | Project-Average FCI-Before: provided by park | Project-Average FCI-After: provided by park |

Is an OFS cost increase proposed to fund operational and programmatic increase? **NO**

If yes, what is Regional priority of OFS request?

**Sustainability and LEED (A&E completes this section)**

LEED Rating (Projected): Place cursor over LEED rating to activate drop down menu **Gold**

Sustainability Checklist percent meeting Federal Requirements:

Building Energy Use Targets:

Energy Use Intensity (EUI): EUI is expressed in KBTU/SF/Year. Calculations should not deduct for the amount of renewable energy provided to the asset.

Percentage better than ASHRAE 90.1:

**Value-based Decision-making Summary (filled out by A/E and Project Team.)**

**Inventory of Key Value-based Decisions and Alternatives:** The PMIS statement describes one solution to the problem, are there other more cost effective solutions than what is shown in the original PMIS statement? If so provide a brief description. For example the PMIS statement indicates all exhibits are included in the building, however many exhibits could be outdoors in a plaza resulting in substantial cost savings. It is necessary to understand the key decisions that have shaped the project program, design, budget and sustainability. For example: What major decisions were made during the GMP e.g. build or don’t build a visitor center? What alternative were considered during Implementation planning or formulation of the PMIS Project Statement; e.g. it was decided to invest $3M in the renovation of an existing VC. What changes have to be made during Scope and Validation to allow scope, cost estimate and schedule to match; e.g. project foundation cost were increased to reflect vary site conditions, alternative roof systems were evaluated to increase insulation values, estimate and scope; e.g. the decision was made to seek LEED Gold rather than Platinum, the original estimate was bad and was corrected.

**NOTE: ADAB Submission Type “Value-based Decision Inventory” (VBDI) can be used to create matrix below, which can be cut and pasted into this form.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Decision**  **(P) – indicates Preferred)** | **Initial Cost** | **Total Cost of Ownership**  **Present worth Dollars** | **Why Selected** |
| **Planning Decisions (Example):**    **Planning Decisions** e.g. GMP, Long Range Interpretive Plan, Implementation Plan, etc.  Document key planning decisions and alternatives that significantly shaped the scope, budget and schedule of the project. | **Year: xxxx**  **Class of Estimate: C** | **Year: xxxx**  **Class of Estimate: C**  **Study Period: 25yr**  **Discount Rate: 3%** |  |
| * Alt A: Add description: * Alt B: Add description: * Alt C: Add description: | * $ * $ * $ | * $ * $ * $ |  |
| **Formulation Decision (Example):**  **Formulation/PMIS Decisions** e.g. PMIS alternatives evaluated, selected or rejected.  Document key formulation/PMIS decisions and alternatives that significantly shaped the scope, budget and schedule of the project for entry into PMIS. Note this data is required for the CAP on projects over $2M. | **Year:**  **Class of Estimate: C** | **Year:**  **Discount Rate: 3%** | **This is a simple description of the rationale for choice…benefit versus cost tradeoffs (a reference/footnote to the decision documents)** |
| * (P) Alt A: Add description:: * Alt B: Add description:: * Alt C: Add description:: | * $ * $ * $ | * $ * $ * $ |  |
| **Scope and Cost Validation Decision (Example):**  **Scope and Validation Decisions** e.g. typically post-initial site visit - scope change w/alternatives considered, poor cost estimate, changes made to maintain budget.  Document key S&CV decisions and alternatives that significantly shaped the scope, budget and schedule of the project. | **Year: xxxx**  **Class of Estimate: C** | **Year: xxxx**  **Discount Rate: 3%** |  |
| * Alt A: Add description:: * Alt B: Add description:: * Alt C: Add description:: | * $ * $ * $ | * $ * $ * $ |  |

**Major Alternatives Considered and Rejected (not listed above) (A&E completes this section)**

Document major alternatives (not described above) (that would have saved dollars or improved the project) rejected during project deliberations.

|  |  |  |
| --- | --- | --- |
| # | **Alternative**  **Alternative** | **Disposition**  **Disposition of Alternative** |
| 1 | Short description of the alternative/recommendation | Rejected: Why was the alternative rejected? e.g. too high initial cost, impacted endangered species |
| 2 |  |  |

**New Unresolved Issues (A/E and Project Team completes this section.)**

Are there any remaining major issues or missing information that could impact the scope, cost or schedule or other information shown in this Scope and Cost Validation Report? If so describe. For example, geotechnical information is incomplete and could impact the foundation estimates.

Are there any new/unresolved issues, and/or decisions to be made? **NO** (If yes, describe)

|  |  |
| --- | --- |
| **Issue** | **Description** |
|  |  |

**Project Contacts**

Project Manager: Enter Name and Phone

Superintendent: Enter Name and Phone

Regional Office Contact: Enter Name and Phone

**Regional Office Certification**

**I certify that this project has been reviewed and is approved for submission to the Construction Program Management Division, WASO**

(Regional Director/Associate Regional Director) Date: