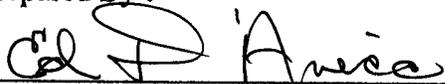
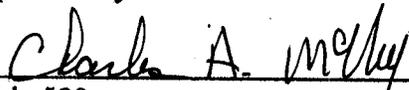


**PWC
DET. PHILA.
CODE 500**

**Standard Operating
Procedure
FOR**

Shop Planning

Desk Guide

Prepared By :  _____	Approved By :  Code 500 _____ Date 11-24-97
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Code 500 SOP # 4

- Purpose:** To circulate the **Standard Operating Procedures** to all planner and estimators; which expresses policy, guidance, and detailed directions required to administer and operate the Planning and Estimating offices at sites #1 & 2.
- Scope:** It is intended that this *SOP* will cover all internal working instructions and procedures used at both sites, and will outline the criteria information and practices needed in the preparation of Planning & Estimating work.
- Policy:** It is the policy of the Planning office to accomplish work that meets all customer requirements in terms of specifications, timeliness and cost. All planners will comply with the requirements contained in this *SOP*. Any deviation must be authorized by the cognizant supervisor prior to issuance.
- Contents:** The following will provide a synopsis of the work flow process; how to develop estimates, the use of computer programs for estimating, tracking and updating work requests, and to purchase materials. It outlines the correct procedures used to issue all work assignments to the shops, including safety requirements and use of the planners' check-off sheets.

Work Flow

1. The customer service department (c/110) will provide a funding document (TF-1) to the planning supervisor's at site 1 and site 2 for execution of a detailed estimate or cost proposal.
2. Planning supervisor then inputs request into the *Estimator* program and passes to lead P&E and assist(s).
3. Work request numbers for specific jobs, are found in the *Worqs* program, along with a partial description of job requirements. Also listed is the cognizant customer representative, and the customer point of contact.
4. Planner(s) will visit work site to inspect conditions, list any special equipment/tools required, note all deficiencies, and meet with the customer, if necessary, to best determine scope of the job. Planners shall use their *Check Off Sheets* at this time to ensure that the customer is aware of what it is he wants, as well as offering him/her any further consideration that they may need.
5. *Estimate Development* will be accomplished using the *Estimator* program which is based on engineered performance standards (EPS).
Where no historical data is available in the program, the planner will enter his estimate based on Means, Richardson, or other detailed, cost data documentation and/or engineered drawings.
6. Planners are to ensure that all customers' requirements are met while formulating an estimate, as well as addressing all *Safety Requirements* and any hazmat issues. During this time frame a walk through with the first line supervisor or project manager will help to determine the elements required by the shops to assure a quality work package.
7. Material requirements are to be addressed in the *Estimator* program. This will provide the customer with a material cost estimate as well as a material list.
CMARS is the procurement vehicle used while issuing the detailed job plan.
8. The estimate is to be submitted as a complete job package. Upon the completion of lead and assist(s) portions in *Estimator*, three copies are to be turned in to planning supervisor. After the planning supervisor reviews and signs off, it is reviewed by the site manager for his sign off. Two copies will then be passed on to the customer by way of the c/110 customer representative for acceptance, and customer sign off.

9. Planners are to update all information in the *Worqs* program. Be sure to use the function (F4) key to annotate the job status for use by the production controllers.
10. Upon acceptance by the customer, *Worqs* will be amended by the customer rep and passed to the production controller for execution. The lead planner will affix execution job order number to *Estimator* program, notify all assist planners to purchase materials, and shall provide six (6) copies of job package to the supervisor for issuance to the shops.

Estimate Development

1. Estimate preparation begins with the assembling of all available information concerning the job/project requiring pricing. Information can range from detailed specifications to mere verbal instructions passed on by the customer service rep.
2. The quality of the estimate will be determined by the amount of data and technical support the P&E receives from the customer rep (c/110), engineering services, and the customers themselves.
Planners' *check-off sheets* should be utilized during this time frame.
3. Once all reference materials are assembled, and input from assists, craftsmen, contractors, vendors, etc. is compiled, the P&E can feel sure that the level of the estimate is to the maximum extent possible.
4. Since there is no substitute for experience, the planners' thorough understanding of the customer requirements, and his ability to recognize all elements required for its completion will result in a manageable project for the shops to accomplish.
5. All information is inputted to the *Estimator* program. If a particular task is not listed in the master job file, the planner shall enter his estimate based on all the above information, and the use of a any estimating cost data book.

Estimator Program

1. *Estimator*, by direction, is the primary planning tool used to establish costs for all Code 500 projects.
2. Supervisor will enter all pertinent information concerning the work request , along with lead and assist(s) planners.
3. Each planner will build his estimate by use of Master job files, or other sources for non-eps labor costs, and will input all charges for rentals, dumpsters, etc. in the miscellaneous block.
4. Planners should make use of the update option provided for the ELM (equipment/labor/material) files. This updates new as well as existing Master jobs.
5. Planners will use the outside purchase file to list their material requirements. A print out listing of this material is provided on the Review Material screen. This list is to be included in the job package.
6. Once assist planner(s) complete their portion, the lead planner must resequence all work into the proper order for entire project execution. Print out copies and give to supervisor for forwarding.
7. The *Estimator* program automatically establishes a 10% contingency cost and must be amended to reflect our vehicle costs.
8. There is a planner at each site designated as the *Estimator* expert. If you are unsure, ask!

Check-off Sheets

1. A complete set of Planners' *check-off sheets*, for each discipline, will be available from the planning supervisor.
2. These sheets are to be used to present a more consistent product to our customers, and close the gap as to what the customer automatically expects to be included in the estimate.
3. It is very important that we be on the same page with our customers as to their expectations and requirements. The sheets will help us review each item, and act as a reminder when developing our estimates.

Safety Requirements

1. Since all occupational injuries and illness can be prevented, it is the responsibility of the planning department to start the process by the review and listing of all occupational safety and health rules and regulations on each job package.
2. All planners must list the applicable Standard Operating Procedure (SOP) on jobs, and where possible spell out any unusual circumstances where special safety precautions are required.
3. Any hazmat questions can be addressed to code 900 personnel.
4. When buying any material containing hazardous substances, planners shall direct all vendors to provide MSDS, material safety data sheets showing product information, exposure situations, hazard prevention, and protection procedures.
5. MSDS sheets will be annotated on jobs issued to shops, circulated to all cognizant personnel, and a copy kept on file in planning office for review as required.

WORQS

1. *Worqs* is the primary program used for work flow evolution, and to track the life cycle of a Customer request number.
2. The planner is responsible for playing the pass from the production controller, or CSR, and for inputting all pertinent labor and material costs after completing the job in Estimator
3. In addition to labor/material costs, the planner shall input the predetermined and contractual costs, as well as updating the job status by use of the (F4) function key.
4. Once all planners' information is inputted, pass the action to the production controller.
Worqs status: Awaiting customer approval.
5. When planner is notified of customer acceptance, and the execution job order number is established, material ordering via CMARS should begin immediately.
The lead planner must always notify assist(s) of all actions regarding the project.
6. Planner should monitor *Worqs* program on a daily basis for all projects until after material is ordered and job is placed in the "Awaiting material" status.
7. The designated point of contact for all problems/concerns regarding the *Worqs* program is Mr. Paul Rothrock @ ext. 3297.

CMARS

1. The Computerized Material Automated Request System, CMARS is the only vehicle used by the planning department to procure materials required in support of all types of work requests.
2. *CMARS* automatically verifies entries for accuracy and completeness. The ease of use, and its immediate processing and material status makes it beneficial to the planners' while satisfying their material requirements.
3. When planner is making a credit card buy he must annotate this information in the name/nomenclature field. Planners' will also tech screen all their own credit card buys using the Defense Logistics Agency customer handbook for Federal Stock class of material.
4. Other fields on the *CMARS* screen that require input are:
 - JON - Job Order Number is validated against information from PWCMIS.
 - TYPE - DTO - Direct Turn Over of material @ bldg.567 within 48 hrs. of receipt.
 - PRIORITY - Picklist available for this item.
 - CATEGORY - Service or material buy.
 - DATE REQUIRED - Enter as a Julian date.
 - DESCRIPTION - Planner is to input sufficient details to specify item even if its a credit card buy.
 - U.I. - Picklist available for unit issue.
 - QUANTITY - Entry is to be a numeric value.
 - PRICE - Must match unit cost shown on material receipt from vendor.
 - S/STORE- DELIVERY POINT - Both entries are required, enter the letter "P".
5. All other fields are not required entries. However, planners are to enter enough information on *CMARS* so that others can verify status of entry, or perform a Technical Review of the screen, if needed.
6. A users guide for the *CMARS* program is available in each of the Planning Supervisors office, and contains all information necessary to access system, and to enter a material request form.

CREDIT CARDS

1. Code 500 planners have been delegated as Purchase Card Holders, and authorized to make credit card buys up to a transaction unit of \$2,500.00 per single buy, or \$25,000.00 for a billing cycle.
2. Planners shall adhere to all procedures and policies that govern the proper use of a purchase card as outlined in the NAVSUP Instructions provided to each planner.
3. Performance of duties as a credit card user will be periodically reviewed by the Procurement Management Review Board.
4. The Planning Supervisors are the approval officials for all buys. Planners will tech screen all their own credit card buys.
5. Monthly bill reconciliation, including verifying the accuracy of each transaction is to be performed in a turnaround time not to exceed 48 hours.

SUMMARY

The P&E's major responsibility is to make decisions that serve the best interests and safety of Code 500 personnel, while making the most judicious use of the customers' funds. During the life of his project he is to serve as the technical project manager, and will maintain liaison with the production project manager, as well as production shops to clarify/augment instructions, prevent delays, and authorize use of substitute methods and materials. The planners' duties are advisory and supervisory in that where unexpected conditions arise, or where changes are needed to original instructions, he will make sure the most economical and expeditious course of action is taken.