PROCUREMENT AND PROJECT MANAGEMENT FOR YOUR TRAIL PROJECT

Jason Meyer- El Paso County
David Deitemeyer- City of Colorado Springs
Greg Mazu- Singletrack Trails
APPROACHES TO PROCUREMENT

Define your scope of work

- Agency expectations
- Project budget
- Workload / capacity
- Defined trail alignment
- Regulatory approvals / permitting
- Project metrics / invoicing

What does your agency use?

- Invitation for Bid (IFB)
- Request for Proposal (RFP)
- General trail alignment
- Utility coordination, USACE permit
- Limited agency CM oversight
- Well defined trail alignment
- Minimal permitting or significant design tasks

What does your agency use?
IFB OR RFP?
EXAMPLE BID TABS

RFP NO.: 13-044
DATE: July 10, 2013

UTE PASS REGIONAL TRAIL CONSTRUCTION

NOTICE TO BIDERS: You are required to use this form when submitting a cost proposal.

RESPONSE CHECKLIST ATTACHED?
Yes _______  No _______

Section A: Retrofit 0.22 miles of utility maintenance road for sheeted trail and vehicle use:
Cost: (Fixed Lump Sum) $_______
Estimated Completion Time: Calendar Days

Section B: Construct 1.15 miles of new 8- ft wide multi-use trail:
Cost: (Fixed Lump Sum) $_______
Estimated Completion Time: Calendar Days

Section C: Retrofit 1.88 miles of utility maintenance road for sheeted trail and vehicle use:
Cost: (Fixed Lump Sum) $_______
Estimated Completion Time: Calendar Days

ESTIMATED TOTAL PROJECT COST:

TOTAL ESTIMATED COMPLETION TIME: Calendar Days

Culvert (Size & Type #) Unit Cost:
- _______ EA
- _______ LF
- _______ CY

The respondent acknowledges and agrees that the above stated costs, fees, and schedule (as may be subsequently modified by negotiation) shall become conditions of the Contract.

Submitted By: Company

Federal ID # / EIN:

Address:

City/State/Zip:

Authorized Representative: _______

Authorized Signature: (Printed)

BID TAB SHEET

IFS: 17-011
DATE: July 10, 2013

UTE PASS REGIONAL TRAIL CONSTRUCTION

NOTE TO CONTRACTORS: You are required to use this form when submitting a bid.

QUOTE AS DELIVERED:

QUOTE AS DELIVERED:

Will you accept payment by Visa credit card? YES  NO
If you accept EFT, is there a fee? YES  NO
If cost or material amount, explain:

Unit Description

Item Description

Quantity

Unit Price

TOTAL PROJECT PRICE

Number of Calendar Days to Completion after Notice of Award:

NOTE: Price must be inclusive of (but not limited to) the following: all contractor fees, actual costs, overhead, profit, permit, and bid, performance and payments bond costs.

Our advertised bid consists of a total price, all inclusive of any negligent, labor, insurance, materials, and any other measures. In no event shall this bid be allowed to. The Contractor agrees to perform the services, except taxes as county is tax exempt.

Submitted By: _______

Federal ID / EIN:

Address:

City/State/Zip:

Authorized Representative:

Authorized Signature:

Printed Authorized Signature:

Department:

EIN:

Address:

City/State/Zip:

Authorized Representative:

Authorized Signature:

Printed Authorized Signature:
Appropriate level of detail
• How detailed do you need to be?
• Trail notes or construction docs?
• Level of oversight
• What are your project metrics
• How are you invoicing?
• Can you use existing standards?
**PROJECT MANAGEMENT**

**Communication**
- What is your PM structure?
- What helps a contractor on the front-end of a project?

**Progress Meetings**
- How often should you meet?
- What is the format?
- Who takes meeting notes?

What's your workload?
Fishers Canyon Pedestrian Bridge Safe Crossing
CONTRACT# 15-036

KICK-OFF MEETING
July 24, 2015
9 am - 10 am
Park Administration Building; 2002 Creek Crossing
Creekside Room

AGENDA

1. Introductions
2. Team Member Roles and Responsibilities
3. Communication and Decision-Making Protocol
4. Contract Matters
   a. Invoicing and Payment
   b. Other
5. CDBG / Davis Bacon Parameters and Procedures
6. Work Plan and Schedule
7. Budget
8. Scope Issues and Questions
9. Next Steps, Action Items, Next Meeting Dates

Do you ask for a photo log?
IN THE FIELD

**Change Orders**
- What is your procedure?
- Issue with plans or specs?
- Request reasonable, or scope creep?

**Punch List**
- When should you develop this list?
- What is your warranty?
- How can you expedite close-out?

*Document everything in writing— even if it’s a simple email*
## EXAMPLE MEETING NOTES / PUNCH LIST

### PUNCH LIST

<table>
<thead>
<tr>
<th>Problem / Action</th>
<th>Location</th>
<th>Summary of Action Needed / Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>NW Parking Lot</td>
<td>Valve box erosion</td>
</tr>
<tr>
<td>2</td>
<td>SW Parking Lot</td>
<td>Irrigation head leak</td>
</tr>
<tr>
<td>3</td>
<td>W Parking Lot</td>
<td>Irrigation head is above grade and angled</td>
</tr>
<tr>
<td>4</td>
<td>W Parking Lot</td>
<td>Two (2) Pines need to be removed</td>
</tr>
<tr>
<td>5</td>
<td>W Parking Lot</td>
<td>Two (2) Ash trees with dead leaders, within plant warranty</td>
</tr>
<tr>
<td>6</td>
<td>General Site</td>
<td>Bury / stake irrigation piping and cover with added mulch</td>
</tr>
<tr>
<td>7</td>
<td>NW Parking Lot</td>
<td>Irrigation head located by light pole is above grade</td>
</tr>
<tr>
<td>8</td>
<td>W Central Parking Lot</td>
<td>Rock island has rock and there is exposed fabric</td>
</tr>
<tr>
<td>9</td>
<td>General Site</td>
<td>Some plants are missing from the landscape islands</td>
</tr>
<tr>
<td>10</td>
<td>SW Parking Lot</td>
<td>Sunken trench with missing grasses</td>
</tr>
<tr>
<td>11</td>
<td>SE Parking Lot</td>
<td>Missing ornamental grasses, located next to light pole</td>
</tr>
<tr>
<td>12</td>
<td>NE Parking Lot</td>
<td>Metal edging is not trimmed / excess</td>
</tr>
<tr>
<td>13</td>
<td>NE Road</td>
<td>Two irrigation heads are above grade</td>
</tr>
<tr>
<td>14</td>
<td>NE Road</td>
<td>Add dirt to back of curb</td>
</tr>
<tr>
<td>15</td>
<td>NE Road</td>
<td>Replace irrigation head at back of curb</td>
</tr>
<tr>
<td>16</td>
<td>SE Road</td>
<td>Dead / missing plants located in the landscape bed by stop sign</td>
</tr>
</tbody>
</table>

### NOTES:
- drip irrigation should be placed upslope to plants to allow for adequate watering. e.g., SE parking bed by stop sign.
- Per installation notes, landscape fabric is required under rock beds only. No mulch beds to have fabric installed.
Ute Pass Regional Trail Construction - RFP
HEAD SCRATCHERS
Resources

• United States Forest Service
  • Standard Trail Plans and Specifications [Link]
• International Mountain Bicycling Association
  • Guide to BuildingSweet Singletrack [Link]
• American Trails. Org [Link]