

Bundling

A Consultant's Perspective

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Not able to provide all the answers, but hopefully will provide insight and knowledge to make the process easier.

Disclaimer: Based on experience of an ever evolving “bundling” process; and it could change tomorrow.

Agenda

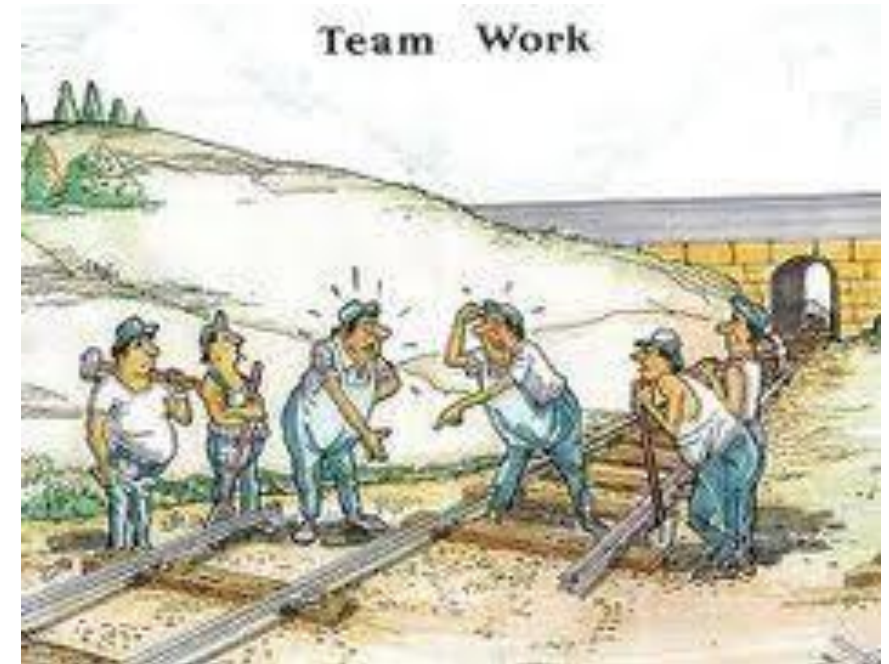
- Parsons Involvement
- Bundle Details
- Lessons Learned

Parsons Bundled projects

- Districts with Bundled Contracts
- Types of Projects in Bundling Contracts

Parsons Bundling Experience

- Districts we have partnered with to bundle
 - Crawfordsville
 - Greenfield
 - LaPorte
 - Seymour
 - Vincennes
- Example Types of Projects Designed and Bundled
 - Bridge overlays (thin deck & rigid)
 - Bridge Rehabs
 - Pavement Preservation Projects
 - New/Replacement Bridges
 - Culvert Liners
 - Intersection Modifications
- Experience with 2 – 14 projects within a bundle
- Experience as bundling lead and design within a bundle



Bundle Details

- Goals of Bundles
- Understanding Bundles
- Coordination with INDOT PM and Designers
- Bundling Files

Primary Goals of Bundles

- Construction
 - Potential to increase number of bidders
 - Reduce Costs
 - Potential to Reduce Construction time
 - Potential for less disruption to travel public
 - Consistency in work
 - Potential for less disruption to travel public
- Design
 - Potential to Reduce Design Costs
 - Potential to Accelerate Design Schedules
 - Consistency in work



Secondary Goals of Bundles

- Ease of Design
 - Designing similar project types
 - Possibly utilizing same MOT scheme
 - Combining field visits
- Ease of Coordination
 - Utility Coordination
 - Coordination with INDOT PM
- File Management
 - Potential for fewer files than traditional projects



Understanding Bundles

- Who is involved
 - INDOT PM (obvious)
 - Designer(s) – Consultant or INDOT (obvious)
 - Contracts (maybe not so obvious)
 - Construction (maybe not so obvious)
- Remember, once all the files are uploaded, contracts has to handle all of them. Whether there are 10 or 100 files.
- If construction would like to review some of the documents, they have to sort through them.
- Goal – Balancing the number of files that make it easy for people to combine but not too difficult to be able to find what people could be looking for.

Coordination with INDOT PM and other Designers

- Bundling Lead vs Designer in a Bundle
 - Discuss during scope and fee development
- Bundling Leads
 - What will INDOT PM bundle and what will Designer Bundle
 - How is coordination being handled?
 - Quarterly Meetings (LaPorte District)
 - When to begin Bundling
 - Early in design – knowing all projects/designers included
 - Before Stage 3 – Provisions & Menus and Estimate
 - After Stage 3 – Contract Prep. Doc. (sometimes EnvConFrm)
 - FT – All other files. Bundling takes time, so plan ahead



Bundling Files

- Every District Bundles a little differently
 - Early coordination with the INDOT PM
 - Ask if District has Bundle Checklist
- Other factors for Consideration
 - How many projects are in the bundle?
 - What does it make sense to bundle?
 - “Use Common Sense”



“Now! *That* should clear up a few things around here!”

Bundling Files

- Objective
 - Reduce the effort required to generate the contract documents
 - Too many files can be cumbersome to combine
 - Too few files can be cumbersome to sort through

- One Document vs. Bundled Files
 - One Document
 - Provisions
 - Provision Menu
 - Contract Preparation Document
 - Right-of-Way/Railroad Certifications
 - Bundled Files
 - All Project Commitments
 - Permits
 - Load Rating Memos
 - Environmental Consultation Forms

BUNDLING COORDINATION

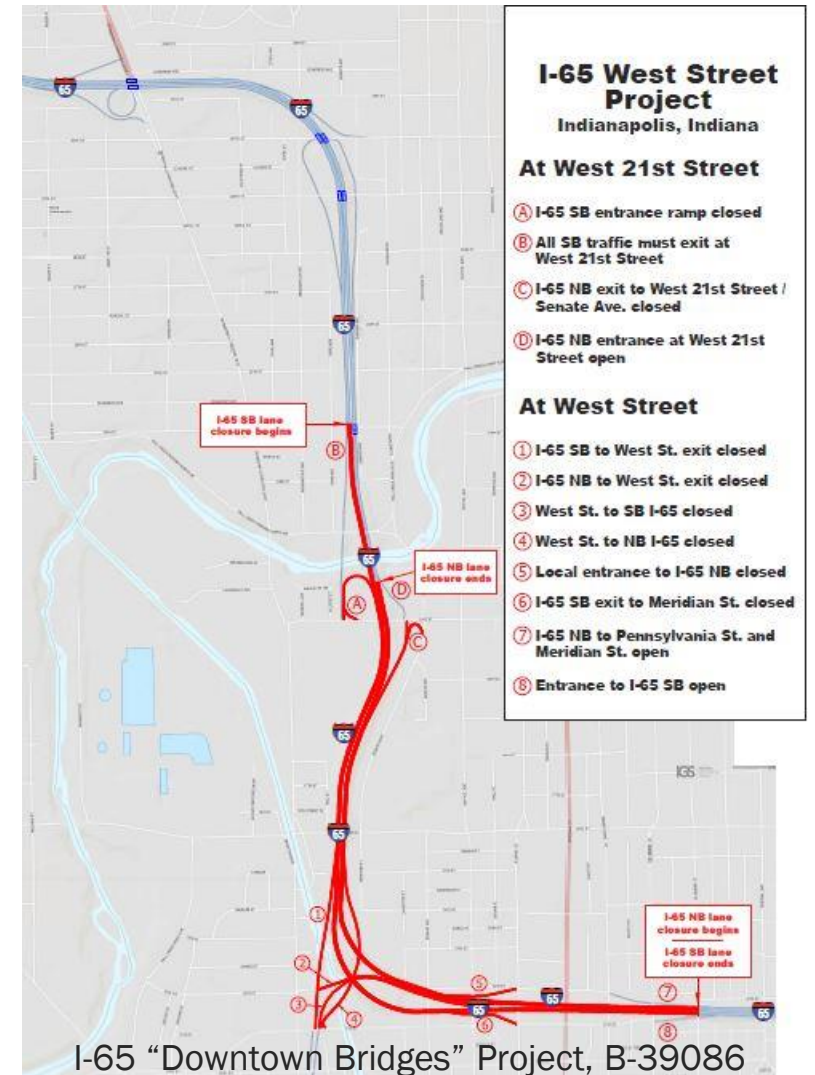
Submittal Document	Format	Submit By	Comments
All Project Commitments	.pdf	Lead DES	all DES printed & combined into 1 file
Asbestos Report	.pdf	Individual DES	per DES
Asbestos Cert	.pdf	Individual DES	per DES
Bridge Load Rating Memo	.pdf	Individual DES	per DES
Bridge Search Data Form	.xls	Lead DES	all DES listed on one form
Contract Prep Doc	.doc	Lead DES	all DES listed on one form
Correspondence File	.pdf	Individual DES	per DES
Cost Estimate pdf	.pdf	Individual DES	per DES
Cost Estimate (CES)	CES	Individual DES	per DES
Design Comps	.pdf	Individual DES	per DES
Enviro Consult Form	.pdf	Individual DES	per DES
Geotech Report	.pdf	Individual DES	per DES
Geotech Review of FCP	.pdf	Individual DES	per DES
Geotech Waiver	.pdf	Individual DES	per DES
Level One Checklist	.pdf	Individual DES	per DES
Markups from prev review	.pdf	Individual DES	per DES
Pavement Design	.pdf	Individual DES	per DES
Permits	.pdf	Lead DES	all DES printed & combined into 1 file
Plans - Existing	.pdf	Individual DES	per DES
Plans	.pdf	Individual DES	per DES
QA Form	.pdf	Individual DES	per DES
Quantity Calcs	.pdf	Individual DES	per DES
RR Cert	.pdf	Lead DES	all DES listed on one form
RR Spec	.pdf	Lead DES	all DES combined into 1 file
Response to comments	.pdf	Individual DES	per DES
RW Cert	.pdf	Lead DES	all DES listed on one form
RSP Menu	.xls	Lead DES	all DES combined into 1 file
USP Menu	.xls	Lead DES	all DES combined into 1 file
RSP's	.doc	Lead DES	all DES combined into 1 file
USP's	.doc	Lead DES	all DES combined into 1 file
Summary of Design Exceptions	.pdf	Individual DES	per DES
Survey Field Book	.pdf	Individual DES	per DES
Traffic Control Plan Checklist	.pdf	Individual DES	per DES
Traffic Management Plan	.pdf	Individual DES	per DES
Transmittal Letter	.pdf	Individual DES	per DES
Utility Cert	.pdf	Lead DES	all DES listed on one form
Utility Relo Plans / Workplans	.pdf	Individual DES	per DES, separate file per utility

Lessons Learned

- Benefits
- Improvements
- The Perfect Procedure for Bundling

Benefits

- Potential to coordinate multiple projects at once
 - Combine field visits
 - Combining project coordination
- Fewer project files
 - Only one Railroad certification
 - Only one set of provisions
- Potential to utilize MOT scheme for projects close by
 - Reduce cost
 - Potential for closure option
- Helps smaller projects “sell”
- Better unit prices
- Potential to build a better quality product



- 35 Day closure
- 5 Bridge Deck Overlays

Areas of Improvement

- Multiple Designers
 - Potential to spend a lot of time coordinating
 - Use of conflict of pay items
- Potential for Lump Sum unit price discrepancies
 - MOT, Mob./Demob., Const. Eng.
- A single project can delay an entire bundle
- Too many projects within a bundle
 - Too many projects (or different types) can result in several Contractor Subs, loss of construction consistency
 - Submitting many projects at once can be taxing on PM and designer
 - More projects means more files to combine and submit



The Perfect Procedure for Bundling

There is no perfect procedure for bundling files

- Sorry, because no two bundles are the exact same

Steps to help bundling

- Coordinate with INDOT PM early
 - Determine who is bundling what files
- “Use Common Sense” or a little bit of judgment
 - How many Projects included in the bundle.
 - Does it make sense to bundle certain files
- Coordinate with all designers early
 - Bundling takes time
- Golden Rule
 - Remember, someone has to handle all the files
 - Remember, someone might need to find a file



Questions?

SORRY

**Yesterday was the
deadline
for all complaints**

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