

From: Dennis Jue <djue@ardurra.com>
To: Jue, Dennis
Sent: 4/24/2022 3:28:03 PM
Subject: FW: CIP Management



Dennis Jue
Project Director

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From: Santos, Ron <rsantos@lakeforestca.gov>
Sent: Wednesday, April 20, 2022 9:30 AM
To: Dennis Jue <djue@ardurra.com>
Subject: RE: CIP Management

Dennis:

Here is a link to the City's Purchasing and Contracting Guidelines:

 <https://lakeforestca.sharepoint.com/sites/Finance/Shared%20Documents/Forms/AllItems.aspx?id=%2Fsites%2FFinance%2FShared%20Documents%2FPurchasing%20and%20Contracting%20Guidance%20and%20Training%2F2019%20Purchasing%20and%20Contracting%20Guidelines%2Fparent%2Fsites%2FFinance%2FShared%20Documents%2FPurchasing%20and%20Contracting%20and%20Training%20Guidance%20and%20Training>

rsantos@lakeforestca.gov

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From: Dennis Jue <djue@ardurra.com>
Sent: Wednesday, April 20, 2022 9:20 AM
To: Mark Lewis <mlewis@ardurra.com>; Dino D'Emilia <ddemilia@ardurra.com>; Santos, Ron <rsantos@lakeforestca.gov>
Cc: Jue, Dennis <DJue@lakeforestca.gov>
Subject: Re: CIP Management

Mark - I talked to Ron Santos regarding the project. He is the planner managing CDBG and the Covid funds. The city uses a consultant to help-out. We decided it would be best to meet with the consultant. He will be able to explain the difference between normal CDBG funds and the Covid funds. Ron will also invite a Finance department employee to go over the city's procurement process (be it more-or-less restrictive than Covid funds). The city already has been allocated the \$350,000 in Covid funds.

Give me some times next week you can meet in person. For your questions below, the funds will

be the Covid funds (\$350,000).


From: Mark Lewis <mlewis@ardurra.com>
Sent: Wednesday, April 20, 2022 9:13 AM
To: Dino D'Emilia <ddemilia@ardurra.com>
Cc: Jue, Dennis <DJue@lakeforestca.gov>; Dennis Jue <djue@ardurra.com>
Subject: RE: CIP Management

Dino:

Here is a draft of a set of questions I plan to send in an email to Tom. Let me know if these work and if there are any others.

What is the source of funds being used for the architect you currently have under contract? Will this be considered part of the scope you are looking for us to oversee?
What is the source of funds contemplated for the PM and fund management work you are requesting from Ardurra?

Thanks,

 Ardurra

Mark Lewis

Project Director, Municipal Services

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From: Dino D'Emilia <ddemilia@ardurra.com>
Sent: Wednesday, April 20, 2022 9:08 AM
To: Mark Lewis <mlewis@ardurra.com>; Dennis Jue <djue@ardurra.com>
Cc: Lisa Penna <lpenna@ardurra.com>
Subject: RE: CIP Management

Great. It would also be helpful to get confirmation of what funds are intended to be used to pay us and the architect(s).



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From: Mark Lewis <mlewis@ardurra.com>
Sent: Wednesday, April 20, 2022 9:07 AM
To: Dino D'Emilia <ddemilia@ardurra.com>; Dennis Jue <djue@ardurra.com>

Cc: Lisa Penna <lpenna@ardurra.com>

Subject: RE: CIP Management

Dennis is working to get a copy of the grant paperwork/guidelines. We can review once we get our hands on that.

 Ardurra

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From: Dino D'Emilia <ddemilia@ardurra.com>

Sent: Wednesday, April 20, 2022 9:06 AM

To: Mark Lewis <mlewis@ardurra.com>; Dennis Jue <djue@ardurra.com>

Cc: Lisa Penna <lpenna@ardurra.com>

Subject: RE: CIP Management

We really need to understand the funding requirements and fiscal constraints before we prepare a proposal, or at least I do... I'm really not interested in submitting anything if Tom's expectations are that we take it through construction for \$10k – it's just not feasible.

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From: Mark Lewis <mlewis@ardurra.com>

Sent: Wednesday, April 20, 2022 9:01 AM


To: Dino D'Emilia <ddemilia@ardurra.com>; Dennis Jue <djue@ardurra.com>

Subject: RE: CIP Management

I don't know if they used the grant money for the architect. They used the \$10,000 contract signing authority for Tom which, as I understand from Tom, complies with the grant guidelines for the source of funds (assuming they used the grant funds which I am not sure).

As for expecting us to do it for \$10,000, that may be Tom's intention. That seems quite light to me for what he is intending for the scope he roughly outlined. Perhaps we submit a letter proposal that is adequate for the scope of work and let the conversation about the amount be had on the back end (assuming we don't submit something that is too outrageous that he will be annoyed out of the gate). That's my sense.

Thoughts?

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From: Dino D'Emilia <ddemilia@ardurra.com>
Sent: Wednesday, April 20, 2022 7:58 AM
To: Mark Lewis <mlewis@ardurra.com>; Dennis Jue <djue@ardurra.com>
Subject: Re: CIP Management

Are they paying the current architect with grant money? if so, how did they procure that contract?

Is Tom still expecting us to take this through construction for \$10k?

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From: Mark Lewis <mlewis@ardurra.com>
Sent: Wednesday, April 20, 2022 7:53:36 AM
To: Dino D'Emilia <ddemilia@ardurra.com>; Dennis Jue <djue@ardurra.com>
Subject: RE: CIP Management

As mentioned below, if the architectural drawings currently underway are sufficient for bidding purposes, then the project will go straight to a competitive bid. If not, then more A & E effort. So, won't know until the current effort is complete. For purposes of putting together a letter proposal, can't we include some provisos that would cover in both circumstances?

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From: Dino D'Emilia <ddemilia@ardurra.com>
Sent: Tuesday, April 19, 2022 7:38 PM
To: Dennis Jue <djue@ardurra.com>; Mark Lewis <mlewis@ardurra.com>
Cc: Lisa Penna <lpenna@ardurra.com>
Subject: RE: CIP Management

We need to understand which contracts the City intends to pay for using the grant funds. If they do not procure these contracts in compliance with grant requirements, the entire grant may be jeopardized.



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From: Dennis Jue <djue@ardurra.com>
Sent: Tuesday, April 19, 2022 1:21 PM
To: Mark Lewis <mlewis@ardurra.com>; Dino D'Emilia <ddemilia@ardurra.com>
Subject: Re: CIP Management

Mark/Dino - Ron will be back in City Hall tomorrow. I'll meet with him then and get whatever documents he has.

From: Mark Lewis <mlewis@ardurra.com>
Sent: Tuesday, April 19, 2022 9:02 AM
To: Dino D'Emilia <ddemilia@ardurra.com>; Dennis Jue <djue@ardurra.com>
Subject: RE: CIP Management


Gents:

I talked with Tom yesterday. He forwarded me the attached emails regarding the project. It appears that delivery isn't due until 9/1/24. He also informed me that he has independently retained the architect that worked on the City Hall project and a similar shade structure to have them prepare architectural drawings. He anticipates that those will be available in about a month or so. From there, he would look to shop that info with contractor(s) to see if there is adequate detail to provide solid bid information. If so, project hits the street. If not, then additional design to ensue.

I inquired about the funding document. In addition to the emails attached, he said that perhaps Dennis you could work with Ron Santos to secure a copy of the funding document so we have a better understanding of the Federal requirements. It does appear that it is CDBG funds but I keep seeing/hearing this Covid CARES relief fund aspect to it all.

What does all this mean? Good question. How do we propose from here based upon the first email from Tom and now this new round of emails?

Dino, I did talk with Tom about how good you and your group are with Federal fund documentation and that I had you do all of ours in FV and would recommend you even if I didn't work for Ardurra (which I absolutely would). In any event, not sure how to get my head around this one.

 Ardurra

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From: Dino D'Emilia <ddemilia@ardurra.com>
Sent: Saturday, April 16, 2022 11:39 AM
To: Dennis Jue <djue@ardurra.com>; Mark Lewis <mlewis@ardurra.com>
Cc: Lisa Penna <lpenna@ardurra.com>
Subject: RE: CIP Management

Thanks Dennis.

Mark, at our PM rate of \$195, there would be about 51 hours available, or fewer PM hours with some support staff hours for tedium...

A rough estimate to implement this would be:

- Procure designer: 6-8 weeks
- Administer Design / permits: 12-16 weeks
- Bid / award / contract execution: 8-12 weeks
- Long Lead procurement (Shade structure deferred submittal, A/E review, plancheck review and approval / fabrication/ delivery): 18-24 weeks
- Construction: 12 weeks
- Total 56 to 72 weeks... averaging well less than an hour of PM per week if we sign on to do this for under \$10k.

Let me know how you guys want to approach this / what assistance you need from me.



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From: Dennis Jue <djue@ardurra.com>
Sent: Thursday, April 14, 2022 11:02 AM
To: Mark Lewis <mlewis@ardurra.com>; Dino D'Emilia <ddemilia@ardurra.com>
Cc: Lisa Penna <lpenna@ardurra.com>
Subject: Re: CIP Management

\$350,000 in CDBG funds.

From: Mark Lewis <mlewis@ardurra.com>
Sent: Thursday, April 14, 2022 10:08 AM
To: Dino D'Emilia <ddemilia@ardurra.com>; Dennis Jue <djue@ardurra.com>
Cc: Lisa Penna <lpenna@ardurra.com>
Subject: RE: CIP Management

Dennis:

I don't recall what the funding amount was for this? Do you? I want to say it was under \$100k but don't recall.

Ardurra

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From: Dino D'Emilia <ddemilia@ardurra.com>
Sent: Thursday, April 14, 2022 10:02 AM
To: Mark Lewis <mlewis@ardurra.com>; Dennis Jue <djue@ardurra.com>
Cc: Lisa Penna <lpenna@ardurra.com>
Subject: RE: CIP Management

Hi Mark. Not sure we can see the project through from cradle to grave for \$10k. We should really confirm feasibility to do so before we spin our wheels. What is the estimated construction value?



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From: Mark Lewis <mlewis@ardurra.com>
Sent: Thursday, April 14, 2022 7:45 AM
To: Dino D'Emilia <ddemilia@ardurra.com>; Dennis Jue <djue@ardurra.com>
Subject: FW: CIP Management

Dino:

This is the scope of work for which Tom is requesting a letter proposal. Sounds like a lot for the requested \$10,000 limit, but you are better at assessing this level of effort than I. As for assisting the City with finding an architect to design, it is hopeful that we can utilize the architect/engineer that designed the other shade structures. If not, we would need to find someone (again you and/or someone in Ardurra probably has a better lead on this). Once secured, Dennis and I can collaborate on PM. We would need assistance on tracking/managing the funds (CDBG as I currently understand it even though the email below indicates Covid funding).

I would appreciate your help putting this together. Dennis, any additional thoughts?

Thank you

Ardurra

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From: Wheeler, Thomas <twheeler@lakeforestca.gov>
Sent: Wednesday, January 26, 2022 4:20 PM
To: Mark Lewis <mlewis@ardurra.com>; Dennis Jue <djue@ardurra.com>
Cc: Erdman, Douglas <derdman@lakeforestca.gov>
Subject: RE: CIP Management

To utilize Federal funds to help me with the Covid Patio Cover Project we need a separate contract with Ardurra procured under federal policies. We will use a micro-purchase with an amount of \$10,000.

Please prepare a separate contract to provide project management support for the Federal Covid Patio Cover Project. If you could provide a not to exceed \$10,000 proposal to provide on-call project management services to assist the city with the design, bidding, and construction of a patio cover utilizing federal Covid funding for the city of lake forest in addition to grant management and other project management services necessary for the use, tracking, and spending of grant funds. Etc etc

From: Erdman, Douglas <derdman@lakeforestca.gov>
Sent: Monday, January 24, 2022 11:21 AM
To: Mark Lewis <mlewis@ardurra.com>; Dennis Jue <djue@ardurra.com>
Cc: Wheeler, Thomas <twheeler@lakeforestca.gov>; Langford, Carole <clangford@lakeforestca.gov>
Subject: RE: CIP Management

Mark/Dennis,

Here are the contacts for the street design projects. The scope you describe below is exactly what we're looking for in helping manage these design projects. When you e-mail the contacts below to set up kickoff meetings, be sure to CC me on the emails. Thanks!

BKF Engineers

Project: Los Alisos/Muirlands Intersection Improvement

Contact: Shelia Amparo (Sr. Project Manager)

Phone: (949) 526-8478

samparo@bkf.com

Onward Engineering

Projects: Lake Forest Drive Resurfacing & Trabuco Road Resurfacing

Contact: Majdi Ataya, Project Manager

Phone (714) 533-3050

mataya@oe-eng.com

Rick Engineering Company

Projects: SB Rancho Widening @ Lake Forest Dr., SB Jeronimo Widening @ Lake Forest Dr., Bake & Toledo Improvements, WB Los Alisos @ Rockfield Widening

Contact: Joe Hammond, Principal Project Engineer

Phone: (949) 588-0707

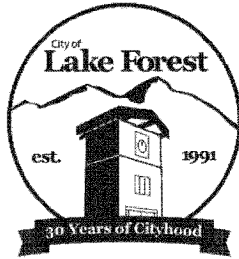
jhammond@rickengineering.com

Tait & Associates

Projects: El Toro Medians (Jeronimo to Trabuco), Arterial Median Improvements,
Bake/Baffin Bay Median, El Toro Resurfacing, Bake Parkway Resurfacing (Rancho South to South Pointe)
Contact: David Sloan, Director of Engineering
Phone (714) 560-8643
dsloan@tait.com

Tait has already started survey for some of their projects and they prepared utility notices that were sent out.

As for the Shade structure project, Tom has more info on that. We're getting a cubical set up for your use with a computer & phone hopefully by the end of this week.



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Assistant City Engineer/
Engineering Services Manager
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Fax (949) 461-3511
derdman@lakeforestca.gov
100 Civic Center Drive
Lake Forest, CA 92630
www.lakeforestca.gov

From: Mark Lewis <mlewis@ardurra.com>
Sent: Thursday, January 20, 2022 8:41 AM
To: Erdman, Douglas <derdman@lakeforestca.gov>; Wheeler, Thomas <twheeler@lakeforestca.gov>
Cc: Dennis Jue <djue@ardurra.com>
Subject: CIP Management

Doug/Tom:

Good to see you both and to meet with you yesterday to discuss the various projects. The following is a summary of my takeaway from our meeting. If anyone has anything more to add to the conversation, by all means chime in.

First order of business is to establish kick off meetings with the four design firms retained for the "12" projects (the "12" – kinda sounds like the motto of the 12th man for the Seattle Seahawks). Doug, if you would provide me with the contact information for each of the four firms I will reach out to set up those meetings. It will be my intent to schedule them for 30-45 mins back to back . . . on the same day. I figure that will work well for flow. Let me know what works best for you in the next couple weeks to basically set aside a morning or afternoon for these meetings.

As for project priority, Bake/Baffin Bay median is first priority to get out on the street. The El Toro package of projects by Tait is to be packaged in such a way as to have that as one bid package but separated in the bid schedules to provide for ease of financial tracking for the various pots of funding. For all projects, it is desirable to get a reasonable rough order of magnitude cost estimate at a 30% or similar design level to see where we are financially and if scope changes need to be accommodated to adequately address funding commitments/timelines.

For each of the four consultants, we will be requesting project schedules with milestone and deliverables timelines. It will be expected that these will reasonably match the delivery table that you shared in our meeting last month (the colorful spreadsheet entitled 12 (+1) Street Projects Delivery Table). There are some near term deliveries for design of medians that are coming up fairly soon.

As for on-going effort, once we get started we (Dennis and I) will be coordinating efforts with the various design teams to keep these projects on track. We will provide you with updates on a regular basis (interval TBD) and will coordinate (email, phone call, meeting) when there are milestone activities and/or pivot points that are critical to the final outcome and would benefit from your input/direction.

As for the shade structure at the Sr. Ctr, we will coordinate with the architect once you have him under contract. In the meantime, Dennis can work internally to search through files for any info that might be helpful to understanding a rough order of magnitude cost for the intended scope. Based upon the conversation yesterday, I believe it is reasonable to expect that some sort of design procurement might be necessary to develop a bid package to be able to retain a contractor for construction. If that is the vision, then we can begin developing an appropriate RFP that will ultimately incorporate the architect's design concept. It would be an excellent turn of events if the architect that is being retained currently can develop the design well enough to be able to assemble a bid package that is biddable and constructable from the design concept. We can work with our CM group to solicit their input once we have a better idea of what the architect's design development will look like. We can track this as it develops and see the direction in which we need to head.

I hope I have at least captured the essence of our discussion yesterday. If there are any more details or direction that I have either missed or you feel are needed at this time, by all means please fire away.

Looking forward to working with you to get these projects delivered.

Mark Lewis

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