

Engineering Contract Review Process

The purpose of this attachment is to coordinate submission of construction documents to the State Office, in a timely manner, to allow for review and approval by the State Engineer. Field offices must allow adequate time for the review process prior to submitting documents to the National Business Center (NBC) or the MSO Procurement Staff.

All planned procurements should have been input to the Department Advance Procurement Plan by this time. In addition, by February 1st, all field offices will send the State Engineer a list of projects that will be reviewed by the MSO Engineering Staff this year. The list shall include estimated contract costs.

The NBC will establish deadlines for FY 2008 purchase requisitions and will issue an Instruction Memorandum.

The Montana State Office engineering and acquisition staffs, and the National Operations Center (NOC), have reviewed the following process, which is an updated description from an earlier IM. The procedures are effective immediately.

1. Proposed contracts under the simplified acquisition threshold (SAT):

The simplified acquisition threshold (SAT) is \$100,000.

The contract solicitation package is to include a completed Ideas Procurement Request and Purchase Request Attachment, specifications, drawings, maps, cost/time completion estimates, bid schedule, liquidated damages form (if necessary), additional bidder's names, if applicable, and any other pertinent information. Refer to Attachment 3 for submission requirements for MT935.

For routine projects, or projects that have had a comprehensive review by the zone engineering staff, review by the MSO engineering staff is not necessary. The contracting officer will work directly with the technical contact listed on the procurement request form, to coordinate timeframes, clarify any discrepancies, and advise of the progress, etc

For the contracts that will be reviewed by the MSO engineering staff, the field office will submit one hard copy of the contract package directly to MSO engineering. After review, MSO engineering will either send a red-line copy, or email comments, to the field office for any needed revisions. After final revisions are checked, MSO engineering will sign the appropriate blocks of the drawings per IM MT2007-068.

Please note that all projects that have the potential to affect health and safety of the visiting public or Bureau staff shall be reviewed by the Montana State Office Engineering Staff, prior to solicitation (reference IM MT2007-018).

For modifications on contracts reviewed by the MSO engineering staff, the contracting officer's representative (COR) will discuss the changes with the MSO engineer who reviewed the contract before asking the contracting officer to issue a modification.

The field office will be responsible for obtaining the necessary permits, easements, funding, and approvals, including approvals required by private landowners, if needed.

As contract packages are submitted, Mary Clark, Procurement Analyst, will review them for use of the 8(a) set-aside program or Service Disabled Veteran Owned Small Business. She will advise the field offices when use of 8(a) contractors is appropriate.

2. Proposed contracts over the small dollar threshold:

See Attachment 2 for requirements for BC-664 submission requirements.

For routine projects, or projects that have had a comprehensive review by the zone engineering staff, review by the MSO engineering staff is not necessary. In this case, send the items above directly to NBC (BC-664).

For the proposed contracts that will be reviewed by the MSO engineering staff, submit one hardcopy of the contract package to the MSO, allowing adequate time for review. After review, engineering will either send a redline copy, or email comments, to the field office for any needed revisions. Once revisions have been completed, MSO engineering will sign the appropriate blocks of the drawings per IM MT2007-068.

Please note that all projects that have the potential to affect health and safety of the visiting public or Bureau staff shall be reviewed by the Montana State Office Engineering Staff, prior to solicitation (reference IM MT2007-018).

The MSO has information on local 8(a) contractors that can be useful to the NBC. The field office will need to notify Mary Clark, when they input project information into IDEAS. They will do this by sending an email message to Mary, with the following items: "R" Number, Title of Project, what cabinet the project data is stored in under IDEAS, and when the hardcopy and CD data is sent.

For modifications on contracts reviewed by the MSO engineering staff, the COR will discuss the changes with the MSO engineer who reviewed the contract before asking the contracting officer to issue a modification.

The NBC will accept additional bidders' names with the contract package, but keep the list to ten names or less.

3. Logs/Diaries:

Submit the inspection records and payrolls to the contracting officer weekly, and send a copy of the inspection records to the MSO engineering staff.

4. Completion report for construction contracts:

Immediately upon the completion of a construction job, a Construction Project Completion Report (Form 1310-11) must be prepared and submitted to NBC, Program Management Branch (BC-612); NBC, Property Operations Branch (BC-653); the MSO, Branch of Engineering (MT-931). In coordination with the field office real property manager, prepare the BLM 1530 RP Forms for capitalized sites of \$100,000 or more. The field office real property manager is responsible for submitting the BLM 1530 RP Forms to the MSO, Branch of Business and Fiscal Services (MT-935). Detailed instructions can be found in Handbook 1530-1.

If you have any questions, please contact Mary Clark, Procurement Analyst, at (406) 896-5205, or Greg Bergum, Supervisory Civil Engineer, at (406) 896-5217.