



Guide to project development

For mountain bike trails and training facilities



sportscotland.org.uk

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the national agency for sport

Putting sport first

sportscotland, Scottish Cycling through its project 'Developing Mountain Biking Scotland' (DMBinS) and the Forestry Commission Scotland (FSC) have developed this guide to help clubs or community groups, who would like to develop a new mountain biking training facility or trail. Following the RIBA 'plan of work' stages of project development, it outlines the key stages and steps required to progress through a facility build project. It also offers links where you can source additional information.

- KEY** Black tick boxes are tasks that we would expect the club/development organisation to complete.
 Coloured boxes we would expect to be completed by a professional trail designer / contractor.

Idea – Strategic Definition

0 1 2 3 4 5 6 7

Checklist of tasks

Support Information

- Create a simple document that outlines your idea

This should include:

What do you want to build? What does it achieve?

Where? Make a list of potential sites

Why? Outline the rationale for the project

Who will use it? Who is your target audience?

When? Think realistically about how long this will take to achieve.

How much?

sportscotland have published a series of design datasheets that provide an introduction to mountain bike facility types. Find these on the sportscotland website www.sportscotland.org.uk/facilities/design_guidance/

- Set up a project delivery group

This may be your existing club committee, a separate sub committee, separate organisation or an entirely new group.

This group may include:

- Interested Individuals
- Representation from interested organisations
- Public sector partners
- Landowners
- Businesses

Ideally these people will bring a range of background and skills to develop ideas / fundraise / develop funding bids / liaise with designers or contractors and broaden the scope of idea.

Idea – Strategic Definition

0 1 2 3 4 5 6 7

Checklist of tasks

Support Information

Formalise the project delivery group

If you want to apply for funding you will need to be a constituted organisation. This may be in the form of a mountain bike club, development trust or a charitable organisation.

DMBinS website has information on [How to start a MTB Club](#).

sportscotland's help for clubs website has tools and resources to help clubs start and develop www.sportscotland.org.uk/clubs/help-for-clubs

[Senscot Legal](#) was established late in 2010 to provide support in legal matters to the social enterprise community and wider third sector in Scotland and may be able to advise on the best structure for your group.

[Development Trust Association Scotland](#) is the national body for development trusts in Scotland who provide useful resources, training and limited support to communities wishing to establish a development trust.

Site considerations

Where is your site going to be?

Is there only one suitable location or are there several options?

Can you do a SWOT (strengths, weaknesses, opportunities & threats) analysis on all of the site options?

How would each site option fit into the regional provision of existing facilities?

Does it duplicate or compliment existing facilities, does it fill gaps in provision, and does it offer additionally?

Do any of the site options offer additional business or tourism potential?

You may be able to answer all these questions straight away, alternatively some of these questions may be explored within your feasibility study.

You should record any analysis to be able to provide evidence that you have considered a variety of options and your site selection is logical and has been carefully selected.

Case Study

Considering sites across a city, Dundee City Council

Evidence the need for the idea

How do you know you need the facility?

Who would use the facility?

How can you evidence and record need e.g. by public meetings, questionnaires or survey?

Does your idea deliver for the local community? Will it meet the needs of target groups? i.e. deprivation, health

Benchmark your idea against other facilities already established elsewhere in Scotland and what they have achieved.

What is the population base? How many people live in the area?

Case Study

Steps to successful community led service provision

Idea – Strategic Definition

0 1 2 3 4 5 6 7

Checklist of tasks

Support Information

- Evidence the support from the local community

Potential people to approach:

Mountain bikers, [Scottish Cycling Regional Development Officers](#), [DMBinS Project Manager](#), Councillors, Local Authorities, businesses, residents/ locals, land owners, schools, [MB/cycling Groups](#)

Example

Mountain bike facility demand survey

- Identify any strategies that the project delivers against

The project may relate to a local or regional strategy for sport or physical activity, in line with the Scottish National Outcomes. Local strategies covering health, tourism, economic, employment or third sector development may also influence your project.

The following documents that may help provide evidence:

[Scottish National Outcomes](#)

[Scottish National MTB strategic framework](#)

[Scottish Cycling facilities strategy](#)

[Mountain bike development cluster action plan](#)

- Speak to the landowners to ensure that they are on board with the idea

It is essential to have Landowner consent to the construction of any mountain bike trail.

Although the Land Reform (Scotland) Act 2003 gives everyone statutory access rights to most land in Scotland, any person or organisation with a responsibility for the land has a legal duty of care to all users. This means that when constructing a formal mountain bike trail the landowner or leaseholder will have a duty of care to minimise risk to participants.

Facilities catering for visitors should have clear signs warning of hazards and ensure that facility is designed in such a way to minimise unwanted risk to participants.

We would recommend that you have any landowner agreements formalised by way of a lease or access agreement. These do not require to be formalised at this stage of the process but is worth discussing with the landowners at an early stage.

The process of agreeing leases / access agreements is complex and likely to be time consuming so is best to understand early on in the process.

For a greater understanding of access rights in Scotland see The Scottish Outdoor Access Code published by Natural heritage Scotland. www.outdooraccess-scotland.com

For a greater understanding of access rights relating to mountain biking in Scotland see 'Do the ride thing' published by Scottish Cycling (DMBinS). www.dmbins.com/files/Do_the_Ride_Thing.pdf

The Visitor Safety in the Countryside Group have published guidance on landowner and participant responsibility. vscg.co.uk/guiding-principles/responsibility

For more guidance on landowner liability see: A Brief Guide to Occupiers' Legal Liabilities in Scotland published by Scottish Natural Heritage 2005. www.snh.org.uk/pdfs/publications/heritagemanagement/occupiers.pdf

Idea – Strategic Definition

0 1 2 3 4 5 6 7

Checklist of tasks

Support Information

- Identify where this new facility fits within the wider provision

Identify recreational trends. See the **sportscotland** website for [participation data](#).

Identify existing facilities that could be competition or facilities in close proximity which may fuel demand within the area. See DMBinS website [where to ride](#) for a list of existing mountain biking facilities in Scotland.

Identify other facilities that your proposal may complement e.g. other outdoor and adventure facilities, cafes, changing, accommodation.

Case Study Developing trails in the local community, Lochore Meadows, Fife

Case Study Review of Scottish mountain bike developments and opportunities

Case Study Highlands DMBinS regional cluster report

- Identify the potential users

Based on the results of your demand survey or other research, list the number and type potential users.

Identify their needs e.g. local club coaching; family cycling; opportunities for progression.

- Identify what type of trail of training facility best meets the need of your expected users.

The Forestry Commission (FSC) has some relevant internal guidance that is available to view on the Visitor Safety in the Countryside website.

[vscg.org/good-practice/published/forestry-commission-operational-guidance](https://www.vscg.org/good-practice/published/forestry-commission-operational-guidance)

As the service provider of a public facility you have a duty under the Equity & Inclusion Act 2010 to make reasonable adjustments/provision to ensure that disabled participants are able to use your facility.

Consider what steps you can take to comply with this legislation.

Example FCS Equality Analysis

Example GFPVS Equality Analysis

- Identify a rough budget for the project

sportscotland's design datasheets will also provide a budget cost range for each facility type. Find these on the sportscotland website

www.sportscotland.org.uk/facilities/design_guidance/

- Research available funding

Who might help fund the project?

DMBinS's website lists a number of relevant funders

www.dmbins.com/developing/people--2/funding--5/sources-of-funding

sportscotland's website also lists sources of funding

www.sportscotland.org.uk/funding/funding/

DMBinS website has a [funding toolkit](#) which will help you understand the process.

- Create a list of funders to approach

Look at the key objectives & criteria of each funding stream. Does your project fit? Check any geographic constraints that the funders may have. Does your project fit?

What information will each different funder require? What will you be required to provide alongside your application? e.g. evidence of need, business plan, match funding, designs, quotations.

Do the funders have specific requirements for projects that they fund e.g. target groups, outcomes? Is your trail in or serving an [area of multiple deprivations](#)? Funders may take this into account.

Idea – Strategic Definition 0 1 2 3 4 5 6 7

Checklist of tasks	Support Information
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Identify likelihood and potential levels of funding

Make initial contact with funders (if possible) to discuss the idea for your project.
Ask for advice of how much funding may be available to your project.

Check to see if any of your project will require planning permission

Planning permission may be required for all or part of your proposed development. For advice on whether planning permission is required you should contact your Local Authority Planning Department. They will be able to advise on what they are likely to accept or reject with reference to current planning policy. If planning permission is required then work should not commence until planning permission has been granted.

If planning permission is required, it is advisable to engage in pre-application discussions before submitting a formal planning application. Each Local Authority can advise on their procedures for pre-application discussions, but in general they should be able to advise on the suitability of the proposal at this stage, and identify any information that should be submitted with the planning application. Pre-application discussions should simplify the submission of any subsequent planning application.

Contact details for all Local Authority Planning Departments, including the two National Parks, can be found on the Scottish Government website:
<http://www.gov.scot/Topics/Built-Environment/planning/Roles/Planning-Authorities/Information>

Produce a draft business plan.

This should include both the capital and operational costs for the facility over at least 5 years. Please see [Fourth Sector Development Business Plan Guide](#) for further information.

Example	Bespoke CIC Business Plan 2012-2016
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END OF STAGE 0

Preparation & Brief

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Checklist of tasks

Support Information

- Collate all the information you've gathered to date

- Shortlist competent trail design and construction professionals

There is no recognised qualification or professional body to regulate trail designers or contractors.

Cyclists' Touring Club (CTC) have collated a [list of trail designers](#). This list is provided for information only and should not be taken as a recommendation of competent professionals.

Do your research as to any designer or contractor's experience and competence before you shortlist them for a tender. Ask for references and follow them up. Speak to and visit other completed facilities for recommendations.

Example

Competent trail designer evaluation

- Consider your contract options

You don't need to decide yet but it's worth considering which contract route the project may follow, this will have implications on how you progress from here on.

Although there are a wide a range of contract types available there are two common contract routes through which a mountain bike trail will normally be delivered. There are benefits and considerations to each contract route identified in section 3. You should choose the contract route that best matches your priorities and circumstances.

OPTION 1: Design & build contract route

In this option you will appoint a contractor who has an 'in house' trail designer or is a trail designer themselves.

OPTION 2: Traditional contract route

In this option you will appoint a trail designer to design and manage the contract on your behalf. They will support you to employ a separate contractor who will then build their design.

- Consider your options for employing a design professional

Regardless of the preferred contract route, designers should be employed to complete only the feasibility study at this stage.

We would recommend that a tender process to select your designer/consultant is best practice, although not always required.

If you plan to use a design and build route it will be helpful for funders that you fairly and competitively tender the job at this stage. Evidence of this process may be required.

- Prepare tender information to select your professional

Collate the following information that the professionals will need to know:

- a summary of your work to date
- an explanation of your aspirations, strategic brief
- schedule of requirements
- accessibility requirements
- sustainability requirements
- budget
- project timetable

Preparation & Brief 01234567

Checklist of tasks Support Information

Create a scoring system to evaluate the consultant's tenders

You should create a scoring system for your tender so that all returns are evaluated fairly. The scoring system should consider the likely requirements of an individual project, and available points should be allocated to individual questions to reflect their relative importance.

The scoring system should consider:

- The skills they offer and how these reflect the requirement in question
- Their past experience and how this reflects the requirement in question
- What the consultant/contractor considers to be critically important about your project and how they will respond to those matters
- Key personnel and how these will reflect the requirement in question
- Their response to health and safety matters in terms of (where appropriate) design/construction/use

Other factors such as the financial stability/probity/corporate governance of the tendering companies may also need to be considered. These elements can be dealt with as a pass/fail scoring system.

Example Forestry Commission Scotland competent contractor evaluation

Tender

We would recommend that you tender the project to between three and six of the appropriate construction professionals. This allows you ensure that you have a fair and competitive price.

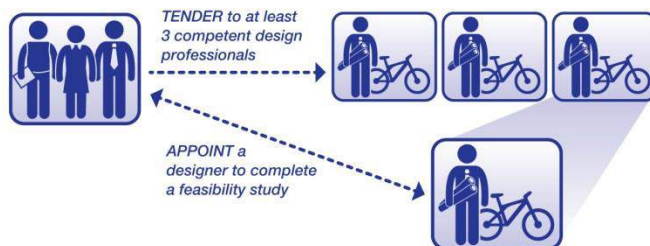
You should simultaneously provide each consultant with an identical information pack of what you require them to do for you. Each consultant should be given the same timescale in which to submit a fee tender. The timescale should be sufficient to allow the consultants to visit the site, assess the brief, raise any questions and submit a tender. Consultants should be given prior knowledge of how the tenders will be scored.

Any questions asked by tenders during the process should be collated and the answers circulated to all.

The Chartered Institute of Procurement & Supply have a downloadable guide on [How to Prepare and Evaluate Tenders](http://www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/#6904) for general products.

There are two construction industry specific guides to tendering which may also be helpful, both of which require to be purchased.

NBS Guide to Tendering for construction Projects www.thenbs.com
 JCT Tendering Practice Note 2012 www.jcttd.co.uk



Select a professional to develop a feasibility study on your behalf

Using the agreed scoring system, select an appropriate competent professional to develop a feasibility study.

Agree with them a schedule of services and fees for the preparation & brief phase.

Preparation & Brief

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Checklist of tasks

Support Information

- Employ and manage a competent professional to complete your feasibility study

FEASIBILITY STUDY - to be completed by your professional

- Assist the client in the brief making process
- Document the consultation process to date, highlighting opportunities and constraints and a needs appraisal of the proposal.
- Carry out options appraisal of the site options
- Identify site ownership
- Map site location and route options within them
- Identify conflict / cooperation with other site users
- Identify any statutory protections relevant to the sites
- Identify any tourism / economic development or business opportunities
- Establish if an environmental impact survey is required
- Obtain information Traffic access as legislation may pose restraints over the development
- Identify responsibilities under the construction (design and management) regulations (CDM)
- Produce a budget that includes capital build & consultant / design fees
- Outline operational, management and maintenance costs
- Identify volunteering opportunities throughout the project
- Start a risk register and identify mitigation measures

Case Study Kinblethmont Estate, Angus

Case Study Callendar Estate, Falkirk

- Create a project plan and agree it in advance with your trail designer

Consider the whole process as outlined in this document and create a timeline. Allow generous periods of time for confirming any legal agreements and securing funding as these elements are often time consuming.

Each stage should be SMART (specific, measurable, achievable, realistic, timely)

Agree the roles of everyone within the project team in advance.

- Establish your own duties under the CDM regulations

Under the Construction Design and Management Regulations (CDM), the client, designer and contractor are legally obliged to undertake some duties to ensure the health and safety of site workers. This early consideration will ensure that the construction methods and design are put together with contractor and end user safety in mind.

Information of each duty holder responsibilities can be found on the [HSE website www.hse.gov.uk](http://www.hse.gov.uk)

Paths for all have [A Guide to the Construction](#) (Design and Management) Regulations 2007 relevant to trail construction alongside the more relevant [2015 update](#)

CITB is the Industry Training Board for the construction industry www.citb.co.uk

Their website has an informative [infographic relating to the CRM responsibilities](#)

END OF STAGE 1

Concept Design 01234567

Checklist of tasks	Support Information
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- Formalise agreements with landowners

We would recommend that you have any landowner agreements formalised by way of a lease or access agreement.

The process of agreeing leases / access agreements is complex and likely to be time consuming so it is best to understand this early on in the process.

For a greater understanding of access rights in Scotland
The Scottish Outdoor Access Code published by Natural Heritage Scotland.
www.outdooraccess-scotland.com

For a greater understanding of access rights relating to mountain biking in Scotland 'Do the ride thing' published by Scottish Cycling (DMBinS).
www.dmbins.com/files/Do_the_Ride_Thing.pdf

The Visitor Safety in the Countryside Group has published guidance on landowner and participant responsibility.
vscg.co.uk/guiding-principles/responsibility

For more guidance on landowner liability see:
A Brief Guide to Occupiers' Legal Liabilities in Scotland published by Scottish Natural Heritage 2005.
www.snh.org.uk/pdfs/publications/heritagemanagement/occupiers.pdf

Funders will often require this to be agreement formalised prior to submission of any funding application.

- Formalise service level agreements with any supporting partners

A service level agreement (SLA) is a contract between a service provider (either internal or external) and the end user that defines the level of service expected from the service provider. These can be arranged with sponsors, bike shops and or local councils.

Template	Service level agreements
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- Develop outline proposals

OUTLINE PROPOSALS

- Design concept map / design layout with an idea of technical trail features
- Produce outline specifications
- Identify initial construction costs & designer / consultant fees
- Finalise feasibility study

- Apply for planning permission

If you require planning permission for any elements of you project you should apply for it at this stage.

- Apply for funding

DMBinS website has a [funding toolkit](#) which will help you understand the process.

DMBinS's website lists a number of relevant funders.
www.dmbins.com/developing/people--2/funding--5/sources-of-funding

sportscotland's website also lists sources of funding.
www.sportscotland.org.uk/funding/funding/

Ensure that your project fits with the objectives of each fund prior to applying.

Concept Design 01234567

Checklist of tasks Support Information

Decide on the appropriate procurement route

Although there are a wide a range of contract types available, there are two common contract routes through which a mountain bike trail will normally be delivered.

OPTION 1: Design & build contract route

This option will see you employ a contractor to build the job who will have an in-house designer or partnership with a designer.

POSITIVES

- The client will have security over the overall project cost, should issues arise during construction the contractor is still required to deliver as per the contract.
- Two tenders will be required in total
 - one for the feasibility/outline design, (which you've already done by this stage)
 - one tender that includes construction design work as well as construction contract.
- Only one point of contact for the client.

CONSIDERATIONS

- Much as the trail designers will be keen to deliver a quality product for their own reputation they will not be working on your behalf. They will be focused on bringing the project in on time and budget therefore a common negative of a design and build contract is that the quality may suffer.
- Funding for the full contract must be in place before the detailed design is developed.
- The client won't know exactly what they're getting at the point they let the contract.



OPTION 2: Traditional contract route

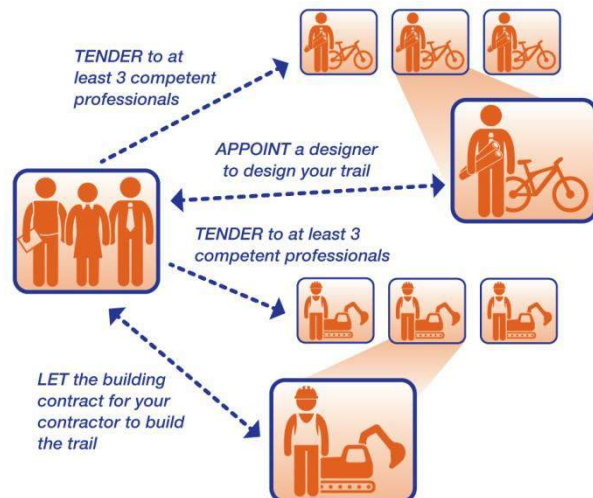
This option is will see you employ a trail designer to design the trail and thereafter support you to a select a contractor by tendering and then manage the construction contract on your behalf.

POSITIVES

- The designer will be working on your behalf this ensures quality of the finished product.
- It will be easier to involve the community in the build process.
- Construction design can be developed before you have the funds in place to build the project, this ensures that clients 'know what they're getting' prior to letting the contract.
- Fundraising can continue alongside the design development.

CONSIDERATIONS

- As a client you have less control over the final cost, if issues arise during construction then the project will need to be redesigned or reduce the scope of the project to maintain the price. Alternatively additional funds may be found to resolve issues.
- Three tenders will be required in total
 - one for the feasibility/outline design, (which you've already done by this stage)
 - one for the construction design work (although your may continue with the feasibility designer)
 - one for the construction contract.



END OF STAGE 2

Developed Design

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Checklist of tasks

OPTION 1: Design & build contract route

Within a design and build the contractor will design the project once you have contracted them, so the next part of the process focuses on the tender process.

- Select a number of appropriate contractors who have the experience and competence to be able to construct and design your facility**

There is no recognised qualification or professional body to regulate trail designers or contractors.

Cyclists' Touring Club (CTC) have collated a [list of trail designers](#). This list is provided for information only and should not be taken as a recommendation of competent professionals.

Do your research as to any contractor's experience and competence before you shortlist them for a tender. Ask for references and follow them up. Speak to and visit other completed facilities for recommendations.

Example Competent Trail Designer Evaluation

- Prepare tender information to select your contractor / designer team**

Collate the following information that should be included within your tender package:

- Contract particulars from the selected standard contract
- Feasibility study including your stage 2 concept design and cost information and any site information gathered to date
- Schedule of requirements
- Accessibility requirements
- Sustainability requirements
- Budget
- Project timetable
- Any phased completion that is desired
- Any planning or legislative constraints

We would strongly recommend the use of a 'standard contract' such as an [NEC](#) developed by the Institute of Civil Engineers or a [SBCC D&B Contract](#) developed by the Scottish Building Contract Committee, as these are written as examples of current best practice. We would recommend against any form of bespoke contract. More information on the standard contracts is available on the respective websites; Scottish Building Contract Committee www.sbcconline.com
NEC Contracts www.neccontract.com

OPTION 2: Traditional contract route

Within a traditional contract the project is fully designed prior to the tender of a contractor so next part of the process focuses on design.

- Decide on your trail designer**

If you are happy with the work that your existing trail designer has done on the outline proposal then you are can continue to work with that designer, however at this stage you have an option to go back out to the market to find a different trail designer. If you chose to do this follow the procedure as described in section 1, starting on page 7.

- Write a job specification**

Your Trail Designer will help you to agree a job specification for them to develop the next stage of your project.

This should include the tasks listed below

- Hold community consultations on the design and incorporate feedback
- Accurately map the trail corridor
- Finalise technical design
- Specify technical features
- Create drawings, showing flow of route, feature-by-feature or divided into sections
- Design prescription for trail grading
- Design trailhead and signage locations
- Create Bill of Quantities to include volumes of aggregate and quantities of other materials, fees and construction costs
- Fulfill the principle designers duties under the CDM regulations 2015
- Record construction / maintenance 'Hazard Elimination'
- Ensure the project conforms to environmental legislation/good practice
- Produce a maintenance programme
- Produce a maintenance budget

Developed Design 01234567

Checklist of tasks

OPTION 1: Design & build contract route

- Create a scoring system to evaluate the contractor's tenders.**

You should create a scoring system for your tender so that all returns are evaluated fairly. The scoring system should consider the likely requirements of an individual project and available points should be allocated to individual questions to reflect their relative importance.

The scoring system should consider:

- The skills they offer and how these reflect the requirement in question
- Their past experience and how this reflects the requirement in question
- What the consultant/contractor considers to be critically important about your project and how they will respond to those matters
- Key personnel and how these will reflect the requirement in question
- Their response to health and safety matters in terms of (where appropriate) design/construction/use

Within a design & build contract the cost is more likely to be a fixed element throughout the tenders so the weighting of the quality should be higher than cost.

Other factors such as the financial stability/probity/corporate governance of the tendering companies may also need to be considered. These elements can be dealt with as a pass/fail scoring system.

Example	Forestry Commission Scotland competent contractor evaluation
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Example	Health & Safety Questionnaire for Contractors
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- Prior to tendering your project ensure that you have the majority of your funding in place**

OPTION 2: Traditional contract route

- Agree design/consultant fees for the developed & /or technical design phases of the project**

When following a traditional contract route you should agree fees with your designer/consultant to cover the developed design & technical design phases of the project.

These design phases may be separated if preferred. If your project includes any indoor accommodation or works that would be subject to a building warrant a phased approach would be advised. For the majority of mountain bike training and trail facilities the phases can be developed in quick succession.

- Employ your trail designer to complete the developed design phase:**

- Hold community consultations on the design and incorporate feedback into the design
- Accurately map the trail corridor
- Specify technical features
- Fulfill the principle designers duties under the CDM regulations 2015
- Record construction/maintenance 'Hazard Elimination'
- Ensure the project conforms to environmental legislation/good practice

- Review the design information produced to date with your trail designer**

The review is an opportunity for the client to have input into the design.

Traditional Contract route: **END OF STAGE 3**

Developed Design

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Checklist of tasks

OPTION 1: Design & build contract route

OPTION 2: Traditional contract route

Tender

We would recommend that you tender the project to between three and six of the appropriate construction professionals. This allows you to ensure that you have a fair and competitive price.

You should simultaneously provide each consultant with an identical information pack of what you require them to do for you. Each consultant should be given the same timescale in which to submit a fee tender. The timescale should be sufficient to allow the consultants to visit the site, assess the brief, raise any questions and submit a tender. Consultants should be given prior knowledge of how the tenders will be scored.

Any questions asked during the process should be collated and the answers circulated to all. You may want to arrange a site visit day where all contractors are invited.

The Chartered Institute of Procurement & Supply have a downloadable guide on [How to Prepare and Evaluate Tenders](#) for general products.

www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/#6904

There are two construction industry specific guides to tendering which may also be helpful, both of which require purchase.

NBS Guide to Tendering for construction Projects

www.thenbs.com

JCT Tendering Practice Note 2012

www.jctltd.co.uk

Score the returned tenders

Using the agreed scoring system to select an appropriate competent professional to construct your design.

You may want to interview the top two contactors to aid your final decision.

Compile a tender report

This will allow you to compare a summary of the returned tenders. This should document the scores of your tenders in line with your scoring system.

Developed Design

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Checklist of tasks

OPTION 1: Design & build contract route

OPTION 2: Traditional contract route

Select a contractor to design and construct your project.

Agree with them schedule of services, that should include the tasks below:

- Hold community consultations on the design and incorporate feedback
- Accurately map the trail corridor
- Finalise technical design
- Specify technical features
- Create drawings, showing flow of route, feature-by-feature or divided into sections
- Design prescription for trail grading
- Design trailhead and signage locations
- Create Bill of Quantities to include volumes of aggregate and quantities of other materials, fees and construction costs
- Fulfill the principle designers & main contractors duties under the CDM regulations 2015
- Record construction/maintenance 'Hazard Elimination'
- Ensure the project conforms to environmental legislation/good practice
- Produce a maintenance programme
- Produce a maintenance budget
- Source and manage materials on site
- Manage the building site in line with CDM regulations
- Construct trail in line with finalised technical design
- Install appropriate signage throughout proposal

Ensure that you have the following in place prior to letting any contract:

- a preferred contractor
- a finalised contract sum in line with your client requirements.
- a full funding profile matching the total project cost covering both construction and design phases

Developed Design

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Checklist of tasks

OPTION 1: Design & build contract route

- Ensure you have complied with all funders requirements and are authorised to let the contract.

- Employ your contractor by letting the contract

Contract documents should be signed by contractor first then the employer

- Contractors & design team commence the developed design phase including the following tasks:

- Hold community consultations on the design and incorporate feedback
- Accurately map the trail corridor
- Specify technical features
- Fulfill the principle designers duties under the CDM regulations 2015
- Record construction/maintenance 'Hazard Elimination'
- Ensure the project conforms to environmental legislation/good practice

- Notify any unsuccessful tenders

Design & Build Contract route: **END OF STAGE 3**

Technical Design

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Checklist of tasks

OPTION 1: Design & build contract route

- Your contractor may complete the technical design phase

- Create drawings, showing flow of route, feature-by-feature or divided into section
- Finalise technical design
- Design prescription for trail grading
- Design trailhead and signage locations
- Create a Bill of Quantities to include volumes of aggregate and quantities of other materials, fees and construction costs
- Produce a maintenance programme
- Produce a maintenance budget
- Continue to fulfill the principle designers duties under the CDM regulations 2015
- Record any developments of construction/maintenance 'Hazard Elimination'
- Continue to ensure the project conforms to environmental legislation/good practice

Design & Build Contract route: END OF STAGE 4

The contractor may also complete stage 4 in conjunction with the subsequent construction stage 5.

OPTION 2: Traditional contract route

- Your trail designer will now complete the technical design phase

- Create drawings, showing flow of route, feature-by-feature or divided into section
- Finalise technical design
- Design prescription for trail grading
- Design trailhead and signage locations
- Create a Bill of Quantities to include volumes of aggregate and quantities of other materials, fees and construction costs
- Produce a maintenance programme
- Produce a maintenance budget
- Continue to fulfill the principle designers duties under the CDM regulations 2015
- Record any developments of construction/maintenance 'Hazard Elimination'
- Continue to ensure the project conforms to environmental legislation/good practice

- Approve final design

No more client changes should be made after this point or they are likely to incur significant cost.

Once you have finalised the design your trail designer will be able to help you tender the project to source a contractor.

- Your trail designer will be able to help you select a number of appropriate contractors who have the experience and competence to construct your facility

There is no recognised qualification or professional body to regulate trail designers or contractors.

Cyclists' Touring Club (CTC) have collated a [list of trail designers](#). This list is provided for information only and should not be taken as a recommendation of competent professionals.

Do your research as to any contractor's experience and competence before you shortlist them for a tender. Ask for references and follow them up. Speak to and visit other completed facilities for recommendations.

Technical Design

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Checklist of tasks

OPTION 1: Design & build contract route

OPTION 2: Traditional contract route

- Your trail designer will be able to help you prepare tender information to select your contractor.

Information to included within your tender package

- Contract particulars and details of the selected standard form of contract.
- Developed design drawings, showing the flow of route, feature-by-feature or divided into sections.
- Site information & surveys
- Design prescription for trail grading
- Design trailhead and signage locations
- Bill of Quantities to include volumes of aggregate and quantities of other materials, fees and construction costs
- Schedule of requirements
- Accessibility requirements
- Sustainability requirements
- Budget
- Project timetable
- Any phased completion that is desired
- Any planning or legislative constraints
- Pre construction H&S information

We would strongly recommend the use of a 'standard contract' such as an [NEC](#) developed by the Institute of Civil Engineers or a [SBCC](#) Contract developed by the Scottish Building Contract Committee, as these are written as examples of current best practice. We would recommend against any form of bespoke contract. More information on the standard contracts is available on the respective websites;

Scottish Building Contract Committee
www.sbcconline.com
 NEC Contracts
www.neccontract.com

Technical Design 01234567

Checklist of tasks

OPTION 1: Design & build contract route

OPTION 2: Traditional contract route

- Create a scoring system to evaluate the contractors tenders.**

You should create a scoring system for your tender so that all returns are evaluated fairly. The scoring system should consider the likely requirements of an individual project and available points should be allocated to individual questions to reflect their relative importance.

The scoring system should consider:

- The skills they offer and how these reflect the requirement in question
- Their past experience and how this reflects the requirement in question
- What the consultant/contractor considers to be critically important about your project and how they will respond to those matters
- Key personnel and how these will reflect the requirement in question
- Their response to health and safety matters in terms of (where appropriate) design/construction/use

Within a traditional contract the design is a fixed element and the quality is in line with specification throughout the tenders, so the weighting of the cost could be higher than quality if desired.

Other factors such as the financial stability/probity/corporate governance of the tendering companies may also need to be considered. These elements can be dealt with as a pass/fail scoring system.

Example	Forestry Commission Scotland competent contractor evaluation
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Example	Health & Safety Questionnaire for Contractors
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- Ensure you have all of your funding in place before you tender the project**
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Technical Design

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Checklist of tasks

OPTION 1: Design & build contract route

OPTION 2: Traditional contract route

Tender

We would recommend that you tender the project to between three and six of the appropriate construction professionals. This allows you ensure that you have a fair and competitive price.

You should simultaneously provide each consultant with an identical information pack of what you require them to do for you. Each consultant should be given the same timescale in which to submit a fee tender. The timescale should be sufficient to allow the consultants to visit the site, assess the brief, raise any questions and submit a tender. Consultants should be given prior knowledge of how the tenders will be scored.

Any questions asked during the process should be collated and the answers circulated to all. You may want to arrange a site visit day where all contractors are invited.

The Chartered Institute of Procurement & Supply have a downloadable guide on [How to Prepare and Evaluate Tenders](#) for general products.

www.cips.org/en-GB/Knowledge/Procurement-topics-and-skills/#6904

There are two construction industry specific guides to tendering which may also be helpful, both of which require purchase.

NBS Guide to Tendering for construction Projects
www.thenbs.com

JCT Tendering Practice Note 2012
www.jcttd.co.uk

Score the returned tenders

Using the agreed scoring system, select an appropriate competent professional to construct your design.

You may want to interview the top two contactors to aid your final decision.

Technical Design

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Checklist of tasks

OPTION 1: Design & build contract route

OPTION 2: Traditional contract route

Your trail designer will compile a tender report

This will allow you to compare the returned tenders. This should document the scores of your tenders in line with your scoring system.

- Compile tender report

Select your preferred contractor

Agree with them a schedule of services, that should include:

- Hold community consultations on the design and incorporate feedback
- Accurately map the trail corridor
- Finalise technical design
- Specify technical features
- Create drawings, showing flow of route, feature-by-feature or divided into sections
- Design prescription for trail grading
- Design trailhead and signage locations
- Create a Bill of Quantities to include volumes of aggregate and quantities of other materials, fees and construction costs
- Fulfill the principle designers & main contractors duties under the CDM regulations 2015
- Record construction/maintenance 'Hazard Elimination'
- Ensure the project conforms to environmental legislation/good practice
- Produce a maintenance programme
- Produce a maintenance budget
- Source and manage materials on site
- Manage the building site in line with CDM regulations
- Construct trail in line with finalised technical design
- Install appropriate signage throughout proposal

Ensure that you have the following in place prior to letting the contract:

- a preferred contractor
- a finalised contract sum for the construction and design phases
- a full funding profile matching the total project cost covering the contract cost

Technical Design

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Checklist of tasks

OPTION 1: Design & build contract route

OPTION 2: Traditional contract route

- Ensure you have complied with all funders requirements and are authorised to let the contract

- Employ your contractor by letting the contract

Contract docs signed by contractor first then the employer

It is usual for contractors to require a few weeks 'mobilisation' prior to start on site, this should be outlined in their tender return

- Notify any unsuccessful tenders

Traditional Contract route: **END OF STAGE 4**

Construction 01234567

Checklist of tasks

OPTION 1: Design & build contract route

Set out a 'request for change' procedure

Regardless of the contract type, once the contract is let it is a potentially costly process for the client to change their mind with regards to the design.

It is important you have a robust change management process in place when you start on site so that the contractor, designer and client group are all clear who is empowered to issue requests for change to the already agreed design.

Requests for change should always be done in writing and cost agreed before implementation.

OPTION 2: Traditional contract route

Set out a 'request for change' procedure

Regardless of the contract type once, the contract is let it is a potentially costly process for the client to change their mind with regards to the design.

It is important you have a robust change management process in place when you start on site so that the contractor, designer and client group are all clear who is empowered to issue requests for change to the already agreed design.

Requests for change should always be done in writing and cost agreed before implementation.

When the project starts on site your contractor will

- Arrange a pre-start meeting
- Monitor and manage the construction assessing and managing challenge and risk
- Ensure appropriate insurances are in place

When the project starts on site your trail designer will

- Arrange a pre-start meeting
- Administer the terms of the building contract on your behalf
- Agree frequency and procedure for site visits
- Ensure your contractor has the appropriate insurances in place
- Define inspection procedures, methodology and frequency during the build process.

When the project build is underway your contractor will

- Test the completed trail to ensure it is to specification and that it adheres to the criteria for the corresponding level of trail
- Manage the delivery, quality and storage of material on site
- Review, test the route and redesign in line with their contract to ensure an appropriate standard of workmanship at completion
- Develop forward H&S policies and complete risk, review assessments and (construction & maintenance) hazard elimination records
- Send requests for intermediate payments to the client
- Manage contingencies and site issues.
- Organise regular site meetings

When the project build is underway your trail designer will

- Administer the terms of the building contract on your behalf
- Inspect goods and materials delivered on site
- Test completed trail to ensure it's to specification and that it adheres to the criteria for the corresponding level of trail
- Identify incomplete tasks or substandard works (snagging) and ensure all work identified is completed
- Develop forward H&S policies and complete risk, review assessments and (construction & maintenance) hazard elimination records.
- Certify intermediate payments to the contractor
- Manage contingencies and site issues.
- Organise regular site meetings

Construction

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Checklist of tasks

OPTION 1: Design & build contract route

- You will required to pay the interim certificates within the period stated in your contract

- Start planning for the facility opening

Now is the time to further develop your operational processes.

- Begin selecting and training your staff in line with your business plan

The Cycling Touring Club run Volunteer Trail Repair Co-ordinator & Trail Inspection Courses which will help your staff/volunteers develop the required skills.

www.dmbins.com/developing/trails-page--2/courses

- Develop an external communication and publicity strategy.

Begin work on a marketing and communication strategy for your facility
Ensure consistent brand representation and message across all mediums.

[DMBinS guide on marketing mountain biking](#) may be useful

OPTION 2: Traditional contract route

- You will required to pay the interim certificates within the period stated in your contract

- Start planning for the facility opening

Now is the time to further develop your operational processes.

- Begin selecting and training your staff in line with your business plan

The Cycling Touring Club run Volunteer Trail Repair Co-ordinator & Trail Inspection Courses which will help your staff/volunteers develop the required skills.

www.dmbins.com/developing/trails-page--2/courses

- Develop an external communication and publicity strategy.

Begin work on a marketing and communication strategy for your facility
Ensure consistent brand representation and message across all mediums.

[DMBinS guide on marketing mountain biking](#) may be useful

Construction 01234567

Checklist of tasks Support Information

OPTION 1: Design & build contract

When the project build is complete your contractor will

- Certify when the works have reached practical completion by issuing a Practical Completion certificate
- Test completed trail to ensure it is to specification and that it adheres to the criteria for the corresponding level of trail
- Identify incomplete tasks or substandard works (snagging) and ensure all work identified is completed
- Create as-built diagrams and GPS route of entire network
- Complete H&S policies and complete risk, review assessments and (construction & maintenance) hazard elimination records.
- Define inspection procedures, methodology and frequency for when the trail is in use
- Provide maintenance manual
- Agree the contractor's final account
- Review the interpretation and signage specification.
- Review experience and ensure that signage and interpretation is sufficient
- Create signage design map/interpretation
- Hold handover meeting
- Agree timescales for trail opening

OPTION 2: Traditional contract

When the project build is complete your trail designer will

- Certify when the works have reached practical completion by issuing a Practical Completion certificate
- Test completed trail to ensure it is to specification and that it adheres to the criteria for the corresponding level of trail
- Identify incomplete tasks or substandard works (snagging) and ensure all work identified is completed.
- Create as-built diagrams and GPS route of entire network
- Complete H&S policies and complete risk, review assessments and (construction & maintenance) hazard elimination records
- Define inspection procedures, methodology and frequency for when the trail is in use
- Provide maintenance manual
- Administer the terms of the defects liability period
- Agree the contractor's final account
- Review the interpretation and signage specification.
- Review visitor experience and ensure that signage and interpretation is sufficient
- Create signage design map/interpretation
- Hold handover meeting
- Agree timescales for trail opening.

Pay the final certificates within the period stated in your contract

Design & Build Contract route: **END OF STAGE 5**

Pay the final certificates within the period stated in your contract

Traditional Contract route: **END OF STAGE 5**

Handover 01234567

Checklist of tasks	Support Information
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- | | |
|---|--|
| <input type="checkbox"/> Ensure all accounts are settled | Submit both final claims to funders and end of project reports. |
| <input type="checkbox"/> Create a defects log to share with the contractor | The contract will have a period of 'making good defects' where the contractor is responsible for fixing any found issues with the construction. This period will vary depending on what was set up with the original contract paperwork. Check this carefully and keep accurate records. |

- | | |
|--|--|
| <input type="checkbox"/> Finalise the business plan | Develop management systems and ongoing finance options. Ensure that you have processes & procedures in place that outline responsibilities. Work with partner agencies, business, organisations and/or clubs to ensure that all parties are engaged and that the targets for the project are achieved. |
|--|--|

- | | |
|--|--|
| <input type="checkbox"/> Ensure all you signage is up | As part of your trail build you will have hazard identification signage along the route. Check that this is all in place. Ensure any information boards are in place. Ensure that any funders signage is up in line with their requirements. |
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Example	Forestry Commission Signage
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- | | |
|--|--|
| <input type="checkbox"/> Plan an official opening | The event could incorporate coaching sessions and come and try sessions to gain interest from potential users. Ensure you've invited local press to cover the event and add to your publicity. Ensure you invite representatives of your funders to any opening event. |
|--|--|

- | | |
|---|---|
| <input type="checkbox"/> Create a marketing and communication strategy | Develop an external & internal communication and publicity strategy. Ensure consistent brand representation and message across all mediums.
DMBinS guide on marketing mountain biking may be useful. |
|---|---|

- | | |
|--|--|
| <input type="checkbox"/> Create an ongoing maintenance and inspection programme | <p>An annual budget of approximately 5% of the capital build cost of the facility is likely to be required to maintain the facilities. Those with responsibilities for the trail must be able to show they have been suitably careful in its construction and maintenance in relation to the features of the trail and users' level of skill. Cyclists should be advised to cycle responsibly within their capabilities, and all users advised of the need to show consideration for other types of trail user. The landowner should undertake regular inspections in line with an appropriate risk assessment. Findings and action taken should be recoded to demonstrate due diligence.</p> <p>Implement inspection process and create and maintain records of inspection and maintenance.</p> <p>Identify ongoing management requirements eg strimming, drainage,</p> <p>Organise volunteering opportunities and 'Dig Days'</p> |
|--|--|

<input type="checkbox"/> Undertake a benefit of risk assessment	Example Benefit of risk assessment theory
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Example	Example of benefit of risk assessment
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Handover

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Checklist of tasks

Support Information

- Create systems for continued evaluation and feedback**

This may include records and systems of feedback from staff, cyclists, other users and stakeholders.

This will allow you to identify any further work to be completed or required trail design changes.

Create and implement an ongoing review process at agreed intervals to ensure that the project is achieving its objectives.

- Create and maintain a system for recording and reporting accidents and near misses**

Follow the H&S plan for the facility.

Manage interactions with the human and natural environment.

The Health and Safety Executive (HSE) have a document on their website called [Investigating accidents and incidents](https://www.hse.gov.uk/investigating-accidents-and-incidents/) which can guide you through a methodology. www.hse.gov.uk

- Get your staff & volunteers trained**

Cycling Touring Club Volunteer Trail Repair Co-ordinator & Trail Inspection Courses www.dmbins.com/developing/trails-page--2/courses

END OF STAGE 6

In use 01234567

Checklist of tasks Support Information

- Monitor contract requirements and service level agreements**

Ensure that respective obligations are met
- Ongoing Management**

Review and respond to developments and changes in the sector to ensure the project continues to meet its objectives.
Monitor and manage ongoing financial requirements and budgets for maintenance and future developments.
- Create a marketing and communication strategy**

Monitor and manage internal and external communications and publicity.
Work with partners to cross promote local clubs, and other places to ride.
Ensure consistent brand representation and message across all mediums.
[DMBinS guide on marketing mountain biking](#) may be useful
- Implement Regular inspections and maintenance programme**

Implement inspection process and create and maintain records of inspection and maintenance.

Implement ongoing management requirements eg strimming, drainage,
Organise volunteering opportunities and 'Dig Days'

Example
Example Maintenance Record report
- Operate evaluation and feedback system**

This will allow you to identify any further work to be completed or required trail design changes.
- Implement a system for recording and reporting accidents and near misses.**

Follow the H&S plan for the facility.

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