

# **PROPOSAL – ASSET MANAGEMENT & CAPITAL PLANNING FOCUS**

## **EXECUTIVE SUMMARY & PROFESSIONAL SERVICES PROPOSAL**

### **Village of Foxfire – Comprehensive Facilities & Infrastructure Asset Management Program**

#### **Prepared for:**

Village of Foxfire, Moore County, North Carolina

#### **Prepared by:**

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## **I. PURPOSE AND INTENT OF ENGAGEMENT**

As the Village of Foxfire continues to grow, municipal buildings, recreational amenities, and public infrastructure are experiencing increasing operational and maintenance demands. Growth introduces complexity, and without a structured system in place, many municipalities default to reactive repairs—leading to higher long-term costs, reduced efficiency, and limited visibility into future needs.

This engagement transitions the Village to a long-term, engineering-focused asset management program built around consistent documentation, proactive planning, and transparent reporting. Rather than functioning as a traditional maintenance provider, this approach supports long-range infrastructure stewardship and aligns with best practices for risk reduction, lifecycle forecasting, and strategic capital planning.

### **Purpose and Value of the Program**

The objective of this initiative is to establish a durable framework that improves how the Village documents, evaluates, and maintains its public assets. Key components include:

- Centralized asset documentation for inspections, repairs, warranties, reports, and historical data
- Structured and repeatable reporting formats that allow year-over-year comparison and trend identification
- Proactive capital planning that ties condition assessments to long-term funding forecasts
- Engineering-focused evaluations that highlight failure risks, deterioration mechanisms, and service-life expectations
- Risk reduction strategies that prioritize repairs and replacements based on safety, performance, and financial impact

Combined, these elements give Village leadership a clear understanding of present asset conditions and future budget requirements, strengthening long-term planning and fiscal responsibility.

## **Single Point of Contact for Streamlined Delivery**

This engagement provides the Village with a dedicated single point of contact who brings a rare blend of field experience, operational capacity, and engineering-oriented planning expertise:

- Local contractor with integrated subcontractor support, ensuring timely, cost-efficient project delivery
- Certified drainage contractor and experienced heavy equipment operator, enabling effective management of complex site, stormwater, and infrastructure issues
- Certified Project Management Professional (PMP) skilled in facility condition analysis, lifecycle modeling, and structured capital planning methodologies
- Provider of consultation and remedy services, offering both diagnostic expertise and practical solutions to address identified conditions
- Direct coordination and planning with Village leadership as needed to provide required information and documentation on time in a consistent, actionable manner

This combination allows Foxfire to work with one resource capable of supplying both high-level planning and hands-on remediation—an uncommon advantage for municipalities balancing growth with infrastructure needs.

## **Program Priorities and Long-Term Benefits**

The engagement is intentionally structured to support Foxfire’s needs not only today but throughout future periods of growth. Key priorities include:

- Engineering-focused asset evaluations across all Village facilities, parks, stormwater systems, and infrastructure
- Transparent documentation for every maintenance action, inspection, repair recommendation, and cost justification

- Lifecycle-based planning that anticipates future upgrades, replacements, and reinvestment windows
- Risk reduction measures that help the Village proactively address vulnerabilities before they become failures
- Consultation and remedy services that provide clear corrective actions, cost ranges, and implementation strategies
- Budget-aligned project delivery, designed around municipal funding cycles and long-range capital planning goals

By emphasizing structured reporting, engineering principles, and proactive planning, the Village of Foxfire will maintain a clear, strategic understanding of infrastructure conditions and future funding needs. This strengthens long-term stewardship, improves decision-making, and ensures public resources are invested responsibly.

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## **II. FACILITIES & INFRASTRUCTURE ASSET MANAGEMENT SERVICES (MONTHLY)**

### **A. Facility Assessment & Reporting Program**

- 1. Monthly Asset Assessment Reports**
  - Formalized written summaries detailing the condition of municipal buildings, pavilions, recreation structures, restrooms, and related facilities.
  - Each summary includes findings, risk indicators, photos, and recommended maintenance actions.
  - All reports stored in a shared electronic document repository jointly managed between the Village and the contractor.
- 2. Annual Facility Condition Report (FCR)**
  - A comprehensive, once-per-year report evaluating structural integrity, component lifecycles, deficiencies, and overall facility performance.
  - Includes condition scoring, estimated remaining service life, and recommended capital budget ranges.
  - Serves as the Village's primary baseline document for long-term planning.
- 3. Project Priority Ranking Matrix Development**
  - Creation and management of a standardized scoring tool evaluating safety impact, cost severity, lifecycle urgency, regulatory concerns, and resident impact.
  - Ensures that all projects and repairs are ranked objectively and transparently.
  - Updated monthly and integrated into budget workshops or capital meetings.
- 4. Capital Planning Memorandums (As Needed)**
  - Written memorandums summarizing anticipated capital projects, expenditure timing, and recommended funding strategies.

- Prepared for annual budget cycles, grant applications, or council planning sessions.
  - Includes scope outlines, conceptual cost ranges, and recommended procurement strategies.
5. **Preventative Maintenance & Long-Term Strategy Development**
- Creation of multi-year maintenance strategies designed to extend asset life and reduce unplanned costs.
  - Monthly refinement of maintenance checklists based on observed trends, material performance, and evolving facility needs.
  - Coordination with Village leadership to adjust schedule priorities as community needs change.

## **B. Implementation & Maintenance Support (Flexible, Need-Based)**

Routine corrective actions or minor maintenance items may be performed as part of the monthly service hours. Services include:

- Light fixture or component replacements
- Minor carpentry or surface repairs
- Playground and pavilion upkeep
- Cleaning, restocking, and surface maintenance
- Trash overflow response
- Pressure washing, gutter clearing, and exterior preservation tasks
- Minor sign, trim, or exterior element repairs

### **Monthly Professional Services Fee: \$3,250 per month**

(Not-to-exceed 24 labor hours without prior authorization)

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## **III. TRAIL SYSTEM AND AMENITY ASSET EVALUATION & SUSTAINABILITY SERVICES (QUARTERLY)**

### **A. Quarterly Trail & Recreation Infrastructure Assessment Reports**

A structured written report will be produced each quarter detailing:

- Erosion activity and drainage patterns
- Structural stability of trail base materials
- The consolidation and organization of materials used within the village in an organized, aesthetic manner

- Identification of areas where erosion is likely with the ability to deploy fencing, wattles or other erosion management strategies in a timely manner to avoid washouts and further damage
- Vegetation encroachment and safety considerations
- Surface compaction, wear, and maintenance needs
- Recommended corrective actions and material needs
- Priority ranking scores for upcoming trail projects
- Document cataloging into the repository for historical tracking

## **B. Trail Maintenance & Implementation Services**

This is a flexible maintenance plan with scalable options within the scope of our dedicated equipment and man hours that are allocated to this quarterly service. This could include the removal and disposal of invasive vegetation such as bamboo, snow removal, cutting firebreaks or removing underbrush if required.

Work will be completed in accordance with quarterly labor and equipment allocations:

- Removal of fallen or hazardous trees
- Vegetation management and pruning operations
- Surface grooming, regrading, and low-spot correction
- Hand finishing in limited-access areas
- The marking of hazards and imminent threats to residents
  - This also includes the marking and identification of hazards that may be associated with wildlife such as snake habitats, yellowjacket and hornet habitats and other wildlife hazards
- Hauling and disposal (two 10-ton loads per quarter)
- Stump grinding (added service)
- Final cleaning of trail surfaces
- Cleaning flatwork and other hard surfaces with a wheel loader mounted sweeper attachment such as paved surfaces, sidewalks and the pickleball court
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Quarterly resources include:

- 24 manual labor hours
- 24 equipment operator hours
- Use of small loader/tractor or compact track loader
- UTV hauling support
- Additional equipment supplied at no extra cost when within defined scope

**Quarterly Professional Services Fee: \$8,945 per quarter**

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## IV. PERFORMANCE STANDARDS

Legion Construction Services provides a standards-driven asset management approach built on accuracy, transparency, and reliability. Performance standards include:

1. Delivery of all monthly summaries and annual reports on schedule
2. Professional and workmanlike completion of field tasks
3. Work areas left safe, clean, and secured
4. Immediate notification of hazards requiring urgent action
5. Full documentation of assessments, reports, and completed work
6. Collaboration with Village staff to minimize public disruption
7. Compliance with all regulatory standards

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## V. INSURANCE REQUIREMENTS

The contractor maintains:

- General Liability
- Auto Liability
- Marine Services Policy
- Workers' Compensation
- HAZMAT-related coverages as required

The Village of Foxfire will be listed as **Additional Insured** at least ten (10) business days prior to contract initiation.

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## VI. TERM

The initial term is **one (1) year**, renewable upon mutual agreement.

Either party may terminate with thirty (30) days written notice, with the next scheduled monthly or quarterly service completed before termination becomes effective.

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## VII. CONCLUSION

This restructured asset management program provides the Village of Foxfire with a **documentation-driven, forward-looking, capital-focused infrastructure management system**. Through monthly reports, annual condition evaluations, project prioritization tools, and long-term maintenance strategies, the Village will gain predictable budgeting, reduced risk exposure, and improved asset longevity.

The contractor recommends that a one time, performance-based trail run be conducted to demonstrate contractor capabilities, competence and collaboration with village personnel at the rates listed above. This would be conducted with deliverables being identified no later than 10 business days prior to execution.