

# What's in *Your* Bid Documents?

C.A.S.H Spring Conference  
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## What are Bid Documents?

### ➤ Documents for Bidders:

- Bid Invitation
- Instructions to Bid
- Contract Forms
- Bid Bond
- Bid Forms and Bid Bond
- General Conditions
- Supplemental Conditions /Construction Administration Procedures
- Specifications, Drawings and Addenda

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## Why are Bid Documents Important?

- Legal documents that form the basis of your project
- They describe the What, Where, Who, How, and When of your project in detail
- Folsom case study

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## Who Prepares the Bid Documents?

- › District?
- › Legal Counsel?
- › Architect?
- › Construction Manager?

All may have good input

OR

District may already have complete documents

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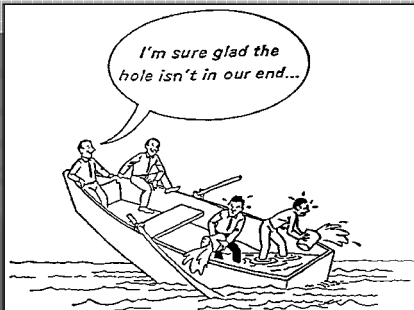
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Good Bid Documents keep your boat afloat

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## Start Early

- › Allow time for updates to documents
- › Have legal counsel review all revisions
- › Make sure Team has consistent documents
- › Ask consultants for “lessons learned” when updating and/or creating documents

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**Does your Delivery Method Effect your Bid Documents?**

**YES**

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**Does your Delivery Method Effect your Bid Documents?**



Can Pigs Fly?

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**How do Bid Documents differ with the different Delivery Methods?**

- > Design/Bid/Build
- > CM at Risk
- > CM Multi-Prime
- > Design/Build
- > Lease/Leaseback

i.e. Instructions to Bidders, Contract Forms, etc.

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## Design-Bid-Build

- Documents typically prepared by District, Architect, and Legal Counsel
  - Most Districts and Architects have boiler plate documents
  - Use “fillable blanks” system
  - 3<sup>rd</sup> party review recommended

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## Fillable Blanks: It's Bid Time!

- Have a checklist of all fillable blanks in document and their location in the document
- Distribute documents to Team before bid is issued
- Confirm Team is on board with documents and all questions have been asked – include in documents
- Double check – if they are not ready, your project is not ready to bid

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## CM at Risk/CM Multiple-Prime

- Architect, District, and Legal typically prepare documents
- CM has input – project/company specific information
  - Safety policy
  - Mold Prevention Plan
  - Etc.
- 3<sup>rd</sup> Party review recommended

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## CM Input Completed & Verified

- Verify unique items have been addressed and included
  - Insurance
  - Safety
  - Specific policies
- Documents have been reviewed/approved by all parties
- Information is clear and consistent

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## Design-Build

- Documents typically prepared by District, Architect, Legal, and Contractor
- Architect and Contractor must carefully coordinate all aspects of Front End Documents

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## Lease/Lease-Back

- Front End Documents are typically prepared by Lessee
- District & Architect may have input
- Legal review **extremely important**
- 3<sup>rd</sup> Party review recommended

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# Front End Document Sample Check List

ITEM DESCRIPTION	INVITATION TO BID	INSTRUCTIONS TO BIDDERS	CONTRACT FORMS	GENERAL CONDITIONS	SUPPLEMENTAL CONDITIONS
Address	X				
Administrative Action	X	X	X		
As-Built		X	X		
Bid Date	X	X			
Bid Documents	X	X			
Bid Form		X	X		
Bid Control No. - Day	X	X			
Bid Location	X	X			
Bid Procedure		X	X		
Bid Time	X	X			
Bidding Requirements		X			
Bonds			X		
Controlled Facility			X		
Change Order Procedure		X	X		
Clear Up		X	X		
Close Out		X			
Code of Safe Practices - construction		X	X		

Please refer to full size sample at the end of the handout

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# Front End Documents

- ▶ Items addressed in Front End Documents typically affected by Delivery method:
  - Bid Forms
  - Bid Requirements
  - Bonds
  - Change Order Procedures
  - Communication
  - Lean Releases
  - Payment Procedure
  - Insurance
  - Retention/Escrow Agreements
  - Prequalification
  - Contract Forms
  - Etc.

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"Looks like Tommy's running over budget again..."

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## Summary

- Front End Bid Documents are Extremely Important
- Major legal impact on project
- Start Early!
- Use 3<sup>rd</sup> Party review & checklist
- Solicit “lessons learned” from past project and consultants

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## Thank you for Joining Us

If you would like more information after the conference, please feel free to contact us.

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