

How Did That Happen?

The Calm Before the Storm

Preparing Bid Documents

Advertising Bids

Opening and Awarding



What are Bid Documents and Why are They so Important?

One shot at starting on the right foot!

What's Included?

- **Advertisement/Bid Invitation**
- **Bid Instructions**
- **Bid Form**
- **Contract Form**
- **Front end docs**
- **All Bond Requirements & Forms**

What's Included? Cont..

- **Sub List Requirements & Forms**
- **Notice of Award Form**
- **Notice to Proceed Form**
- **Insurance Requirements**
- **General and Supplementary Conditions**

What's Included? Cont..

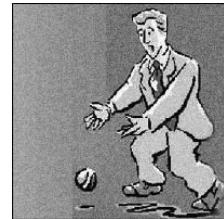
- **Technical Specifications**
- **Drawings**
- **Prequalification**
- **LCP**
- **All Addenda**

What's so Important?

- **Bid documents are the legal documents of your project!**
- **Exactly what's being built, the how and the when**
- **If it's not in your bid documents it's not in your project**

What's so Important? Cont..

- **Good bid documents protect you as the owner**
- **This is the period of time when you have the most influence on the project!**
- **Sloppy bid documents chase "good" bidders away**



Preparing Your Bid Documents

What you should look out for
and include....

Who Prepares Them?

- **District**
- **Architect and Consultants**
- **Construction Manager**
- **Legal Counsel**

What to Watch Out For

- **Don't forget the Local and State Approvals**
- **Encroachment issues**
- **Front End Documents and General Conditions MUST be current**
- **Is the schedule realistic?**
- **Strategic timing**
- **Bid protest procedures**



What to Watch Out For Cont..

- **Prequalification language**
- **Labor compliance language**
- **District standards**
- **Start date, phasing, completions**
- **SWPPP**
- **Alternates clearly defined including basis for award – be careful...**

What to Watch Out For Cont..

- **Include some unknowns for protection**
- **Unit Costs?**
- **RFI response time**
- **Submittal language**
- **Retention/Escrow requirements**

What to Watch Out For Cont..

- **Payment procedures - Schedule of Values**
- **Change Order request language**
- **Profit and overhead limits**
- **Critical Path Schedule**
- **As-builts**
- **Fingerprinting**

What to Watch Out For Cont..

- **Operating manuals and warranties**
- **Liquidated damages**
- **Weekly meeting requirements**
- **Coordination with other contracts**
- **Resolution of claims**
- **Termination language**

What to Watch Out For Cont..

- **Simplify the bidders' job – estimating and complexity**
- **District reviews everything**
- **Communicate early and often!**
- **Try to apply common sense in a very complex situation - KISS**
- **Give yourself the right to waive minor irregularities**

Review of Bid Documents

- **Give the review sufficient time**
- **Not a constructability review**
- **Ensure that team members have consistent documents throughout**
- **Pretend you are a bidder!**

Review of Bid Documents Cont..

- **Everyone that prepares the documents should thoroughly review them when “complete”**
- **Use a checklist**

Advertising Your Bids

It's not just an invitation...

Advertising

- **“Rattle the bushes”**
- **Formally introduces your project**
- **Project cost estimate?**
- **Include Prequalification and Labor Compliance Language**

Advertising Cont..

- **Constantly communicate – control rumors**
- **Valid issue or tactic?**

Prebid Meeting/Walkthrough

It's a wonderful project!

Prebid Meeting/Walkthrough

- **Mandatory or Optional?**
- **Call all of your typical bidders to let them know**
- **Identify site and project characteristics**
- **Opportunity for questions**
- **Nothing said should be construed as changing the bid documents!**

Prebid Meeting/Walkthrough Cont..

- **Labor Compliance Program**
- **Prequalification requirements**
- **Plans and specifications available**
- **Sign in and out (if mandatory)**

Bid Opening

More than opening an envelope...

Bid Opening

- **Basis for award – this will dictate bid form and docs – apparent low bidder**
- **Pick a strategic day – day of the week and competing projects**
- **Clearly indicate the place and time**

Bid Opening Cont..

- **Prominent easily accessible location**
- **Visible clock set to standard time**
- **Immediately stamp every bid**
- **Read out all bids**
- **Fax recaps to all bidders – include sub list for apparent low bidder**

Bid Opening Cont..

- **Architect and CM should assist**
- **Use evaluation/checklist form**
- **Is everyone licensed in the correct trade?**
- **Responsive & Responsible?**

Awarding your Bid and Executing a Contract

Almost there but the storm may
still be brewing...

Protests

- **Three days to protest**
- **Know who can protest**
- **Protests must be specific**
- **Send copy of protest to low bidder**
- **Investigate and respond to all protests**
- **Does protest meet all requirements?**

Awarding

- **Is everything in order?**
- **Notice of Award should be sent to low bidder after Board approval**
- **Secure required insurance, payment and performance bonds**
- **Contract execution**
- **Appropriate notice to proceed is issued**

Pre Construction Meeting

Let's Chat...

Pre Construction Meeting

- **Entire team should attend**
- **Meeting objectives and agenda**
- **Acknowledge what success means**
- **Expectations**
- **Define responsibility of each party**

Pre Construction Meeting Cont..

- **Include LCP checklist and sign off**
- **Establish paths of communication**
- **Verbalize the key points of the project and documents**
- **What's the process?**
- **Keep good minutes**



In Summary...

The fun has just begun!

Summary

- **Good bid documents are absolutely critical for the success of the project**
- **Bid documents protect you**
- **Advertising sets the stage**
- **It's not over with Opening and Awarding**
- **Be thorough**

