

ASSOCIATION of WOMEN CONTRACTORS

EDUCATIONAL SERIES: READING AND UNDERSTANDING BID DOCUMENTS

Presented by:

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INTRODUCTION

The majority of work performed by Subcontractors is awarded on a competitive basis, which means through a bid process

In order to solicit bids, Owners and General Contractors must make documents and information available to Subcontractors

Subcontractors often fail to understand the information contained in those documents, often become part of the contract obligations

What kinds of documents would you expect to find in a bid package?



BID PACKAGE DOCUMENTS

- ▶ A bid package contains all the documents and requirements needed to respond to a bid invitation.
- ▶ Not all Bid Packages are created equal. Some packages contain few documents, others many documents
- ▶ Contractors interested in bidding on the project need to enquire to determine the entire list of documents contained in the package.

WHAT DO YOU FIND IN THE BID DOCUMENTS

- ▶ The scope of work to perform
- ▶ Certification requirements
- ▶ Timeframe for construction
- ▶ Safety and Quality requirements
- ▶ Bidding / site conditions
- ▶ Bond or insurance requirements
- ▶ Tolerances
- ▶ Technical requirements
- ▶ Legal requirements
- ▶ And many more



BID DOCUMENTS SYSTEM

▶ According to the Construction Specifications Institute (CSI), there are five (5) main categories of Bid Documents:

- ▶ Bidding requirements
- ▶ Contract forms
- ▶ Contract terms & conditions
- ▶ Specifications
- ▶ Drawings

1. BIDDING REQUIREMENTS

Here are the main documents contained in the Bidding Requirements

- ▶ Invitation for Bid
- ▶ Instructions to Bidders
- ▶ Bid forms and attachments
- ▶ Bid security forms
- ▶ Scope of work
- ▶ Proposed project schedule

Invitation to Bid

INVITATION FOR BID

Bid proposals will be received by Absher/Kitchell J.V. **until 2:00 PM on Wednesday, November 14, 2018**. Bid proposals are to be emailed, hand delivered or faxed to the following contact:

Absher/Kitchell J.V. (Site Office)
Attn: Tom Kamp & Mark O'Donnell
1000 Shadow Road
Puyallup, WA 98372
Phone: 253.845.9944
Fax: 253.845.1925
bid@absherkitchell.net

The Owner assumes no responsibility for bids mailed but not received. Bid packages will be received and identified for the following contract:

I-5 Casino – Phase II
Tacoma, Washington
Bid Scope 5B – Structural Steel Installation: Atrium

All Subcontractors are required to be appropriately licensed contractors in the State of Washington.

The work site is located at the I-5 Casino project is Tacoma, Washington. Contractor shall complete all work as specified or indicated in the Contract Documents. The construction scope of work includes, but is not limited to:

- Steel Erection
- Steel Decking

Complete sets of Contract Documents and Bid Forms may be obtained beginning **Friday, October 26, 2018** by calling Sue Elliott or Kim Capp at Johnson Imaging System, Inc. at (253) 777-3429. A non-refundable deposit of **\$50.00** for each complete set of documents in electronic format on **disc** or **\$100** if **paper copy** is required. **Shipping is not included** in this price but is available through the printer if required. Checks shall be made payable to Johnson Imaging System, Inc. Only bidders receiving full sets of documents will be on record to receive Addenda via email.

Instructions to Bidders

INSTRUCTION TO BIDDERS

TABLE OF CONTENTS

1. Preparation of Bid
2. Right to Reject Bids
3. Bidders Responsibility
4. Changes While Bidding
5. Performance and Payment Bonds
6. Conditions Affecting the Work
7. Retention
8. Sales Tax
9. Substitutions and Prior Approvals
10. Value Engineering
11. Unit Prices
12. Labor Rates
13. Permits Fee, Charges, and License
14. Plans and Specifications
15. Construction Limits on Native American Land
16. Geotechnical Report

1. Preparation of Bid

Bids are to be submitted on the Absher/Kitchell J.V. Bid Form and should be accompanied by the completed Bid Scope 5B Structural Steel Installation: Atrium and a Bid Security in the amount of ten percent (10%) of the base bid. Bids shall be emailed, hand delivered, or faxed to the following location:

Absher/Kitchell J.V. (Site Office)
Attn: Tom Kamp & Mark O'Donnell
1000 Shadow Road
Puyallup, WA 98372
Phone: 253.845.9944
Fax: 253.845.1925
bid@absherkitchell.net

2. Right to Reject Bids

Absher/Kitchell J.V. reserves the right to reject any or all bids, to waive informalities and irregularities, and to accept any bid considered advantageous to the Owner. Final acceptance of analyzed bids will be conducted by the Owner.

Bid Forms

Bid Date: May 04, 2017

Bid Package: No. 08 - Framing / Drywall / ACT

To:	Absher/Kitchell J.V. 1000 Shadow Road Puyallup, WA 98372 Phone: 253-845-9944 Fax: 253-845-1925	From:	_____ (Contact Regarding Bid Questions)
		Phone:	_____
		Fax:	_____
		Email:	_____

A. SCOPE OF WORK

We, the undersigned, hereby propose to furnish at our own cost and expense all labor, materials, tools, equipment, facilities, and insurance necessary to fully complete the work itemized below in accordance with Absher/Kitchell J.V.'s Instructions to Bidders for Bid Package No. dated 4/10/2017 and all included documents.

B. ADDENDA

We acknowledge receipt of the following addenda:

Addenda No.:	___	Dated:	_____	Addenda No.:	___	Dated:	_____
Addenda No.:	___	Dated:	_____	Addenda No.:	___	Dated:	_____
Addenda No.:	___	Dated:	_____	Addenda No.:	___	Dated:	_____

C. BID REQUIREMENTS

In submitting this proposal, the undersigned agrees:

1. To hold the bid open for sixty (60) calendar days after date for receipt of bids.
2. To enter into and execute a subcontract on the basis of this bid within five (5) days after notice of award and to furnish insurance certificates and bonds in accordance with the Contract Documents and the Instructions to Bidders. Subcontracts and Contract Purchase Orders are to be written on Absher/Kitchell J.V.'s standard form.
3. To commence and complete the work in accordance with Absher/Kitchell J.V.'s schedule as included in these instructions.

Scope of Work

BID SCOPE 5B STRUCTURAL STEEL INSTALLATION: ATRIUM

Description:

This category of work consists of installing all required Structural Steel and Steel Deck Associated with the Atrium Steel.

Specification Sections

Division 00 – Procurement and Contracting Requirements

Division 01 – General Requirements

051200 – Structural Steel Framing

053100 – Steel Decking

Related Sections:

033000 – Cast in Place Concrete (as applicable)

076200 – Roof Accessories (as applicable)

079200 – Joint Sealants (as applicable)

079513 – Expansion Joint Cover Assemblies (and indicated related sections)

099000 – Painting and Coating (as applicable)

SPECIFIC REQUIREMENTS:

The Subcontractor Shall:

1. Provide all on-site and off-site access traffic control barricades necessary to perform their work in compliance with all City, State, Owner and Absher/Kitchell J.V. requirements, including signage, certified flagger, plating, etc.

_____ **Subcontractor's Initial of Acceptance**

2. Subcontractor to provide all scaffolding, man-lifts, ladders, staging, etc. required for the proper execution of its work. Coordinate locations with Absher-Kitchell Superintendent.

_____ **Subcontractor's Initial of Acceptance**

3. Subcontractor shall coordinate and cooperate with the work of others that interfaces with this scope of work.

_____ **Subcontractor's Initial of Acceptance**

Bid Forms

- Used for Public Work
- Does not allow own T&C
- Often includes
- Alternates and price breakdown

Schedule

- Helps find out season, duration and sequence

2. CONTRACT FORMS

Here are the main documents contained in the Contract Forms

- ▶ Sample agreement
- ▶ Bid bond requirements and sample bid bond
- ▶ Performance / payment bond requirements (labor / materials) and sample performance bond and payment bond
- ▶ Required certifications

3. CONTRACT TERMS & CONDITIONS

▶ Here are two main documents contained in the Contract Terms and Conditions:

- ▶ Subcontract Standard Terms & Conditions
- ▶ Additional or Supplementary Terms & Conditions

▶ These documents give more explanations on the following:

- ▶ Basic rights, responsibilities and relationships of parties
- ▶ Minimum performance requirements of the contractor

3. CONTRACT TERMS & CONDITIONS

▶ Standard Terms & Conditions

1. Changes
2. Insurance
3. Pay App and Stored Material payment
4. Lien Waivers
5. Correspondence and Communication
6. Warranties and Guarantees
7. Project Records
8. Owner - Contractor Agreement
9. Liquidated Damages Provision

3. CONTRACT TERMS & CONDITIONS

▶ Additional or Supplementary Terms & Conditions

II. Safety Requirements

1. General Requirements
2. Subcontractor Code of Conduct
3. Fall Protection
4. Personal Protective Equipment (PPE)
5. Ladders, Stairways and Stilts
6. Scaffolds
7. Personnel Hoists
8. Housekeeping
9. Tools
10. Mobile Equipment
11. Barricades
12. Temporary Electrical
13. Hot Work
14. Flammable/Combustible Materials
15. Public Protection
16. Cranes

3. CONTRACT TERMS & CONDITIONS

► Additional or Supplementary Terms & Conditions

III. Quality Assurance Requirements

1. Subcontractor Quality Control Plan
2. Installation
3. Pre-Assembly / First Work Meeting
4. Mock-Up
5. Assembly Inspections
6. Concealment of Non-Conformances
7. Close Out of Non-Conformances

V. Procedural Requirements

1. Schedule
2. Standard Working Hours
3. Submittal Requirements and Operation & Maintenance Manuals/Data
4. Record Documents
5. Testing
6. Clarification After Award
7. Harmonious Work Clause

3. CONTRACT TERMS & CONDITIONS

► Add'l or Suppl Terms & Conditions

VI. Field and Operational Requirements

1. Layout and Engineering
2. Clean Up
3. Temporary Erosion and Sedimentation Control (TESC) and Storm Water Pollution Prevention Plan (SWPPP)
4. Hoisting and Scaffolding
5. Subcontractor Office, Storage and Security
6. Parking
7. Drinking Water
8. Toilet Facilities
9. Construction Water
10. Temporary Power and Lighting
11. Temporary Telephone and Internet Service
12. Traffic Control
13. Noise Control
14. Temporary Heating and Cooling
15. Jobsite Meetings and Reports
16. Access for Material and Equipment
17. Protection of Work
18. Protection of Existing Conditions
19. Geotechnical Conditions
20. Inspections
21. Time and Material
22. Administration
23. Miscellaneous Requirements
24. Radios and Similar Devices
25. Communication Devices

What is the
primary purpose
of specifications
and drawings in
the bid
documents?



4. SPECIFICATIONS - SECTION ORGANIZATION

- ▶ Specifications are typically technical requirements prepared by the architect to tell the contractor detailed information about the construction that cannot be shown on the drawings.
- ▶ Specifications sections are broken into three sections:
 - ▶ Section 1 - General
 - ▶ Where you get Certification information
 - ▶ References are listed
 - ▶ Quality Control
 - ▶ Submittals

4. SPECIFICATIONS - SECTION ORGANIZATION

- ▶ Sections (continued):
 - ▶ Section 2 - Products
 - ▶ What kind of materials or products
 - ▶ Generic materials or proprietary
 - ▶ Type of finish
 - ▶ Fabrication requirements
 - ▶ Fabrication Quality Control including product tolerances
 - ▶ Section 3 – Execution
 - ▶ Installation requirements
 - ▶ Connections
 - ▶ Field Quality Control including tolerances

4. SPECIFICATIONS - ORGANIZATION

- ▶ The specifications use titles and section numbers for organizing data about construction requirements, products, and activities.
- ▶ MasterFormat is the specifications-writing standard for most commercial building design and construction projects in the US and Canada.
- ▶ MasterFormat is composed of 50 work divisions



5. DRAWINGS

- ▶ Drawings show a graphical representation of the facility that needs to be built
- ▶ Must show *everything* that comprises the facility
- ▶ Generally what is used to do the takeoff, and get quantities for your estimates

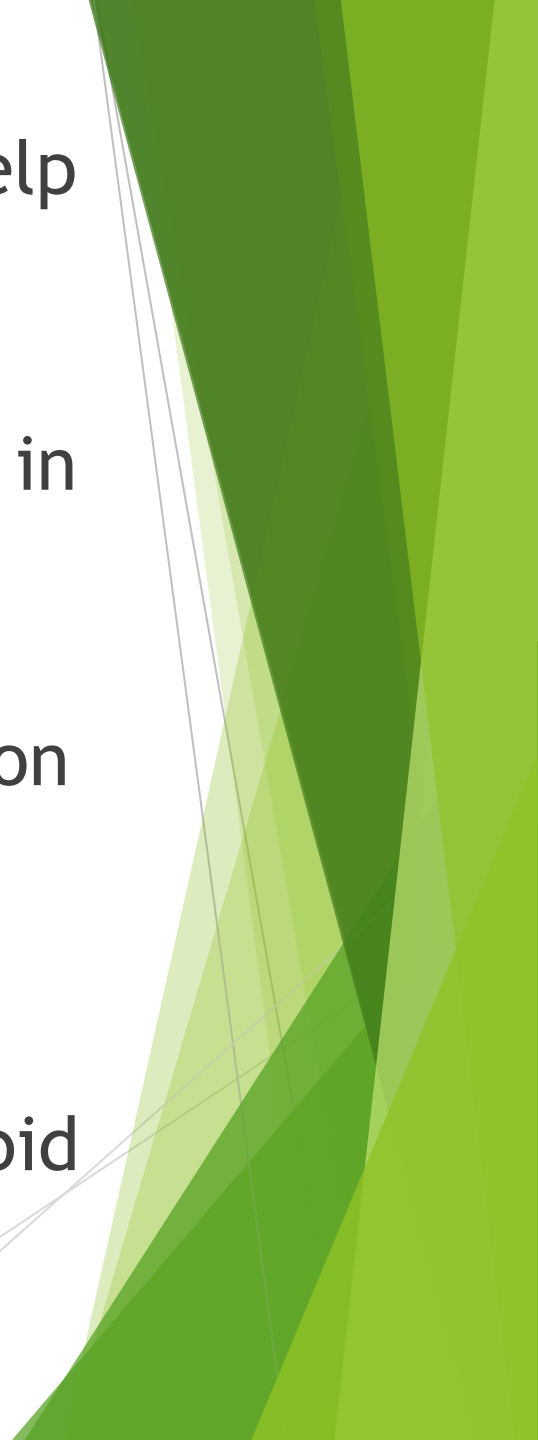


5. DRAWINGS TYPES

- ▶ Civil drawings
 - ▶ Architectural drawings
 - ▶ Structural drawings
 - ▶ Mechanical drawings
 - ▶ Electrical drawings
 - ▶ Plumbing drawings
- ▶ *Why do GCs include all those drawings?*



How to use Bid Documents help us prepare better bids

- ▶ There can be enormous amounts of documentation in bids
 - ▶ It takes time to review and understand what information can impact your bid
 - ▶ The lack of information supplied also tells us a lot about how to prepare our bid
- 

PROS AND CONS OF BID DOCUMENTS

▶ Few Bid Documents

- ▶ At minimum GCs supply drawings for bidding
- ▶ In some cases, the drawings contain certain specifications in the drawings in the notes
- ▶ When less documents are provided, Subcontractors need to fill the blanks in their proposals to mitigate their risks
- ▶ Proposals amounts are based on take off and assumptions - if there are no documents provided listing the conditions, list them in your proposal

PROS AND CONS OF BID DOCUMENTS

- ▶ Few Bid Documents - examples
 - ▶ Access - if no access plans provided, list your access plan
 - ▶ Schedule - if no schedule provided, list rough timing and duration in your proposal. How can you complain about the job being late when you don't state when work is starting
 - ▶ Specifications - if none provided, reference industry standards, general spec sections, codes or tolerances
 - ▶ Materials - if not included, list type and finish

PROS AND CONS OF BID DOCUMENTS

▶ Lots of Bid Documents


- ▶ Takes time to sift through all the information provided
 - ▶ The review time gets faster and faster as you know where to find the information
 - ▶ The better you understand your scope of work, the better you understand the documents that impacts you
- ▶ The exercise for the proposal is to list only the information you used for the purpose of your bid
 - ▶ If you win the job, the contract will try to include all the documents, it will be your job to also exclude the documents you did not use

PROS AND CONS OF BID DOCUMENTS

- ▶ Lots of Bid Documents - examples
 - ▶ Access - important info to extract is where will you unload and store materials
 - ▶ Schedule - check durations of the schedule to see if it matches your hours, to know if you need to add overtime
 - ▶ Specifications - check for tighter tolerances, different materials, finishes than standard industry practice
 - ▶ Drawings - only list the drawings used by your industry for your take off, do not list the others



CONCLUSION




▶ There are many documents, or types of documents that can be included in Bid documents, with the overall purpose of:

- ▶ Informing the Bidder
- ▶ Protecting the General Contractor / Owner

Not every bid will contain the same level of bid documents, some will have many, some will have very few.

The key is to understand the breath of possible bid documents, and their purpose, so that when you bid a project, you know the language to add to your proposal to cover your risks



PRESENTER BIO:

Patrick Ouellet is a Civil Engineer by trade that has worked in the steel industry and around Ironworkers for over 30 years. He is now Owner of a consulting firm that helps subcontractors with all operational aspects of their business, from estimating and bidding, to contract review, documentation and change management, as well as project closeout and construction claims. He is also a principal instructor with IMPACT for estimating and bidding classes across the United States and Canada.

CONTACT INFORMATION

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