

BEST PRACTICES - JOB WALKS

Job walks help contractors, subcontractors and other vendors view the conditions of the work you expect them to perform. They can also inadvertently create an unfair advantage if not done with some planning and structure. Here are some items to consider as you plan your next job walk:

Before you go

Find a good day and time. Try to set job walk on a half day when students are not present. Avoid holidays, or the day before holidays, for any bid actions - job walks or bid openings. Remember, contractors usually work from 7 - 3:30. Mornings are often spent getting workers out to jobs, so you'll likely find that late afternoon job walks are better attended, ending about 3 or 3:30 p.m.

Notify and coordinate with the site. Tell them what you are doing, why, what to expect, and discuss how best to handle sign-in quickly and efficiently. Perhaps the site will allow you to take responsibility for the sign-in sheet and you provide a copy to the front desk before you leave. Know your protocols in advance. Get keys and any special tools to open vaults, utility boxes, etc. It is great to have a site-knowledgeable person join the walk who has all these things ready, but pre-meet to discuss their role as far as answering questions, and what is expected of them.

Who's doing what? Go over ahead of time how the walk will be run, who has what role, who will go first/second, etc. If you look like you know what you are doing, the bidders will be more confident and likely to bid to you.

Plan to take good notes. Assign a person (usually the Architect) to take notes of all questions. You may not want to have the architect or PM to take down all the questions because they may be busy talking. Consider having a 2nd person (Buyer or someone brought by the architect) taking down questions and what was said at the site. You can take similar notes and compare later to help make sure things are covered in any addenda. Follow up to watch that the addendum addresses all items raised at job walk that are not already clear in the bid set.

Bring things you'll need:

- Clipboards with sign-in sheet & extra write-in pages
- Pens - Test them! Fine point, not felt tip
- A hat, walking shoes & water
- The Architect & PM
- Keys, tools, & custodian
- _____ ?

How does it start?

Getting everyone into a group from the start is a good idea. Get a room to sit down, sign in and discuss the project, the bid forms, and take initial questions. If you can't get a room, how about a lunch shelter area? Some place where everyone can hear each other and you have their attention is best.

While sign-in is happening talk about:

- Go over the Bid Form: alternates, unit prices, allowances
- Announce the basis of award (base bid, base plus alternative 1, or whatever you decided when creating the bid documents)
- Prevailing wages apply – tell them that. Also, let them know if there is a Project Labor Agreement (or equivalent) for this project
- Tell them if full DVBE outreach is required or not on this job
- Tell them if you have a stormwater management plan (SWPPP) and where it is in the bid documents or if one is not applicable what they should do
- Go over the Special Conditions and a Site Map – generally discuss the anything special about this job and where they will be coming in from/laydown area, utilities, fencing, etc.
- Discuss what comes in with bid, and what forms can follow
- Announce that the answers provided at the Job Walk are only official based on the plans and specifications, or written addenda. No bids shall rely solely on what is said at the job walk.

MORE ABOUT BEST PRACTICES...

Let's walk!

Keep everyone together. Yes, some folks don't need to see the electrical point of connection, but crosstalk and addenda management trump convenience. Consider keeping specialty items to the end and letting people leave as you narrow down focus. Keep them informed of your plan and respect their time. Additionally, these folks are not fingerprint verified, so when on an active campus they need to stay with you!

No private conversations. Don't allow district folk, nor folks like the PM or Architect to hold private conversations with people they know well before, during or after. If it looks like a private conversation, it is one! This behavior can accidentally provide information to one party at the exclusion of another, or look like it did. Avoid the perception of favoritism.

You may want to avoid answering questions onsite. It may be best to jot questions down and answer them via addendum when you can be sure the answer is correct. Ask for them to be put in writing after the walk, too. The walk is for viewing conditions, taking measurements, and so forth. It need not be a time for RFI responses on the spot. If questions are asked and answered, MAKE SURE that the question is already exactly answered in the bid documents. If not, MAKE SURE to address them in addenda.

Late Arrivals? If someone is late to the job walk, you need to know what your District's view on this in advance is to see if that is okay. Mandatory or non-mandatory, if they show up they have met the requirement. It is still their legal responsibility to familiarize themselves with the job and take the risk when submitting a bid. Consider letting them sign in and move on with the walk.



Afterward

Post the job walk attendee list with any known planholders added on your website - update it weekly as needed. Subcontractors use this to get their bids to the general contractors, and general contractors use it to obtain bids from interested subcontractors. If prequalification is required, make sure prequalified lists are available and updated regularly up to 24 hours before the bid.

Get the addenda out as quickly as possible. What you know – move to the bidders. An additional addendum or 2 is better than holding off until you have one huge one and issue it too close to the bid date to be digested properly. Just because it's legal doesn't mean it's best practice!

Bid openings are best done in the afternoon. 2:00 p.m. is typical. This allows the last-minute bid effort to get the best price possible to occur in the morning, and gets the bid runner out and ready, avoiding heavy traffic, and back to office on the same day. If using online bidding, most of this logic still applies.

*The best preparation for
good work tomorrow is to
do good work today.*

– Elbert Hubbard