

A photograph of a business meeting. In the foreground, several hands are clasped together in a gesture of agreement or teamwork. Below the hands, a tablet and a document with various charts and graphs are visible on a table. The background is softly blurred, showing a person sitting at a desk. The overall lighting is warm and professional.

# Information Needed to Prepare Construction Bids

## Some things you need to know before you start filling out the bid advertisement, front end bid documents and special conditions

Ever wonder why creating the bid advertisement, front end, general and special conditions for a bid takes so long? Probably because when you try to do it you don't have what you need at your fingertips to get it done!

Some of these things can be entered into a template and saved so you don't start from scratch. If you do that, please make sure not to put project-specific items in your template! Also, if you take your template and edit it – removing something, adding something, etc. for a specific project, be VERY careful ever using that version on a future project (unless you kept a redline so you know for sure what you edited!)

The list in this guide should be edited to suit your front end, general and special conditions. It is a good start to a cool, new “Bid Project Intake Form” that you can create and use to have folks who know these answers provide them so the creation of the bid document can go smoothly. If you use your lawyer, an outside project manager, or your architect to do this, they need all this information, too!



### Note about this guide...

Information is generally divided by the primary location an item is typically needed in, but many times a particular item is needed in two or more places. Work your bid template so that you only say something ONCE, not counting the ad for bid, to avoid mistakes and having a hard time correcting all instances when something changes.

## PROJECT INFO

- › The proper **name of your District** as used for contracts.
- › The **County** your District is in.
- › The **district's mailing address** for notices, not for receipt of bids.
- › The **project name** which usually matches what is on the plans, but not always.
- › The **bid number** that bidders and other interested parties can use to quickly communicate about the bid and differentiate one bid from another. You may try the 2-digit year and start with 1 – 22001, 22002, and then start at one again when you go to 2023.
- › A **short description of the project** which is typically a short 2 or 3 sentence paragraph with the intent to get the right type of bidders and subs engaged in bidding the job.
- › The **project estimate** which is usually rounded to the nearest thousand and often stated as a range, i.e. “estimated between \$400k and 500k”
- › The **license type** (A, B, or specialty C-XX) required to bid this job
- › The **location where the bid documents** and addenda can be obtained
- › The **date when your bid documents will be available**. Sometimes you need to advertise for bid before the documents are ready, so this date is good to know and provide to your bidders. If you do this make sure you give enough time for the contractors to digest and get quotes from the subs before the bid date.
- › The **issue date** which is the date you plan to issue the bid out.
- › The number of **bid hold days** which is the number of days between the bid and the anticipated board date during which the bidder must hold his bid valid. Note: the longer the hold period the more guessing the bidder will have to do because it often means delay in locking down prices with the subcontractors and suppliers. Commonly this is 30 days, but your district may vary.

### Best Practice Hint



Start with your template bid documents every time!

## Bid Form Info

Will the bid form include any **Alternates** (optional bid pricing broken out)? If yes, will they be additive or deductive? Note: The architect or someone needs to make sure that the full scope and impact of an alternate is clear. This this may include adding annotations on plans, specifications, and including a Specification Section for them. Note: Additive alternates are generally preferred so the bidder knows the minimum scope they will be providing as they decide whether to bid at all, and for other reasons.

Will the bid form include any **Unit Prices**? If yes, a detailed list is required that provides sufficient detailed description and quantities to facilitate pricing and later use. If bid is for unknown scope and unknown sites for a period of time, the district must include the time period for which the unit prices will be valid and the area/sites for which the unit prices may be used.

Will the district be including any **Allowances** in the award? If yes, the architect or someone needs to make sure that the intent and use of each allowance is sufficiently detailed for legal purposes and let the bidder know how they will be invoked. Perhaps consider stating that uses of Allowances will follow the same process in the General Conditions as Change Orders.

The **Method of Determination of Low bidder**. Options in CA law (CA Public Contract Code section 20103.8) are: Base Bid Only, Base Bid Plus Alts, Award Up to Amount, and Blind Bid). If you fail to state the law assumes base bid only.

## Bid Management Info

**Advertisement Date 1 and Date 2** because for public works over the \$15k standard or \$200k CUPCCAA limits, 2 ads each week for 2 weeks +1 day to bid minimum are required.

What **newspaper of General Circulation** will the ads be placed in? Note: If you are not sure call the paper. They know if they are or are not one. If your area doesn't have one, seek legal counsel because there are options.

**Bid Questions Name:** Who will be the sole person during the bid that bidders may contact? Note: Providing only an email address can be sufficient.

**Bid Questions Email:** What email will be used for questions during the bid period?

**Final Questions Due by:** What is the final date during the bid period for asking questions and they will be answered. After this date the district may or may not answer any further questions, so typically this is at minimum 72 hours prior to bid.



### Best Practice Hint

Have you thought of using mail merge to fill out most of this stuff? It works!

## Prequalification Info

If prequalification applies you'll need to provide the **minimum prequalification** rate the bidder must have to bid this project. It need not match the estimate. It's the district's decision and is often a bit lower than the lower end of the estimate so you don't hold good contractors back in case the estimate isn't perfect.

The **link or location of where a contractor can get the form or do the process to prequalify**.

**Prequalified Primes List location:** The place, usually online, where the prequalified prime contractors list is posted

**Prequalified Subcontract List location:** The place, usually online, where the prequalified subcontractors list (when applicable) is posted. Typically, this list is only used for Mechanical/Electrical/Plumbing subs, a.k.a. MEP, when State funding is anticipated.

## Job Walk Info

The **type of job walk** you will hold, if any. Mandatory or non-mandatory, or none. There are pros and cons of each.

The **job walk date**. Note: avoid Mondays and Fridays because those are often taken off by contractors, or are holiday adjacent. Mondays are hard for everyone. Contractors are getting jobs moving, etc. Avoid the last 2 weeks of December and the first week of January, too.

The **job walk time**. Note: You'll get better coverage of bidders and subcontractors if you do your job walk just after school lets out. Give a bit of time for the rush of student pickups to pass. If you have half-days, those work well, too. Early mornings are usually needed by contractors to get things started at existing job sites, so no earlier than 9, and be done by 4:30 at the latest.

The **job walk location**/address which is usually the project site address. Note: If the walk will take folks to multiple sites, you can simply state the first site and mention that the walk will continue to the other involved sites so they know what to expect.

**Where to meet for the job walk**. For example: front office, left side parking lot, etc.

## Bid Submission Info

The **bid submission method** for this bid. Many Districts now have the ability to receive bids electronically, so be sure to let bidders know and use the correct language in all appropriate places in the bid documents.

If paper bid, then the **location/address where the bid is to be received**.

The bid date. Note: avoid Mondays and Fridays – those are often taken off or are holiday adjacent. Avoid the last 2 weeks of December and the first week of January, too.

The **bid due/cutoff time**. Note: Avoid before 9 and after 3 if you want the best coverage. Be nice and avoid lunch, too. Contractors need time to get ready for the bid, and they usually end their day at 3:30 or 4.

## Public Bid Opening Info

The **way you are going to allow the public to observe the public bid opening**. Will it be in person, online, or online with an in-person option?

The public **bid opening time**. This may be a little after the bid due time, but must be timely following the close of bids, and must be public.

The public **bid opening location** address or online link.



### Best Practice Hint

Special Conditions are edited for the project every time!

{But you can have a template that woks for you most of the time!}

## Special Conditions Info

**Federal Funds?** If a Federal fund source will be used include any specific additional requirements such as compliance with the Davis/Bacon Act, Buy American Bill, or other special concerns here.

Will there be **Sole Source Products** on this project? If yes, list them and verify board authorization for sole source is in place already.

Will there be any **special requirements to provide for Substitution Requests** in a different manner than already allowed for in the General Conditions and Information for Bidders? If yes, revise them here.

Hopefully the General Conditions has the minimum required insurance requirements. If this project needs more or additional types of insurance, but that here.

Does this project have a Weather Days set aside? If yes, put that here and make sure the General Conditions says when and how and who can use them. If the GCs don't, put that here, too.

Will the district go with the Contractor's selection of **Fingerprinting** compliance

method on the fingerprint form, or does the district want to force specific method(s)? If the district wants to dictate, say so here.

Are there any **Permit Fees** involved in this project that the Contractor doesn't need to pay? Hopefully your General Conditions call for the Contractor to cover all permit fees. If the district is paying for any (like the stormwater permit fee likely already paid prior to finalization of the bid documents), say so here. That way you don't pay twice!

Will you allow the contractor to connect to any **onsite utilities**? If yes (or no) make that clear here.

Are there any specific **Safety/Security/Storage/Ingress-Egress/Fencing** requirements on this project? If yes, say so, and provide a site map as applicable to be clear about entrance/storage/fencing needs at least for day 1 of the project here. If you want construction vests mandatory, say so. If you require the contractor to provide badges, or if you require all workers to go to the district for badging, let them know. All these types of things are material to the price and conditions of this bid.

**Parking and deliveries:** Are there any parking restrictions on or around the site? Do you want to limit deliveries to non-student arrival and departure times? Say so here.

Does this project require an **on-site field office trailer for the DSA inspector** or someone else? If yes, put all detailed requirements here or in a specification.

Will they at any point during the job be working on an active site? If yes discuss and provide the **School Schedule** and any constraints here.

Is a **Disabled Veteran Business Enterprise (DVBE)** certification and good faith effort required on this bid, or is your district goal and the subcontractors list sufficient. Let them know here if you haven't already said so in the Information for Bidders. It's required if the project is or may be State funded.

What are the **Liquidated Damages** on this project? If the General Conditions has a minimum already and it is not enough for this job, put the LDs that are needed here.

Is the project **phased**? If yes, provide a specification or you can put information here about what needs to be done by when and associated Liquidated Damages for each phase.

Verify **Stormwater Compliance** here – if there is a SWPPP make sure it is issued and state if the Contractor must provide the Qualified Stormwater Practitioner on site. If there is not, provide details on what level of stormwater compliance is required without one.

Do you require the Contractor to use **specific software**? If yes, do you need to invoke that on this project? If yes, say so here.

Does your district have **other special things** it always wants on a project not otherwise handled in the General Conditions or Specifications/Plans? Put that here!

**Reference Documents** should be provided and are only for reference, not for bid. This is a best practice and may be a new concept. Discuss this with legal counsel, because there are court cases about why this is a good thing to do. If not in the Special Conditions, then this section may be a Specification.

