

Checklist for an Informal Project Pre-Bid Conference with Contractors

I. Pre-Bid Conference Agenda

Open Meeting	Construction Management PM
• Distribute plans and specifications	
Introductions	Construction Management PM
• Pass around sign-in sheet	
Present Overall Project Scope of Work	Consultant Designer
Discuss Individual Plan Sheets and Details	Consultant Designer
Discuss General Notes and General Instruction Sheets	Construction Management PM
Conduct Project Walk-Through PM	Consultant Designer / NC State Design
Discuss Attached List of Mandatory Topics	Consultant Designer
Discuss bid sheet, bid breakdowns, and bid alternates	Construction Management PM
Contractor Questions and Concerns	Contractors
Discuss Addendums	Construction Management PM
Announce Bid Date and Time	Construction Management PM
Close Meeting	Construction Management PM

II. Individual Responsibilities

(If project is designed by NC State staff, then Design PM assumes responsibilities of Consultant Designer)

Consultant Designer

PRIOR to the conference:

1. Review agenda for items you will cover, and get answers, either from the NC State design project manager, or the building liaison.
2. With at least 2-3 vendors: check price, availability, and lead-time on materials specified.
3. Determine if “quick shipping” is available, it’s cost, and whether a “quick ship” quote is required.
4. If NC State provides materials, determine anticipated delivery dates.
5. Visit the site and review that plans reflect current building conditions.
6. Prepare for meeting by reviewing plans and the agenda.
7. Fill out and make 8 copies of the Informal Project Bid Form by line items, providing line item descriptions on a separate page. The Bid Form is available as an Excel spreadsheet.

AFTER the conference:

1. Complete attached “**Topics Discussed at the Pre-Bid Conference**” listing, with any clarification notes (handwritten is OK), and provide a copy of the document to the construction management PM for the project file.
2. Answer contractor questions on bid documents.
3. Prepare addendum(s), review with Design and CM Project Managers, then distribute to Contractors.

NC State Design Project Manager

PRIOR to the conference:

1. Coordinate with NC State Transportation for Staging Area Agreement.
2. Ensure that consultant designer has this checklist.
3. Doublecheck anticipated project schedule with construction management PM.
4. Doublecheck material lead times with consultant designer.

AFTER the conference:

1. Answer contractor questions on bid documents.

NC State Construction Management Project Manager

PRIOR to the conference:

1. Schedule pre-bid conference with:
Contractors, NC State Design PM, Consultant Designer, Building Liaison, Department Representative, and the Campus ADA coordinator (if project is ADA or affects walkways or entrances).
2. Pre-determine an approximate project schedule.
3. Educate Owner/Client on expectations for the project.

AFTER the conference:

1. Coordinate bid activities and troubleshoot any contractor problems.

2. Answer contractor questions on bid documents.

III. Topics Discussed at the Pre-Bid Conference

Project Description: _____

Date of Pre-Bid Conference: _____

Note: The Consultant Designer shall jointly lead discussion about the topics listed below with the Design PM and the Construction Management PM. This form will be filled-out as discussion ensues, and shall be placed in the project file for a future reference of items discussed.

1. If a topic is not discussed because it is "Not Applicable," signify with "NA" next to the topic. Otherwise, signify that discussion occurred by placing a checkmark "✓" next to an item.
2. If more detailed discussion occurs, such as discussing exact dates and times, annotate details discussed next to the respective items.
3. Staple attendance sheet to this list.

Bid Date and Time

Date: _____

Time: _____ PM

FedEx and Mailed Bids MUST clearly denote project bid information on the outer envelope

Contractor Access during bid preparation

_____ How will Contractor access site during bid prep? Who to call?

_____ Departmental Point of contact, telephone number, email

_____ Building Liaison, telephone number, email

Anticipated Project Schedule

Start Date _____

End Date _____

Discuss Lead Times for Materials, and how this affects the Schedule

_____ Materials requiring ordering and delivery

1.

2.

3.

_____ NC State-provided materials and delivery times

_____ Vendors queried

_____ Normal delivery time

_____ "Quick ship" quotes

_____ Shop Drawing preparation and Review times?

Discuss Constraints on the anticipated Project Schedule

- Establish any Calendar Constraints on Start and End of Construction
- Regularly Scheduled Events (exams, graduation, classes, etc)
- Upcoming Irregular Events (Special Olympics, seminars, etc)
- Establish any Daily Work Schedule Constraints
 - Classroom Schedules
 - Quiet hours
- What are the Resulting SPECIFIC allowable DAILY work hours for contractor?

Anticipated Project Phasing

- Discuss as appropriate
- Does the project schedule reflect phasing?

Construction Impacts to Owner during Construction

Discuss planning, mitigation, and notification for the following possible impacts

- Noise
- Vibration
- Dust
- Odor
- Light
- Security
- Temperature and Humidity (HVAC) changes
- Utility interruptions
 - Water
 - Electric
 - HVAC
 - Steam
 - Fire Alarm
 - Sprinkler System
 - Detection System
 - Gas
 - Telecommunications
 - Fumehoods and/or Lab Air (compressed)
 - Distilled Water

- _____ REQUIRED notification for Utility interruptions
- Primary (total building power) – 12 working days
- Secondary power feeders – 7 working days
- Cold/Hot water interruption – 7 working days
- AC/Heat Interruption – 7 working days
- Fire Alarm Disconnect/Testing – 5 working days
- Distilled Water Interruption – 7 working days
- Steam Interruption – 7 working days
- Gas Interruption – 7 working days
- Lab Air Interruption – 7 working days
- Sanitary/Storm Sewer – 5 working days
- ComTech Data – 5 working days

Owner/Customer Proximity and Considerations

- _____ Discuss who is in proximity to project and their activity.
- _____ Any special Owner considerations based upon anticipated impacts?

Excavations on Campus

- _____ Must contact ULOCO, NO-CUTS, or other utility locating service to have utilities Marked prior to breaking ground.
- _____ Trench Safety per OSHA standards

Temporary Contractor Use of Utilities and Facilities

- _____ Water
- _____ Electric
- _____ Telephone
- _____ Restrooms
- _____ Drinking water

Establish Parameters for Normal Contractor Operations

- _____ Contractor parking locations
- _____ Material deliveries: restrictions on time & location
- _____ Allowable staging areas
- _____ Allowable material storage areas
- _____ Any DO NOT DISTURB areas?

Permits: NC State and others (discuss lead-time for notification, and cost)

- _____ Hotwork
- _____ Fire Alarm
- _____ Environmental Permits (streams, wetlands, open burning, air quality)
- _____ Parking and Staging Area
- _____ Permits to be paid by Contractor or NC State?

Miscellaneous Items

- Any danger of invalidating warranties on any recently installed components?
- Any anticipated change orders?
- Specialized equipment possibly necessary?
 - 1.
 - 2.
- Who is responsible for removing existing furniture and equipment?
- Who is responsible for replacing furniture and equipment?
- Who will coordinate project schedule with the Housekeeping Department?
- Did NC State Telecommunications review the project? Any mods/impact to telecomm drops, etc?

Environmental Considerations

- Weather Delays
 - Adverse weather policy
- Asbestos
 - NC State University Survey
 - Any project-related asbestos removal contracts?

As-Built Drawings

- How and when to submit to CM PM
- # of copies

Warranty

- NC State-provided materials
- Contractor-provided materials
- Effect of project on warranties of existing facilities

Contractor Payment

- Full Payment only, or partial payments considered?
- Liquidated Damages in effect?

Contractor Qualifications

- License Limit: Must be above \$ _____
- Project-Specific Liability Insurance Certificate to be provided to CM PM.
 - Minimum Liability coverage is.....
- Workman’s Compensation: Minimum coverage is.....
- Automobile Insurance: Minimum coverage is.....

Safety

- Safety considerations of the Client/Department
- Student safety
- Faculty/Staff safety
- Safety Plan required
- Weekly Safety Meetings

Contractor Decorum and Conduct

_____ Shirts required

_____ No profanity or lewd/objectable behavior

_____ Minimal disruption to offices and classrooms: Advance notice required