Checklist for an Informal Project Pre-Bid Conference with Contractors

I. Pre-Bid Conference Agenda

Open Meeting
  • Distribute plans and specifications  Construction Management PM

Introductions
  • Pass around sign-in sheet  Construction Management PM

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  Consultant Designer / NC State Design PM

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/objectionable behavior**
- **Minimal disruption to offices and classrooms: Advance notice required**