
Walk-Throughs and Clarifications

No project will succeed if the contractor cannot easily interpret what the design professional intends. Designers can greatly assist contractors to better understand the project and the work required to complete the project if they hold pre-bid conferences or walk-throughs (preferably at the proposed new project location). It is here that the design professional and the potential bidders meet and discuss issues or clarify questions pertaining to the project.

The design professional should be very conscious of the questions asked and provide not only oral replies but written ones as well. All questions and responses given during the walk-through should be forwarded in writing to all in attendance. This practice alleviates any misinterpretations about what was said during the site visits and again allows for written documentation of what is required for a comprehensive submission. The same should be done for all questions or clarifications asked pertaining to the project throughout the bid process.

Bid Opening/Compliance

The design professional should establish a formalized procedure for the receipt and opening of bid materials. Regardless of project type, bids should be opened in the presence of the owner or a designated owner's representative. Before the submissions are evaluated, the bids should be recorded and submitted to the project file as received for future reference.

Further, all submissions should be governed by simple guidelines for compliance, in an effort to ensure the timely receipt of bids, format of bid content, and how bids are received. Designers should consider the standard requirements:

- *Proposal cost information should be completed in the exact format provided in the RFP.*
- *Proposals should be submitted on company letterhead and signed by an authorized representative of the general contractor (GC).*
- *Telephone, telegraphic, electronic submissions, or unsealed proposals should not be accepted.*
- *Ask for key project staff (GCs) to be assigned to the project.*
- *Establish a deadline for submissions. Be detailed.*

Evaluation of Bids

Bid evaluation requires the time and expertise of someone familiar with the project and the construction process. It is important for this individual to have the authority to address the corresponding contractors with questions for the purpose of determining whether their bid submissions are complete. As a rule of thumb, the evaluation process requires that the responsible person prepare a spreadsheet to compare the line-item costs of each bidder.

Figure 35-2 is an example of the level of information such a spreadsheet may entail.

This process of bid review is also called “leveling” and is a critical step in understanding the contractor’s view as to the value of the job. It allows the design team to see how the bidders have thought through what is really required to construct the project. Pay very close attention to any list of exclusions, alternates, and substitutions submitted in their response. The leveling process should address any exceptions to the RFP:

- *Omitted items*
- *Clarified items*
- *Missing items*
- *Conflicting terms and conditions*

In each case, the bid leveling review should result in removing the exceptional item, or placing an add/deduct cost next to the item. In this manner, all bids are equally compared.

Award of Contract

The design professional should always send a letter to the unsuccessful bidders to thank them for their interest in the project. Similarly, it is customary to provide the successful bidder some form of written notification to officially inform them that their bid has been accepted before the signed agreements are returned. This letter should also include any information regarding the project kick-off meeting, start dates, and any forms or additional information required before construction commences.