


## Bidding, Scopes and Specifications



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## What do you want to get out of today's training?



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## Today's Agenda:

- Creating a Scope of Work
- Work Specifications
- The RFP Process
- Comparing Bids

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With appropriate tools, talent and time,  
some work can be handled  
“in-house”.



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Other times...  
you are going to need some help.



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It all starts with the “Scope of Work”

Question #1 –

What do we want?

You have to know the goal in order to achieve it.

Question #2 –

Should we do it “in-house”?

Know the resources and time you can spare from Operations.

Question #3 –

How can we describe it in a “Scope of Work”?

Clearly communicate the goals. What. Where. When.

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## What should be included in a Scope of Work?

- The "Intent" of the Work
- Location and Quantity
- Deadlines and Milestones
- Specific Tasks



If the Work will be bid out to various contractors, you may design the Scope of Work to also serve as the Contractor's Bid Form.

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## Example:

Building # and Address: "Replace Roofing"

- Is flashing and ice/water shield included?
- What type of roofing?
- How large is the area?
- Begin and complete by when?
- Is the contractor to provide all materials, clean up and disposal?

State the "Intent" of the Work – Spell out the problem you are trying to solve:

"...in order to prevent water infiltration into the building."

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## What are Specifications?

- "How" the Work will be performed
- Parameters
- Materials – Quality, Brand
- Specific Criteria



Make certain the Specifications come from an expert.

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### Example:

Specify...

- Exact products (size, color, model)
- Install conditions (temperature, humidity)
- Fastening/Application methods
- Safety criteria

Always include, "...per Manufacturer Specifications."

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### Where to get good Specifications

- **Engineers** – High cost, but arguably the "experts" in their field. Shared accountability.
- **Architects** – Also at a high cost, but again experts in many fields. Typically shared accountability.
- **AIA** – Membership or fees may be required. Good "boiler-plate" specifications. Limited accountability.

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### Where to get good Specifications

- **Contractors** – Often free, but be aware of what you are getting. Many contractors are self-proclaimed "experts" but might leave out important information. Contractor specifications may be limited by their suppliers.
- **Manufacturers** – Most often free and readily available, but manufacturers will only specify how to install or apply their specific product. Always an important part, but not always the whole job.

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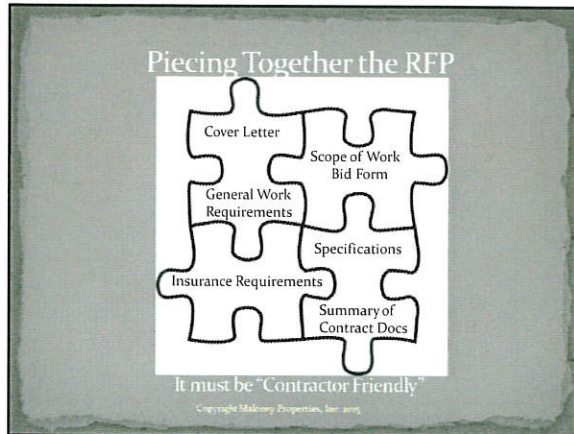
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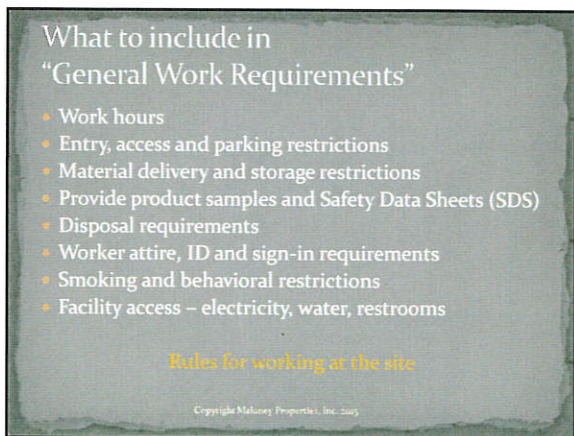
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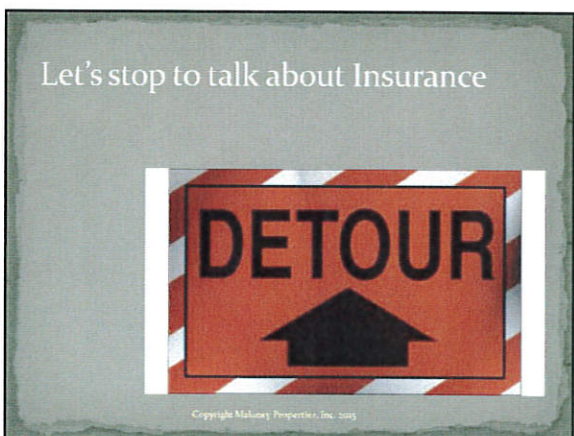
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## What coverage are you looking for?

- General Liability – “Per Occurrence”
- Umbrella Liability or Excess Liability
- Worker’s Compensation (per limits of state where work is taking place)
- Automobile Coverage
- Do you require “Additional Insured” language?

*Let contractors know what your insurance requirements are BEFORE they bid the work.*

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## Your RFP is the “First Impression”

How will this first impression affect the price?

How will it affect the way the Contractor approaches the work at your property?



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## Do you need a Pre-Bid Walk-Through?

Contractors will need to see the work they are bidding. How elaborate the walk-through should be depends on the complexity of the Scope.

For engineered scopes or complex projects, a pre-bid walk-through with all Contractors will typically be conducted by the Architect or Engineer.

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## Who might need to be involved?

- Architect
- Engineer
- Construction Manager / Owner's Representative



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Contractors and Vendors are people.  
A personal touch goes a long way.

Take time to place the calls...

"Are you interested in this work?"

"Did you receive the RFP?"

"Will we see you at the walk-through?"

"Just reminding you about the bid due-date."

"Thank you for your bid."



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## Remember...It's a Partnership!

Contractors and Vendors take time out of their business to view our projects, provide estimates and meet the various criteria we require.

But after all this effort, only one can be awarded the Scope...and we need the others for future work and future bids.



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## Receiving the Bids...

### YES

- Your Bid Form
- On Time
- With References
- With Evidence of Insurance

### No

- Not by phone
- Not in only their format

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## Bid Matrix – A Must!

### Contractor Bid Matrix - Concrete

PROPERTY: Beautiful Gardens

SCOPE / LOCATION: Concrete Pads and Walkways

Name of Firm:	ABCD	Concrete R Us	Stone Masonry	Good Guys
Contact Name:	Shawn	Paul	Paul	Bill
Contact Phone:	339-555-9876	617-555-9876	508-555-9876	978-555-9876
E-Mail:				

Date Received:

Pads	\$ 7,322.50	\$ 7,740.00	\$ 6,966.00	\$ 2,902.50
Walkways	\$ 42,862.50	\$ 55,227.00	\$ 39,435.00	\$ 29,576.25
Fire Lane	\$ 66,675.00	\$ 89,040.00	\$ 36,960.00	\$ 42,000.00
Pavers	\$ 2,250.00	\$ 3,750.00	\$ 2,250.00	\$ 1,200.00
<b>TOTAL FOR WHOLE:</b>	<b>\$ 119,110.00</b>	<b>\$ 155,757.00</b>	<b>\$ 85,611.00</b>	<b>\$ 75,678.75</b>
Add - General Conditions	\$ 32,375.00	\$ -	\$ -	\$ -
<b>GRAND TOTAL:</b>	<b>\$ 151,485.00</b>	<b>\$ 155,757.00</b>	<b>\$ 85,611.00</b>	<b>\$ 75,678.75</b>
Add Alternate - Carpentry	\$ 3,500.00	N/A	N/A	N/A

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Don't forget...



...Contractors know each other.

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## Project Award

You have to convey the good news to the selected Contractor and the bad news to the rest.

Make the calls – Future relations depend on it.

The Contractors deserve the same respect we expect from them.

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For your convenience, we are providing the following:

- PowerPoint Hand-Out
- Sample Scope of Work (Turnover Painting)
- Sample Scope of Work (Turnover Cleaning)
- Sample AIA Specifications (Painting)
- Sample General Work Requirements

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## Questions?



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