

Chapter 7 – Bid Phase Guidelines

7.4 PRE-BID SITE VISITS

GENERAL

1. A Pre-bid Site Visit provides potential bidders with an opportunity to view the project site and become familiar with existing conditions. Most often, bidder's access to the site will be restricted to this specified time period to minimize facility disruptions. Bidders are NOT REQUIRED to attend in order to bid a project.
2. Pre-bid Site Visits are scheduled for most projects and are conducted by the Division of Construction staff.
3. The requirement for the PM and Consultant/Designer to attend the Pre-bid Site Visit is by mutual agreement between the BUL and Regional Supervisor. A request for a Consultant/Designer to attend the Pre-bid Site Visit is considered an optional service.
4. Consultant/Designer attendance is beneficial to the project to be able to listen to bidder questions. Bidders are encouraged to fill out the Bidder's Question Form to get a question resolved by addendum. An alternative method for Consultant/Designers to hear bidder concerns and questions would be via a teleconference call (conducted by field staff) after the bidder Pre-bid Site Visit.
5. During a Pre-bid Site Visit, factual information shall not be exchanged and no interpretations of the contract documents shall be made. Such information includes responses to bidder questions regarding reference to specific specification sections and drawing plans, details and notes clearly identified on the contract documents. **Conflicts and items that are not clearly identified in the documents shall only be answered by written addendum.** Without the benefit of a written addendum, verbal answers are not enforceable and are subject to the interpretation of those listening. Furthermore, verbal answers are not made available to all potential bidders not in attendance at the Pre-bid Site Visit.
6. Pre-bid site visits on rare occasions may be made mandatory for bidders on projects where specific expectations or requirements cannot be readily described in the drawings and specifications. The Consultant/Designer would be required to attend such a pre-bid site visit. Examples of projects that have utilized mandatory pre-bid site visits include:
 - a. A stone cleaning project at the New York State Capitol where multiple sample cleanings were performed during design development and specific samples were identified as the standard for acceptable cleanliness.
 - b. A tire dump remediation project where the specified shredded tire product was required to meet a minimum cleanliness standard. Acceptable and unacceptable shred samples were made available for inspection at the pre-



bid site visit. Bidders were informed that these shred samples would be used throughout the project to determine the acceptability of all shred produced. Use of a mandatory pre-bid site visit requires approval by the BUL, Client Agency and Division of Construction because it potentially limits competition. Aggressive project marketing would be required. Justification for the use of a mandatory pre-bid site visit must be included in the project record.

PRE-BID CONFERENCE

Although rarely used, a more formal Pre-bid Conference may be recommended for large multi-trade contracts and high profile projects to familiarize all bidders with requirements of the local facility and to listen to questions and concerns raised by those present.

When a project has a Pre-bid Conference, the Project Manual cover page will include this notice. The Advertisement for Bids will also include the location, date and time for the meeting.

The Area Supervisor or the OGS Team Leader shall chair the meeting. An attendance sheet should be used to have a record of those who attended the meeting.

At this meeting, no interpretations of the Contract Documents shall be made. Responses to drawing and specification questions should only be those that can be made by reference to specific Specification sections and Drawing plans, sections, details, and notes. Conflicts and items that are not clear in the documents can only be answered by addendum. Without the benefit of an addendum, verbal answers are subject to the interpretation of those listening and are not available to anyone not in attendance at the meeting.

State attendees should include the OGS Team Leader, Project Manager and other designated Consultant/Designers, the Engineer-In-Charge, area construction and mechanical supervisors, facility representatives, and representative(s) from the Office of Contract Administration. Others that may be asked to attend, dependent upon the project, are representation from Contract Compliance, other State agencies (such as the Department of Labor), and local municipalities. Consultant/Designers may be requested to attend by the OGS Team Leader as an optional service.

The following subjects should be discussed at the Pre-bid Conference:

1. Bid security in the form of bid bonds or certified checks.
2. Sales and Use taxes.
3. Permits: Generic statements that there are no local building permits required to be obtained by the contractors, except for those required for specific items such as roadway permits and local tie-ins to public utilities.
4. Date, time, location for receipt of bids and OGS security protocols / delays.
5. Forms that must be included with the bids.
6. Specific rules of the local facility that require bidder compliance. These rules must be included in the documents. If not included, an addendum will need to be issued that includes these rules.
7. Special project specific requirements in the documents.
8. Questions raised by the potential bidders present at the meeting.
9. Tour of the project site after the meeting
10. The following agenda is recommended:
 - a) Introduction of representatives from the State
 - b) Project Overview (Consultant/Designer)
 - c) Bidding requirements
 - d) M/WBE and EEO requirements
 - e) Security regulations at the facility
 - f) Specific project requirements
 - g) Questions from the bidders in attendance
 - h) Tour of the site



Revision History:

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