

# GUIDE FOR ORGANIZING AND COMPLETING THE PROJECT MANUAL

## **Minor Construction Projects Between \$10,000 and \$100,000.**

This Guide describes the requirements for organizing and completing the OSE documents for the typical construction project between \$10,000 and \$100,000. The Project Manual should include the following in the order shown:

### **A. Table of Contents – Minor Construction**

1. Use the appropriate OSE formatted Table of Contents – Minor Construction found in Appendix B.3. If the project will most probably be below \$50K, you can omit the bond forms (SE-355 & SE-357). Complete all the fillable sections.
2. Follow the instructions in *italics* to incorporate the technical specifications.

### **B. SE-311 – Invitation for Minor Construction Quotes**

1. All sections of the SE-311 and SE-311, Page 2 must be completed with appropriate wording and boxes checked.
2. For projects exceeding Agency’s Construction Contract Award Certification/Authority:
  - a. Submit a copy of the completed SE-311 to the OSE Project Manager in MS Word format.
  - b. Submit a copy of the completed SE-311, Page 2, signed and dated by the Agency, to the OSE Project Manager.
  - c. Attach a copy of all permits and approvals listed in Section 3 of Page 2.
  - d. OSE Project Manager will review and send approved copy of SE-311 to SCBO (if requested) and the Agency.
  - e. The signed copy of the SE-311 MUST be included in the Project Documents.
3. For projects within Agency’s Construction Contract Award Certification/Authority:
  - a. Send the SE-311 along with other project documents to contractors as the written request for quotes.
  - b. If advertising in SCBO, a link to the SE-311 must be provided in the Description of Project when creating the advertisement online.
  - c. Include the SE-311, Page 2 in the project file with all permits and approvals listed in Section 3.
4. DO NOT include the SE-311, Page 2 in the Project Manual.
5. SE-311
  - a. Insert the Agency complete name. Only “South Carolina” can be abbreviated to “SC”.
  - b. Insert the complete Project Name and Number as determined in Chapter 1. If project is within Agency’s Construction Contract Award Certification, Agency must create a project name and number for this use.
  - c. Insert the Construction Cost Range. This should be reasonable based on the cost estimate for this project.
  - d. Insert the Project Location, e.g., city or county.
  - e. Provide a Description of the scope and requirements of the Project, including Alternates, and any requirements that significantly affect the scope of work or the qualifications of the contractors. This section is limited to 500 characters, so be concise but complete.
  - f. Insert the Quote Due Date and Time.
  - g. Insert the complete Name, Email and Telephone Number of the Agency Project Coordinator. The Agency Project Coordinator should be the person designated by the Agency to respond to questions and to provide information regarding this project.
  - h. Provide the location or website where Documents may be obtained.
  - i. Fill in the Document Deposit Amount and whether it is refundable.
 

**NOTE:** The amount of the deposit should approximate the actual cost of printing. Any deposit over \$50 shall be refundable to all those returning the Documents, including subcontractors and suppliers, in good condition within 10 days after the quote due date. If plans are only distributed electronically, no deposit is to be charged.
  - j. Indicate the requirements for Performance Bond and Labor and Material Payment Bond to be provided if a contract is awarded. Performance Bond and a Labor and Material Payment Bond are required on all construction projects when the cost for construction is \$50,000 or greater.
  - k. Fill in the location of posting of all Public Notices.
  - l. Insert the complete Name, Contact Name, Email and Telephone Number of the A/E. If the project was designed in-house, insert the agency’s information.
  - m. Indicate requirements for a Pre-Quote Conference by checking the appropriate box. If there is going to be a conference, insert the Date, Time, exact Location, and information to allow attendance by electronic means.

- n. Insert the Quote Delivery Addresses for Hand and Mail delivery. The “Mail Service” address must include the street address.
  - o. Indicate if the project is estimated to be within Agency Construction Certification by checking the appropriate box.
6. SE-311, Page 2
- a. Insert the Project Name and Number the same as shown on the SE-311.
  - b. Item #1, Budget: Fill in all information requested.
    - (1) The Total Approved Project Funding is the total amount shown on the most recently approved A-1 form, or, for a Non-PIP, the budget established by the Agency for this project. This total must include the Construction Budget and any soft costs associated with this project.
    - (2) The Construction Budget for this Contract is an amount that represents the available funds allocated by the Agency for this construction contract, including contingencies.
    - (3) The Final Estimate of Construction Cost cannot be greater than the Construction Budget for this Contract. This is the A-E’s final estimate of the quote award amount, including all Alternates, as approved by the Agency.
  - c. Item #2, Flood Hazard: Insert ALL flood hazard information. This is required regardless of whether the project is in a flood hazard area.
  - d. Item #3, Status of Permits and Approvals Required Prior to Quote Award: Insert all information for the project. For project exceeding Agency certification, copies of all permits MUST be submitted to OSE prior to quote award.
  - e. The Agency’s Project Coordinator shall sign and date the form SE-311, Page 2. Include the Coordinator’s printed name and title.

**C. SE-331 - Quote Form**

1. QUOTE SUBMITTED BY: No action by A/E or Agency - to be completed by Offeror.
2. QUOTE SUBMITTED TO: Fill in the complete Agency name.
3. FOR PROJECT: Fill in the complete Project Name and Number
4. OFFER:
  - a. Section 2, ADDENDA: No action by A/E or Agency - to be completed by Offeror.
  - b. Section 3: The period of time for acceptance of quote is set at 60 days. If there is a desire to change this time period on the quote form, contact OSE.
  - c. Section 4: Insert the number of calendar days allowed for construction. The Agency, in consultation with the A/E, shall determine the time allowed to reach Substantial Completion for the work.
  - d. Section 5: Insert the dollar amount to be retained for each calendar day the actual construction time required to achieve Substantial Completion exceeds the specified or adjusted time for Substantial Completion as provided in the contract documents. Typical items to be considered for setting the amount of Liquidated Damages are those costs or expenses that the Agency would incur if the Agency is unable to have unimpeded occupancy or use of the project in the specified or adjusted contract time. Some examples of these are:
    - (1) Additional costs for agency personnel working on the project.
    - (2) For asbestos abatement projects, the cost of additional air monitoring paid by the Agency.
    - (3) Agency costs for displacement of departments or other agency functions delayed from occupying the facility, or other justified inconvenience to the Agency.
    - (4) Additional interest or other monetary expense charged against Agency funding; and
    - (5) Additional costs to the Agency generated by the A-E during the extended time, such as personnel directly involved with the project.
  - e. Section 6.1, BASE QUOTE: No action by A/E or Agency - to be completed by Offeror.
  - f. Sections 6.1.1 & 6.1.2, ALTERNATES: No action by A/E or Agency - to be completed by Offeror.

**D. SE-377, Minor Construction Contract**

1. Page 1:
  - a. Insert the Agency complete name. Only “South Carolina” can be abbreviated to “SC”.
  - b. Insert the complete Project Name and Number as determined in Chapter 1. If project is within Agency’s Construction Contract Award Certification, Agency must create a project name and number for this use.
  - c. Fill in the date of the agreement.
  - d. Fill in the Agency Name and Address.

- e. Fill in the Contractor's Name and Address.
  - f. Fill in the Work Description. This should be the same or very similar to what is shown on the SE-311 and include any alternates that were accepted by the Agency.
2. Section 1. Contract Terms and Extensions
    - a. Paragraph 1.1: Fill in the Date of Commencement of the Work and the Contract Time in calendar days.
    - b. Paragraph 1.2: Fill in the amount of Liquidated Damages that may be withheld.
    - c. Paragraph 1.3: Fill in the Contract Sum.
  3. Section 2. Contract Documents
    - a. Paragraph 2.1.2: Fill in date of Agency purchase requisition form.
    - b. Paragraph 2.1.3: Fill in the date of the Project Drawings & Specifications and any other documents that are to be part of the Contract.
  4. Section 3. Agency
    - a. Paragraph 3.1: Fill in Name, Title, Address, Telephone and Email of the Agency's Representative.
    - b. Paragraph 3.2: Check the box, if applicable.
    - c. Paragraph 3.4: Check one of the boxes as indicated.
  5. Section 4. Contractor
 

Paragraph 4.1: Fill in Name, Title, Address, Telephone and Email of the Contractor's Representative.
  6. Section 5. Insurance and Bonds
    - a. Paragraph 5.2: Check this box if this insurance is required.
    - b. Paragraph 5.3: Check this box is bonds are required.
  7. Bottom of Page 13
 

Fill in the Agency Representative Name and Title and the Date the Contract is signed.

**E. SE-355 – Performance Bond (if required)**

1. Insert the Agency Name and Address.
2. Insert the State Project Name and Number and Brief Description of Work.
3. Insert the A/E Name and Address.

**F. SE-357 – Labor & Material Payment Bond (if required)**

1. Insert the Agency Name and Address.
2. Insert the State Project Name and Number and Brief Description of Work.
3. Insert the A/E Name and Address.

**G. SE-381 – Change Order to Minor Construction Contract**

1. Insert the Agency Name.
2. Insert the Project Name and Number.

**H. Technical Specifications**

Insert all technical specifications into the Project Manual that are listed in the Table of Contents. Coordinate the names and number of each section with what is listed in the Table of Contents.