

GUIDE FOR ORGANIZING AND COMPLETING THE PROJECT MANUAL

Design-Bid-Build Projects over \$100,000.

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

A. Table of Contents

1. Use the OSE formatted Table of Contents found in Appendix B.1. Complete all the fillable sections.
2. Follow the instructions in *italics* to incorporate the technical specifications.

B. SE-310 – Invitation for Design-Bid-Build Construction Services

1. All sections of the SE-310 & SE-310, Page 2 must be completed with appropriate wording and boxes checked.
2. Submit a separate copy of the SE-310, Page 2 with the Construction Documents submittal. After approving the SE-310 in the OSE Database, the OSE Project Manager will send an approved copy of the SE-310 to the A/E and Agency by email for inclusion in the final bid documents.
3. DO NOT include the SE-310, Page 2 in the Project Manual.
4. The SE-310 included in the Bidding Documents must bear the OSE project manager's signature unless the project is within the Agency's construction contract award certification.
5. SE-310
 - a. Insert the Agency/Owner complete name. Only "South Carolina" can be abbreviated to "SC".
 - b. Insert the complete Project Name and Number as determined in Chapter 1.
 - 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 Bid Alternates and any requirements that significantly affect the scope of work or the qualifications of the bidders or sub-bidders. This section is limited to 500 characters, so be concise but complete.
 - f. Insert the Bid/Submittal Due Date and Time.
 - g. The Project Delivery Method – Design-Bid-Build – has already been filled in. If this is not your method, you need to use a different form for the invitation.
 - h. Insert the complete Name, Address, Email and Telephone Number of the Agency and the Agency Coordinator. The Agency Coordinator should be the person designated by the Agency to respond to questions and to provide information regarding this project.
 - i. Provide the location or website where Bidding Documents may be obtained
 - j. Indicate the requirements for the Bid Security: Bid Security is required for all competitive sealed bidding for construction contracts in excess of \$100,000.
 - k. 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 estimated cost for construction is \$50,000 or greater.
 - l. Indicate the amount of the deposit for Bidding Documents, if required.

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 Bidding Documents, including subcontractors and suppliers, in good condition within 10 days after the bid opening. If plans are only distributed electronically, no deposit is to be charged.
 - m. Insert the complete Name, Contact Name, Address, Email and Telephone Number of the A/E. If the project was designed in-house, insert the agency's information.
 - n. Indicate requirements for a Pre-Bid Conference by checking the appropriate boxes. Insert the Date, Time, exact Location, and information to allow attendance by electronic means. A Mandatory Pre-Bid Conference requires the Agency to provide a written determination that mandatory attendance is justified because of the unique nature of the project, and that it will not unduly restrict competition.

NOTE: OSE recommends a minimum of 7 calendar days from the date of beginning advertisement in SCBO to the date of any Pre-Bid Conference.

- o. Insert the Bid Opening Place and the Bid Delivery Addresses for Hand and Mail delivery of bids. The “Mail Service” address must include the street address.

NOTE: OSE recommends a minimum of 14 days from the date of any type of Pre-Bid Conference to the Bid Closing Date. When there is no Pre-Bid Conference, the OSE recommends a minimum of 21 days from the date of beginning advertisement in SCBO to the Bid Closing Date.

- p. Indicate if the project is estimated to be within Agency Construction Certification by checking the appropriate box.
6. SE-310, Page 2
- a. Insert the Agency/Owner complete name. Only “South Carolina” can be abbreviated to “SC”.
 - b. Insert the Project Name and Number the same as shown on the SE-310.
 - c. 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 bid award amount, including all Bid Alternates, as approved by the Agency.
 - d. Item #2, Flood Hazard: Insert ALL flood hazard information. This is required regardless of whether the project is in a flood hazard area.
 - e. Item #3, Status of Permits and Approvals Required Prior to Bid Advertisement: Insert all information for the project. Copies of all permits MUST be submitted to OSE prior to bid advertisement.
 - f. Item #5, Green Construction: Insert information as to whether this project is required to be LEED Silver or 2 Green Globes.
 - g. This page will be submitted to OSE through the OSE database along with page 1.

C. AIA Documents A701 Instructions to Bidders - South Carolina Division of Procurement Services, Office of State Engineer Version

This document is available only through AIA and can be purchased at the AIA “Document on Demand” (DoD) website, <https://ecommerce.aiacontracts.com/search/south%2520carolina?curpage=1>. Follow the AIA directions to purchase the document by providing the required Project information, purchase the document, and download the fillable pdf version to your computer. Insert a copy in the Project Manual as noted in the Table of Contents. (Note: The A701 SCOSE version is a locked pdf with fillable fields and is unable to be combined with other pdfs to comprise a complete electronic copy of the Project Manual. Therefore, the completed form must be printed and scanned to be included in the Project Manual.)

Once the A701 is purchased and downloaded, the remaining fillable fields are as follows:

1. Section 6.4: Provide the location of the posting of the Notice of Intent to Award (SE-370), as determined by the Agency.
2. Section 8.1: Provide a listing of the Contract Documents that are available to the Bidder.
3. Section 9.6: Provide a listing of Other Special Conditions for this Work, such as listings of Agency’s specific campus requirements, Federal Funding requirements, special documents required, if any, for the project etc. OSE must approve any special conditions prior to advertisement. If there are no special conditions, insert “NONE” in the fillable field. Upon request, OSE will provide suggested wording to be included for projects involving hazardous materials.

D. Bid Bond (AIA A310 reference)

The Agency should insert a spacer page stating that the Bid Bond must be in the form of the AIA Document A310. An original copy of the A310 should not be included.

E. SE-330 - Lump Sum Bid Form

1. Page BF-1
 - a. BID SUBMITTED BY: No action by A/E or Agency - to be completed by Bidder.
 - b. BID SUBMITTED TO: Fill in the complete Agency name.
 - c. FOR PROJECT: Fill in the complete Project Name and Number.
 - d. Section 2, BID SECURITY: No action by A/E or Agency - appropriate box to be checked by Bidder.
 - e. Section 3, ADDENDA: No action by A/E or Agency - to be completed by Bidder.

- f. Section 4: The period of time for acceptance of bid is set at 60 days. If there is a desire to change this time period on the bid form, contact OSE.
 - g. Section 6.1, BASE BID WORK: Insert the Base Bid work description as it appears in the Description of Project on the project SE-310. Omit any references to Bid Alternates and contractor qualifications.
2. Page BF-1A (*Delete this page if there are no Bid Alternates or Unit Prices requested.*)
- a. Section 6.2, BID ALTERNATES: Insert a description of each Alternate in sufficient detail to indicate whether it is an add-to or deduct-from the Base Bid. Bidders will check the box in front of “ADD TO” or “DEDUCT FROM”.
 - b. Section 6.3, UNIT PRICES: List only those items (with unit of measure) that most likely will be needed for Change Orders during the construction of the project. The Bidder should furnish requested unit prices.
3. Page BF-2, Section 7, Listing of Proposed Subcontractors
- a. BASE BID: The Agency, in consultation with the A/E, shall identify, by license classification, all licensed subcontractors who are expected to perform work or render service to the prime contractor and whose subcontracts to the contractor are each expected to exceed 3% of the prime contractor’s Base Bid.
NOTE: A subcontractor classification shall not be listed if the work of that specialty is a subclassification included within the scope of the prime contractor’s license. Refer to the provisions of SC Code §40-11-410, for information.
 - (1) "Subcontractor" is as defined in the SE-330. Material suppliers, manufacturers and fabricators are not subcontractors and are not to be listed.
 - (2) In the event the Agency and A/E determine that no subcontractor listing is required on BF-2, the words "NO SUBCONTRACTOR LISTING REQUIRED" shall be included on this page below Subcontractor Classification column. In this case, delete Page BF-2A of the SE-330.
 - (3) The Agency may list other subcontractor classifications, regardless of the expected value of their work, but only if the Agency determines that the work of that subcontractor is vital to the success of the project. OSE strongly discourages this practice.
 - b. ALTERNATES: Insert the subcontractor classifications for Alternates only if the work of the alternate subcontractor classification is estimated to be more than 3% of the prime contractor’s Base Bid.
 - c. The determination of which Subcontractor Classifications are listed in the Bid Form is not protestable by prospective bidders.
 - d. In Column (A), list the common name of the subcontractor license, i.e., Plumbing, Grading, Electrical,
4. Page BF-3
- a. Section 9, TIME OF CONTRACT PERFORMANCE AND LIQUIDATED DAMAGES
 - (1) CONTRACT TIME: 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.
 - (2) LIQUIDATED DAMAGES: 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 were unable to have unimpeded occupancy or use of the project in the specified or adjusted contract time. Some examples of these are:
 - (a) Additional costs for agency personnel working on the project.
 - (b) For asbestos abatement projects, the cost of additional air monitoring paid by the Agency.
 - (c) For dormitory projects, rental and/or other costs incurred for temporary housing for students, or for loss of student generated revenue because students could not be accepted.
 - (d) Agency costs for displacement of departments or other agency functions delayed from occupying the facility, or other justified inconvenience to the Agency.
 - (e) Additional interest or other monetary expense charged against Agency funding; and
 - (f) Additional costs to the Agency generated by the A-E during the extended time, such as personnel directly involved with the project.
 - b. Section 11, ELECTRONIC BID BOND: No action by A/E or Agency - to be completed by the Bidder.
5. Page BF-4: No action required by A/E or Agency - to be completed by the Bidder.

F. AIA Document A101 Standard Form of Agreement between Owner and Contractor (Including Exhibit A) - South Carolina Division of Procurement Services, Office of State Engineer Version

This document is available only through AIA and can be purchased at the AIA “Document on Demand” (DoD) website, <https://ecommm.aiacontracts.com/search/south%2520carolina?curpage=1>. Follow the AIA directions to purchase the document by providing the required Project information, purchase the document, and download the fillable pdf version to your computer. Insert a copy in the Project Manual as noted in the Table of Contents. (Note: The A101 SCOSE version is a locked pdf with fillable fields and is unable to be combined with other pdfs to comprise a complete electronic copy of the Project Manual. Therefore, the completed form must be printed and scanned to be included in the Project Manual.)

Once the A101 is purchased and downloaded, the remaining fillable fields are as follows:

1. Page 1: The day, month and year of the Agreement and the Contractor information will remain blank during the bidding period. Following the protest period and just prior to award of the contract, insert the required information in the appropriate fields.
2. Section 4.1: The Contract Sum will remain blank during the bidding period. Following the protest period and just prior to award of the contract, insert the amount of the Contract Sum, in words and numbers. This amount should be same as listed on the posted SE-370, Notice of Intent to Award.
3. Section 4.2: The Alternates will remain blank during the bidding period. Following the protest period and just prior to award of the contract, list the Alternates that were accepted by the Owner and included in the Contract Sum. List each Alternate separately with the amount for that Alternate.
4. Section 4.3: The Allowances will remain blank during the bidding period. Following the protest period and just prior to award of the contract, list any Allowances that are included in the Contract documents.
5. Section 4.4: The Unit Prices will remain blank during the bidding period. Following the protest period and just prior to award of the contract, list any Unit Prices agreed to by the Owner and Contractor.
6. Section 4.6: Insert any provisions for incentives or bonus that may result in a change in the bidders Contract Sum prior to bidding.
7. Section 5.1.2: This section will remain blank during the bidding period. Prior to award of the Contract the Agency and the Contractor shall coordinate the completion of the section.
8. Section 8.2: Insert the Name and Contact information for the Owner’s Senior Representative and Representative.
9. Section 8.3: Insert the Name and Contact information for the Contractor’s Senior Representative and Representative.
10. Section 8.5: Insert the Name and Contact information for the A/E Representative.
11. Section 8.7: This section will remain blank during the bidding period. Prior to award of the Contract the Agency and the Contractor shall coordinate the completion of the section.
12. Section 8.8.1: A detailed Construction Schedule in accordance with this Section may result in a change in the bidders Contract Sum. If the Agency wants a more detailed schedule, check the box provided prior to bidding.
13. Section 9.1.5 and 9.1.6: This section will remain blank during the bidding period. Prior to award of the Contract, list the Drawings and Specifications or reference them as an attachment in the Table of Contents of the Project Manual.
14. Section 9.1.7: This section will remain blank during the bidding period. Prior to award of the Contract, complete this section in accordance with the Addenda advertised.
15. Section 9.1.8: As necessary, check the boxes and insert the required information for Sustainable Projects and the Sustainable Plan in this section that may result in a change in the bidders Contract Sum.
16. Section 9.1.8: As necessary, check the box and insert any additional Agency-created Supplementary Conditions that have been approved by OSE.
17. Section 9.1.9: List other documents that are intended to form part of the Contract Documents.
18. Exhibit A, Page 1: The day, month and year of the Agreement and the Contractor information will remain blank during the bidding period. Following the protest period and just prior to award of the contract, insert the required information in the appropriate fields.
19. Exhibit A, Section A.2.3.1: Insert the required information in accordance with the Property Insurance that the Agency will provide for existing structures.
20. Exhibit A, Section A.2.4: Check the box and insert other project specific insurance the Agency may purchase and applicable limits.
21. Exhibit A, Section A.3.2.1: If the Contractor is required to maintain required insurance for a period longer than indicated in the General Conditions that may result in a change in the bidders Contract Sum, state the duration.

22. Exhibit A, Section A.3.2.8: If the Contractor is required to provide Maritime Liability Insurance that may result in a change in the bidders Contract Sum, insert the required limit.
23. Exhibit A, Section A.3.2.9: If the Contractor is required to provide insurance for the operation of Manned or Unmanned Aircraft that may result in a change in the bidders Contract Sum, insert the required limits.
24. Exhibit A, Section A.3.3.1: Insert the required information in accordance with the Builder’s Risk Property Insurance that the Contractor will provide. If Builder’s Risk Property Insurance is not required for the project, please cross through all of section A.3.3.
25. Exhibit A, Section A.3.4.1: If the Contractor is required to maintain other insurance for a period longer than indicated in the General Conditions that may result in a change in the bidders Contract Sum, state the duration.
26. Exhibit A, Section A.3.4.2: If the Contractor is required to provide the insurances noted in the sub-paragraphs that may result in a change in the bidders Contract Sum, check the boxes.
27. Exhibit A, Section A.3.5: List the Performance and Payment Bond and for the Penal Sum, fill in “100% of Contract Price” across from each Bond.
28. Exhibit A, Section A.4: Insert any special terms or conditions that modify Exhibit A that may result in a change in the bidders Contract Sum.

G. AIA Document A201 General Conditions of the Contract for Construction- South Carolina Division of Procurement Services, Office of State Engineer Version

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Once the A201 is purchased and downloaded, the remaining fillable fields are as follows:

1. Article 16: Provide a listing of project specific requirements, such as listings of Agency’s specific campus requirements, Federal Funding requirements, special documents required, if any, for the project etc. If there are no special conditions, insert “NONE” in the fillable field. Upon request, OSE will provide suggested wording to be included for projects involving hazardous materials.

H. SE-355 – Performance Bond

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.

I. SE-357 – Labor & Material Payment Bond

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.

J. SE-380 – Change Order to Construction Contract, Pages 1 & 2

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

K. 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.