## GUIDE FOR ORGANIZING AND COMPLETING THE PROJECT MANUAL

**Design-Bid-Build Projects**

This guide describes the requirements for organizing and completing the OSE-required Front-End documents for the typical large construction project. The Project Manual should include the following in the order shown:

### **Table of Contents**

#### Use the OSE formatted Table of Contents found in Appendix A.2.

#### Follow the instructions in *italics* to incorporate the technical specifications.

1. **SE-310 – Invitation for Construction Services**
2. All sections of the SE-310, pages 1 & 2, must be completed with appropriate wording and boxes checked.
3. Submit a separate copy of pages 1 and 2 with the Construction Documents submittal. Page 1 must be submitted to OSE in Word format. A signed copy will be returned to the A/E by email for inclusion in the final bid documents.
4. DO NOT include page 2 in the project manual – even for review purposes.
5. 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.

#### SE-310, Page 1

##### Fill in the complete Project Name and Number as determined in Chapter 1.

##### Fill in the Project Location, e.g., city or county.

##### Indicate the requirements for Bid Security: Bid Security is required for all competitive sealed bidding for construction contracts in excess of $50,000.

##### 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.

##### Indicate the project Construction Cost Range. This should be reasonable based on the cost estimate for this project.

##### Give a full Description of the scope and requirements for the Project, including Bid Alternates and any requirements that significantly affect the scope of work or the qualifications of the bidders or sub-bidders.

##### Indicate the location where bidding documents are on file, where they may be obtained, and the amount of deposit, if required.

### **NOTE:** The amount of the Plan 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 Plan Deposit should be charged.

##### Fill in the complete Name, Address, Email, Telephone Number and FAX Number of the A/E. If the project was designed in-house, fill in the agency’s information.

##### Fill in the complete Name, Address, Email, Telephone Number and FAX 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.

##### Indicate requirements for a Pre-Bid Conference by checking the appropriate boxes. Fill in Date, Time and exact Location. 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 14 calendar days from the date of advertisement in SCBO to the date of any Pre-Bid Conference.

##### Fill in the Bid Closing Date, Time and exact Location 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 advertisement in SCBO to the Bid Closing Date.

##### Indicate if the project is estimated to be within Agency Construction Certification by checking the appropriate box.

#### SE-310, Page 2

##### Fill in the Project Name and Number the same as shown on page 1 of the SE-310.

##### Fill in all Budget Information.

###### 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.

###### The Construction Budget for this Contract is an amount that represents the available funds allocated by the Agency for this contract, including contingencies.

###### The Final Estimated 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.

##### Provide the requested Project Data. Fill in “N/A” if not applicable to this project.

##### Indicate the A/E’s Submittal of plans to Local Authorities. This is a requirement of the OSE to support the construction inspection requirements; therefore, an explanation must be given if the submittal was not made. Include the name and contact information of the local authorities, whether or not a submittal was made.

##### Fill in ALL Flood Hazard information. This is required regardless of whether or not the project is in a flood hazard area.

##### Fill in all information regarding Status of Permits and Approvals Required for the project. Copies of all permits MUST be submitted to OSE prior to bid advertisement.

##### Fill in information as to whether this project is required to be LEED Silver or 2 Green Globes.

##### The Agency’s Project Coordinator shall sign and date Page 2 of the form SE-310. Include the Coordinator’s title.

### **AIA Document A310 – Bid Bond**

The Agency may elect to omit an original document at its discretion, provided a replacement page is inserted with information stating where prospective bidders may view the document (i.e., the A-E’s or Agency’s offices).

### **AIA A701-1997 Instructions to Bidders - South Carolina Division of Procurement Services, Office of State Engineer Version**

### AIA has now combined the AIA A701 with OSE Form 00201 and named it as shown above. This document is available only through AIA. The Agency may elect to omit an original document at its discretion, provided a replacement page is inserted with information stating where prospective bidders may view the document (i.e., the A-E’s or Agency’s offices).

#### Page 1: Fill in the Project, Agency and A/E Name and Location.

#### Page 11, Section 9.4: Fill in the location of the posting of the OSE Form SE-370, Notice of Intent to Award, as determined by the Agency.

#### Section 9.9: Fill in with only 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, fill in “NONE”.

#### Upon request, OSE will provide suggested wording to be included for projects involving hazardous materials.

### **SE-330 - Lump Sum Bid Form**

#### Page BF-1

##### BID SUBMITTED BY: No action by A/E or Agency - to be completed by Bidder.

##### BID SUBMITTED TO: Fill in the complete Agency name.

##### FOR PROJECT: Fill in the complete Project Name and Number.

##### BID SECURITY (Section 2): No action by A/E or Agency - appropriate box to be checked by Bidder.

##### ADDENDA (Section 3): No action by A/E or Agency - to be completed by Bidder.

##### 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.

##### BASE BID WORK (Section 6.1): Insert the Base Bid work description as it appears in the Description of Project on the project form SE-310. Omit any references to Bid Alternates and contractor qualifications.

##### BASE BID: No action by A/E or Agency - to be completed by Bidder.

#### Page BF-1A *(Delete page if there are no Bid Alternates or Unit Prices)*

##### BID ALTERNATES (Section 6.2): 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”.

1. UNIT PRICES (Section 6.3): List only those items that might be needed for Change Orders during the construction of the project. The Bidder should furnish requested unit prices.

##### Page BF-2, Listing of Proposed Subcontractors (Section 7)

##### BASE BID WORK: The Agency, in consultation with the A/E, shall identify by specialty all 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 specialty shall not be listed if the work of that specialty is a sub classification included within the scope of the prime contractor’s license. Refer to the provisions of §40-11-410 of the SC Code of Laws, as amended, for information.

###### "Subcontractor" is as defined in the Form SE-330. Material suppliers, manufacturers and fabricators are not subcontractors and are not to be listed.

###### 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 Specialty column.

###### The Agency may list other subcontractor specialties, 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.

##### ALTERNATE BID WORK: Fill in subcontractor listings for Alternates only if the work of the alternate subcontractor specialty is estimated to be more than 3% of the prime contractor’s Base Bid.

### The determination of which Subcontractor Specialties are listed in the Bid Form is not protestable by prospective bidders.

#### **4.** Page BF-3

##### TIME OF CONTRACT PERFORMANCE AND LIQUIDATED DAMAGES (Section 9)

###### CONTRACT TIME: Fill in 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.

##### LIQUIDATED DAMAGES: Fill in the dollar amount to be retained for each day the project is not Substantially Completed within the specified or adjusted contract time for Substantial Completion. Typical items to be considered for 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. 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;
4. Agency costs for displacement of departments or other agency functions delayed from occupying the facility, or other justified inconvenience to the Agency;
5. Additional interest or other monetary expense charged against Agency funding; and
6. Additional costs to the Agency generated by the A-E during the extended time, such as personnel directly involved with the project.

##### ELECTRONIC BID BOND (Section 11): 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.

### **AIA Document A101-2007 Standard Form of Agreement between Owner and Contractor - South Carolina Division of Procurement Services, Office of State Engineer Version**

#### AIA has now combined the AIA A101 with OSE Form 00501 and named it as shown above. This document is available only through AIA. The Agency may elect to omit the original document at its discretion, provided a replacement page is inserted with information stating where prospective bidders may view the document (i.e., the A/E’s or Agency’s offices). Do not include the filled out A101 in the Bidding Documents unless originals of the A101 are used.

#### Page 1: Fill in the Agency Name and Location, Project Name and Number and A/E Name and Location.

#### Page 5, Section 8.3: Fill in the Name and Contact information for the Owner’s Senior Representative and Representative.

#### Page 6, Section 8.6: Fill in the Name and Contact information for the A/E Representative.

#### Page 6, Section 9.1.3: List any additional Agency-created Supplementary Conditions that have been approved by OSE

#### Other information in the contract is to be completed after the project is bid.

### **AIA Document A201-2007 General Conditions of the Contract for Construction- South Carolina Division of Procurement Services, Office of State Engineer Version**

#### AIA has now combined the AIA A201 with OSE Form 00811 and named it as shown above. This document is available only through AIA. The Agency may elect to omit the original document at its discretion, provided a replacement page is inserted with information stating where prospective bidders may view the document (i.e., the A/E’s or Agency’s offices).

##### Page 1: Fill in the Project Name and Number, Agency Name and Location and A/E Name and Location.

##### Page 16, Section 3.10.3: Check the box if the Agency wants a more detailed schedules as described.

##### Page 47, Section 16.1: Indicate which inspection services are required for the Project. Inspection requirements are discussed in detail in Chapter 7, paragraph 7.6 of the OSE Manual.

###### At the A-E’s discretion, typical inspection requirements may be inserted in Section 01400 “Quality Assurance” of the technical specifications.

###### If this approach is taken, insert in Section 16.1 after “Remarks” a statement referring the bidder to section 01400 for typical inspection requirements.

###### After “Remark”, write “All inspections provided by owner.”

##### Articles 16.2 through 16.7: Fill in these sections with specific appropriate information. Make sure the information is coordinated with the applicable sections of the project manual, and reference the Section number in each of these articles. If an Article is not applicable, enter “NONE”.

###### Additional Agency-created Supplementary Conditions may be used with the prior approval of the OSE.

###### Upon request, OSE will provide suggested wording to be included in the Supplementary Conditions for projects involving hazardous materials.

### **SE-355 – Performance Bond**

## Fill in the Agency Name and Address.

## Fill in State Project Name and Number and Brief Description of Work.

## Fill in A/E Name and Address.

### **SE-357 – Labor & Material Payment Bond**

# Fill in the Agency Name and Address.

# Fill in State Project Name and Number and Brief Description of Work.

# Fill in A/E Name and Address.

### **SE-380 – Change Order to Construction Contract**

## Fill in the Agency Name

## Fill in the Project Name and Number.

### **Technical Specifications**

#### Insert all technical specifications into the project manual.

#### Include in Section 01400 “Quality Assurance” all requirements for Special Inspections.