



Tender Process

The most important process for a well-run project is a well-run tender. In order for your contractor to do what you want and minimize issues during construction, our tender documents need to accurately communicate your expectations.

So, first and foremost, you need to make sure your expectations are well understood yourselves.

- 1) First, **Create** a copy of the “Sample Project” folder, which contains all the subfolders and template documents you need for a new project. Name the folder something easy to search, and keep all your project files in the same folder, always.

** Make sure you save the folder on your computer's hard drive, not the desktop, and remember to make a backup copy of your project folders regularly! **

- 2) **Prepare** design drawings for the project, with the help of an architect. Your architect will need to know the following:
 - a) Size and configuration of the structure, and your preferred construction material choices. The tender manual has several optional items in it that you need to determine for construction, and tell your architect about – for example:
 - (i) Roofing – asphalt or metal?
 - (ii) Fireplace included in each unit?
 - (iii) Wood deck or concrete patio?
 - (iv) Sidewalk around the perimeter?
 - (v) Type of shelving – plywood or coated wire?
 - (vi) Other specifics as needed.



- b) Send them your edited “Construction Manual” and the “Typical Construction Details” booklets for reference so they know what your construction practices are expected to be, and they can incorporate that into their own drawing production.
 - c) That the project is for band housing, on reserve land, and therefore will not need to be submitted for building permit. The project does, however, need to meet current building codes.
 - d) There is no survey or site plan required. Location on site will be selected by the Band.
 - e) The address of the project, and name of the Owner.
- 3) **Review** your architect’s draft of the Design Drawings thoroughly for accuracy before authorizing them to proceed with the working drawing (tender) set.
- 4) **Decide** internally on the extent of the scope of work you want to undertake for your tender– for example, do you want this to be a:
- a) General Contractor – complete project, start to finish.
 - b) To lockup – includes foundation, framing, roofing, building wrap, window and exterior door installation, perimeter drainage, and backfill.
 - c) A specific Scope of Work, such as painting or electrical.

Also, you need to decide on what date you want to close the tender. A reasonable period of time for pricing is about 3 weeks.

- 5) **Edit** the “Construction Manual” to reflect all of the above:
- a) Firstly, edit the CRITICALLY IMPORTANT manual sections which will always need to be changed by the Owner, to reflect new project information, which direct the bidders on what exactly you expect them to price:
 - i) Section 2 - Project Definition – include information here on the specifics of the TENDER.
 - Include a name and contact information for whoever will be responsible for answering questions during the tender.
 - You also should state in this section what your requirements are for the bid submittal (ie. additional documents such as proof of



insurance) and what your criteria for selection will be, if anything but lowest bid.

- **If you mean it to be a public opening**, then you need to include an address and time for the bid opening, and how bids need to be submitted (ie. hard copy submitted in person or by courier, if by fax is acceptable, etc.).
 - ii) Section 4 - Scope of Work – check the lines off that you mean to include in this bid, and delete the remainder of the items on the list.
 - iii) Section 6 – Project Material Schedules – double-check that the lists at the end of the Manual include the correct information for your color scheme.
- b) RETURN TO TABLE OF CONTENTS, right click mouse button, and UPDATE ALL HEADINGS.
 - c) Read through all of the consulting NOTES in the sidebar of the Manual again, just to make sure you edited everything that is relevant.
 - d) When you are confident that you are done with your edits, turn “Show Comments” OFF before printing (located in the “review” tab in MS Word).
 - e) Print and review. The remainder of the Manual *should* not ever need editing, unless the Band decides to self-perform any sections of the work, or change materials. Just to be sure though, READ THE MANUAL before sending it to anyone, and correct any changes.
- 6) **Contact** at least three, but preferably more, builders to perform the scope of work you have decided on. More is better because there will definitely be some who do not price, or don’t meet your expectations if they do. You want to be sure you get at least two conforming bids.
- 7) **Compile** a complete **Combined Tender Package**, in both hard copy and PDF, which includes:
- (i) Edited Construction Manual
 - (ii) Project’s Design Drawings
 - (iii) Typical Construction Details



- 8) **Forward** a copy of the Combined Tender Package to the builders you have selected, with a record of transmittal of the documents you sent. Make sure to keep a hard copy and an electronic copy of what you sent out for your own records, as these will become the basis of your contracts, going forward.

Now...

9) **The TENDER:**

- a) **Changes** - If there are any changes to the documents during the tender period, including the bid close date, make sure to notify everyone who is bidding, formally (in writing), of the change.
- b) **Questions** - Make sure there is someone designated to answer any questions that your contracts may have. Follow up on the questions quickly, and distribute the answers formally to everyone who is bidding. DO NOT change the expectations of the tender without informing everyone who is preparing a quote for you.
- c) **Follow up** – mid-way during the tender period, give all the builders you have pricing the work a call to make sure they are still good with everything in the scope and that they definitely intend to quote it by the close date. If you don't feel confident you'll get a quote from them, try to find another contractor to price it, as a backup plan. Otherwise you can extend your close date if anyone really needs extra time. Don't give too much time in your extension though, another week at most.
- d) If there is any discrepancies discovered during the tender process, its not a bad idea to incorporate the corrections into the **COPY** of the Manual template if you are confident using MS Word, or if not, make a list of clarifications that you can refer to for later projects.

The CLOSING:

- a) At the established time and place set out in your tender package (in the Project Manual under Section 2 - Project Definition), receive and open all submitted bids. Record the name of the person who submitted and the time received on the package.



- b) If your document package has been put together properly, you should have multiple competing bids that are for more-or-less equivalent work, as well as a set of contract documents for whoever you award to. Remember though that people often interpret things differently, so your job before awarding a contract is to weed out what everyone who priced it interpreted differently from the others – in other words, what they have specifically included and excluded.
- c) Once you have a preferred bidder, move on to the **contract** stage! First though, determine what work that you need to do for them before they start work (ie. do you need to clear and bring in fill material?), and what will and will not be ready for them (ie. will they have access to hydro on site when they start or do they need to bring a generator?).