

Bid Document/Drawing Review Checklist



Use this bid document/drawing review checklist as a quality assurance checklist to ensure that bid documents are tender ready. This checklist is a subset of the full [Standards for Consultant Deliverables](#). Refer to [Technical Resource Center \(TRC\)](#) to review the appropriate [Specifications Sections](#) as outlined in the following checklist.

Project Title: _____

(Location – Building Name)

(Secondary Title)

Project ID: _____ Plan No.: _____ Building No.: _____ Record ID: _____

1. Specifications in General

Completed N/A

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Specifications sections are in MS Word, PDF and compiled into PDF format. |
| <input type="checkbox"/> | <input type="checkbox"/> | Compiled PDF has been bookmarked. |
| <input type="checkbox"/> | <input type="checkbox"/> | No security has been applied to any sections and compiled PDF. |
| <input type="checkbox"/> | <input type="checkbox"/> | Numbering sequence is correct and font is consistent with GoA standards . |
| <input type="checkbox"/> | <input type="checkbox"/> | All applicable sections pertaining to the project have been used. |
| <input type="checkbox"/> | <input type="checkbox"/> | Environmental management requirements have been considered (e.g. hazardous materials) and environmental reports are submitted as required. |
| <input type="checkbox"/> | <input type="checkbox"/> | Correct type of specifications have been used (e.g. BMS , SPMS , and SFMWC). |
| <input type="checkbox"/> | <input type="checkbox"/> | Latest applicable specification section versions from Technical Resource Centre have been used by consultants. |
| <input type="checkbox"/> | <input type="checkbox"/> | Latest applicable specification versions from Technical Resource Centre have been used by sub-consultants. |
| <input type="checkbox"/> | <input type="checkbox"/> | Correct Project ID and Plan No. is on the cover page and all applicable section headers. |
| <input type="checkbox"/> | <input type="checkbox"/> | Sections that are cross-referenced in a section are included in the Table of Contents and individual sections are in the bid document package. |
| <input type="checkbox"/> | <input type="checkbox"/> | Bracketed items have been edited. |
| <input type="checkbox"/> | <input type="checkbox"/> | Version date in the footer have not been removed. |
| <input type="checkbox"/> | <input type="checkbox"/> | All "Spec notes" and unused product options have been removed. |
| <input type="checkbox"/> | <input type="checkbox"/> | No extra clauses have been added that do not belong or conflict with front end requirements. |
| <input type="checkbox"/> | <input type="checkbox"/> | Ensure all template forms (e.g. Insurance Certificate Templates, L & M Bond) are included by the consultant. |
| <input type="checkbox"/> | <input type="checkbox"/> | GoA standards for products have been specified (e.g. carpet). |

Bid Document/Drawing Review Checklist

- No makes, models, trade marks, trade names, patents, specific origin, contractors and manufacturers are mentioned in the Specification.
In rare cases (e.g. to match existing), if proprietary products have been specified by name, applicable section has been included (01 62 00B; 00 70 00 SFMWC; 00 72 14SP). In such an instance, Technical Services Branch and Procurement are consulted and Project Manager's approval is obtained.
- No redundant sections have been used (e.g. shop drawings, product data and samples does not need a separate section 01 33 23B if section 01 33 00B or 01 00 15SP has been included).
- Non-applicable sections have been removed.
- PDF of the Project Manual has been created and proof-read to ensure:
 - All Sections mentioned in the TOC are included in the Project Manual
 - There are no formatting errors (e.g. brackets, huge spaces between paragraphs).
 - Font size and style is consistent throughout Project Manual, including headers.
 - *Sub-headers are NOT on the bottom of page*
 - *Pages are formatted so a single line or "End of Section" is NOT alone on a sheet*

2. Drawings

Completed N/A

- Hardcopy and electronic drawings (PDF and CAD files) are being submitted to the Project Manager at the same time (electronic drawings may be submitted on CD/DVD, USB, or by e-mail).
- Drawings, including drawings prepared by sub-consultants, have been prepared in accordance with '[Standards for Consultant Deliverables](#)'.
Drawings numbering system is consistent and logical in accordance with '[Standards for Consultant Deliverables](#)'.
- Drawings show that they have been '**Issued for Tender**' including the date.
- Drawings have been prepared using current Infrastructure title blocks, and include the proper Project Title, Plan Number and Project ID.
- The individual PDF drawings have been named in accordance with the following naming convention:
Plan Number_Bldg/SiteNo_ DWG_Drawing Number, e.g. 010010_B0278_DWG_105.
- No security or lock has been applied to individual PDF drawing files.
 - Consultant may group drawings by discipline (e.g. mechanical, architectural, etc.)
 - Files are to be as compressed as possible.

3. Pre-Bidding Meeting and Closing Dates

- Pre-Bid meeting and closing dates are not set until documents are bid ready.
- Pre-Bid meeting and closing dates are consistent on the Cover and in the bid documents.

Bid Document/Drawing Review Checklist

4. Project Title and Cover Page

Completed N/A

- Current specification section version has been used (00 01 01B; 00 00 10SP). Project title is correct:
 - LOCATION – BUILDING NAME (e.g. EDMONTON – INFRASTRUCTURE BUILDING)
 - Secondary title adequately describes scope of work (e.g. Cooling Tower Replacement)
- Street address of the project location is correct.
- Pre-bid meeting date and location has been identified.
- Bid closing date has been identified on the cover and on the first page of “Instructions to Bidders”.
- Reference numbers are correct (check whichever of the following apply).
 - Project ID
 - Record ID (if applicable)
 - Plan No.
 - Building No. or Site No.
- Prime consultant has been identified on the second page of the Specification Manual.

5. Table of Contents (TOC)

Completed N/A

- Current specification section version has been used (00 01 10B; 00 00 10SP).
- Sections identified in the TOC are included in the bid document package.
- Section numbers and names listed in the TOC are the same as shown on individual section headers.

6. Drawing List

Completed N/A

- Current specification section version has been used (00 01 15B; 00 01 25B; 00 01 16SP).
- Drawings are listed in correct order.
- Drawing numbers, titles and dates correspond with submitted drawings.

7. Instructions to Bidders

Completed N/A

- Current specification section version has been used (00 21 13B; 00 21 14SP).
- Specification section is edited to suit project.
 - Correct project title has been entered. Bid and contract form supplements have been identified (e.g. Bid security).
- Safety prequalification has been identified (e.g. COR).

Bid Document/Drawing Review Checklist

8. Pre-Bid Meeting

Completed N/A

- Review the pre-bid meeting section 00 25 13B and select applicable conditions.

9. Available Information Documents

Completed N/A

- Other available information has been edited accordingly (00 31 00B) and attachment(s) included.

10. Bid Form

Completed N/A

- Correct type of bid and contract form is used (e.g. stipulated price vs. unit price) (00 41 13B; 00 41 19B; 00 41 43B; 00 41 14SP; 00 41 49SP).
- Agreement form has been included if BMS bid forms used (00 52 13B).
 - Bid Closing address for closing location is identified.
 - Correct project title, project ID, plan number and building number have been used.
 - Required bid form supplements are referenced (eg bid security).
 - Cash allowance is referenced (*if applicable*).

11. Bid Security

Completed N/A

- Bid security is required (00 43 13B; 00 43 13SP).
- Contract performance security is required (00 61 13B; 00 61 13SP).
- Security for Payment of Claims is required (00 61 90B; 00 61 90B-A).
- Other security _____

12. Assignment and Novation

Completed N/A

- If there is an assignable contract, applicable sections have been included (00 52 91B; 00 61 91B; 00 73 05B; 01 11 07B; 01 11 08B).

13. Supplementary Conditions

Completed N/A

- If there are supplementary conditions (e.g. payment by landlord, etc.) applicable sections have been included (00 73 00B; 00 73 03B; 00 73 05B; ; 00 73 07B; 00 73 06B).

Bid Document/Drawing Review Checklist

14. Insurance

Completed N/A

- Applicable insurance sections have been included.
- Asbestos Abatement, if applicable.

15. Leased Space, Institutional Space, Client Special Procedures

Completed N/A

- If project is in leased space, applicable sections have been included (00 73 07B; 01 35 13B).
- If project is in an institutional space, applicable sections have been included (01 35 14B).
- If project is in a space occupied by Alberta Innovates Technology Futures, applicable sections have been included (01 35 17B; 01 35 17B-A).
- Additional requirements by a TPM, landlord or client have been included.
- Heritage Buildings

Standards and Guidelines for the Conservation of Historic Places in Canada – need clearance from Alberta Culture and Tourism to ensure an approach of minimal intervention and that proper special considerations are taken when applicable.

16. Work of the Project

Completed N/A

- Correct specification section has been included (01 11 00B; 01 00 15S):
 - Contract time is specified and attainable (interim acceptance).
 - Related work by other contractors, if any, has been identified.
 - Related work by the Province, if any, has been identified.
 - Restrictions on use of premises have been identified.

17. Allowances

Completed N/A

- If cash allowance has been specified, materials or work are specified properly (01 21 13B).

18. Alternatives

Completed N/A

- If alternatives have been recommended, Technical Services Branch and Procurement have reviewed (01 23 00B).

19. Work Site Safety

Completed N/A

- Prime Contractor for OHS has been identified and sections edited accordingly (01 35 29B; 01 00 15SP).

Bid Document/Drawing Review Checklist



Plan No.: _____

Project ID: _____

20. Security Clearances

Completed N/A

- Project Safety and Security Procedures Section have been included (01 35 14B).

| | | | |
|---|-----------------------------|-------------|------|
| Project/Contract Name | | Plan Number | |
| I/we hereby: | | | |
| <ul style="list-style-type: none">• Confirm that I/we have performed the above bid documents/drawing review, and• Acknowledge that in the event of a failure to comply with any of the above requirements, the bid documents/drawings may be returned to us for correction at our expense. | | | |
| Name of Consulting Firm | | | |
| Name of Representative (printed) | Signature of Representative | | Date |