

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 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.2. Complete all of 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, pages 1 & 2, must be completed with appropriate wording and boxes checked.
2. Submit a separate copy of pages 1 and 2 with the Construction Documents submittal. Page 1 must be submitted to OSE in MS Word format. A signed copy will be returned to the A/E and Agency by email for inclusion in the final bid documents.
3. DO NOT include page 2 in the project manual – even for review purposes.
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, Page 1
 - a. Fill in the Agency/Owner complete name. Only “South Carolina” can be abbreviated to “SC”.
 - b. Fill in the complete Project Name and Number as determined in Chapter 1.
 - c. Fill in the Project Location, e.g., city or county.
 - d. Give a 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. This section is limited to 500 characters, so be concise but complete.
 - e. Fill in the Bid Due Date.
 - f. Fill in the Construction Cost Range. This should be reasonable based on the cost estimate for this project.
 - g. The Project Delivery Method – Design-Bid-Build – has already been filled in. If this is not your method, you need to use another for the invitation.
 - h. Indicate the requirements for Bid Security: Bid Security is required for all competitive sealed bidding for construction contracts in excess of \$50,000.
 - i. 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.
 - j. Indicate where bidding documents 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. This needs to be stated in the project manual. If plans are only distributed electronically, no Plan Deposit should be charged.
 - k. Fill in the complete Name, Contact Name, Address, Email and Telephone Number of the A/E. If the project was designed in-house, fill in the agency’s information.
 - l. Fill in 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.
 - m. 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 beginning advertisement in SCBO to the date of any Pre-Bid Conference.

- n. Fill in the Bid Closing Date, Time and 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.

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

6. SE-310, Page 2

- a. Fill in the Project Name and Number the same as shown on page 1 of the SE-310.
- 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 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.
- c. Item #2, Project Data: Provide the requested information. Fill in "N/A" if not applicable to this project.
- d. Item #3, Submittal to Local Authorities: This is a requirement of 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. Local Authority includes the local Fire Official.
- e. Item #4, Flood Hazard: Fill in ALL Flood Hazard information. This is required regardless of whether or not the project is in a flood hazard area.
- f. Item #5, Status of Permits and Approvals Required Prior to Bid Advertisement: Fill in all information for the project. Copies of all permits **MUST** be submitted to OSE prior to bid advertisement.
- g. Item #6, Green Construction: Fill in information as to whether this project is required to be LEED Silver or 2 Green Globes.
- h. The Agency's Project Coordinator shall sign and date Page 2 of the form SE-310. Include the Coordinator's title.

C. 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 that the Bid Bond must be in the form of the AIA Document A310.

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

This document is available only through AIA. The Agency may no longer elect to omit an original document at its discretion, since all the variable information completed in it is known at time of solicitation for bids, and it is beneficial to the bidders have easy access to these portions of the contract documents. This document may be found at the AIA "Document on Demand" (DOD) website, <https://documentsondemand.aia.org/?filter=SCOSE>. Fill this document out completely on the DoD website and purchase it from AIA. Insert it in the project manual where shown in the Table of Contents.

- 1. Page 1: Fill in the State Project Name and Number with Location and the Agency (Owner) and A/E Name and Location.
- 2. Page 11, Section 9.4: Fill in the location of the posting of the Notice of Intent to Award (SE-370), as determined by the Agency.
- 3. Page 12, Section 9.7 (should be 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.

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 sub classification 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: Fill in 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 the left column list the common name of the subcontractor work (specialty), i.e. Plumbing, Grading, Electrical,
4. Page BF-3
 - a. Section 9, TIME OF CONTRACT PERFORMANCE AND LIQUIDATED DAMAGES
 - (1) 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.
 - (2) LIQUIDATED DAMAGES: Fill in 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:
 - (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 A101-2007 Standard Form of Agreement between Owner and Contractor - South Carolina Division of Procurement Services, Office of State Engineer Version

This document is available only through AIA. Because this document must be completed before purchasing from AIA, the Agency should omit the original document and provided a replacement page inserted stating the following: “The Form of the Contract shall be the SCOSE Version of the AIA Document A101-2007, Standard Form of Agreement Between Owner and Contractor where the basis of payment is a Stipulated Sum, which is incorporated herein by reference. Samples of these documents may be viewed in Appendix J.2 of the OSE Manual, found at <https://procurement.sc.gov/manual>.”

When you are ready to purchase the form (after bidding), complete it as follows:

1. Page 1: Fill in the Agency (Owner) Name and Location, Contractor Name and Location, State Project Name and Number and short description and A/E Name and Location.
2. Page 2, Section 3.3: Fill in the number of days for completion of the project (same as shown on the SE-330 unless modified by agreement between Owner and Contractor after bid.) Include the amount to be charges for Liquidated Damages.
3. Page 3, Section 4.1: Fill in the contract amount. This should be same as on the Contractor’s Bid Form unless the amount was allowed to be negotiated down. In such case, provide an explanation.
4. Page 3, Section 4.2: List alternates that were accepted by the owner and included in the total contract price. List each alternate separately with the price bid for that alternate.
5. Page 3, Section 4.3: List any unit prices agreed to by the Owner and Contractor. These do not have to be the same as those listed, if any, on page BF-1A of the SE-330.
6. Page 3, Section 4.4: List any allowances that were included in the contract documents.
7. Page 5, Section 8.3: Fill in the Name and Contact information for the Owner’s Senior Representative and Representative.
8. Page 6, Section 8.4: Fill in the Name and Contact information for the Contractor’s Senior Representative and Representative.
9. Page 6, Section 8.6: Fill in the Name and Contact information for the A/E Representative.
10. Page 6, Section 9.1.3: List any additional Agency-created Supplementary Conditions that have been approved by OSE.
11. Page 7, Section 9.1.4: List the Specification sections here or reference an attachment of the Project Manual Table of Contents.
12. Page 7, Section 9.1.5: List all of the Drawings here or reference an attachment of the Drawing List.
13. Page 7, Section 9.1.6: Fill in all information for each Addendum, if any.

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

This document is available only through the AIA DoD website. Since all the variable information completed in it is known at time of solicitation for bids, and it is beneficial to the bidders have easy access to these portions of the contract documents, the Agency may not elect to omit the original document at its discretion. Fill this document in completely on the DoD website, purchase it from AIA and insert it in the project manual where shown in the Table of Contents.

1. Page 1: Fill in the State Project Name and Number with Location and the Agency (Owner) and A/E Name and Location.
2. Page 16, Section 3.10.3: Check the box if the Agency wants a more detailed schedule as described.
3. Page 35, Section 11.1.2: The insurance requirements listed here are the minimum required by the State. The Agency should assess the risks on each project and determine if these limits should be higher. If so, they should create a modification as an attachment and reference it in Section 16.7.
4. Page 47, Section 16.1: Indicate which inspection services are required for the Project. Inspection requirements are discussed in detail in Chapter 7, paragraph 7.3 of the OSE Manual.
 - a. At the A-E’s discretion, typical inspection requirements may be inserted in Section 01400 “Quality Assurance” of the technical specifications.

- b. If this approach is taken, insert in Section 16.1 after “Remarks” a statement referring the bidder to section 01400 for typical inspection requirements.
 - c. If any inspections are required, after “Remarks”, write “All inspections provided by owner.” If no inspections are required for the project, after “Remarks”, write “No inspections required.”
5. Pages 47 & 48, Articles 16.2 through 16.6: Fill in these sections with specific project-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”.
6. Page 48, Section 16.7:
- a. Additional Agency-created Supplementary Conditions may be used with the prior approval of the OSE. If used, list them in this section.
 - b. Upon request, OSE will provide suggested wording to be included for projects involving hazardous materials.

H. SE-355 – Performance Bond

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

I. SE-357 – Labor & Material Payment Bond

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

J. SE-380 – Change Order to Construction Contract

- 1. Fill in the Agency Name.
- 2. Fill in the Project Name and Number.

K. Technical Specifications

- 1. 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.
- 2. Include in Section 01400 “Quality Assurance” with all requirements for special inspections, including a Statement of Special Inspections.