



CAI GRIE Manager's Committee luncheon

May 12, 2010

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Name Your Game – Developing Specifications

- **Resources for proposal/bid**
- **Project Budget**
 - Cost analysis, budget evaluation, Return On Investment**
- **Project timeframe - Scheduling**
 - pre-project evaluation, project time line**
- **Preparing bid packages – bid versus contract**



Pick Your Players – Finding Qualified Partners

➤ Contractor and subcontractor selection

Chamber of Commerce

Better Business Bureau

Other Organizations

CAI

BOMA

Restoration Industry Association

IICRC



Going All In – Interview Process

- **What is their reputation in the Industry?**
- **Who are their key personnel?**
- **What are their qualifications?**
- **Do they have field oversight/supervision?**
- **What insurances do they carry and what are their limits?**
- **Can they offer “Valued Engineering”?**



Seal The Deal – Binding Contract Agreement

- Contract administration – review all documents. If it is not listed in the bid/contract, **IT IS AN EXTRA**
- Walk the job one last time with the selected partner
- Contract payments – **DO NOT PAY IT FORWARD**
- Contract price retention
- Preliminary Lien Process



Sample of BID/PROPOSAL Acceptance Form

I have received, understand and accept the complete Contract Documents, including the Master Specifications, and Addenda (if any).

In submitting this bid, I agree that if I am awarded this contract, I will:

1. Enter into and execute a contract for this Bid Price.
2. Start the work upon receipt of Proceed Order.
3. I agree that once the bid is opened and Program Manager has awarded, that I will accept my bid offer unless I contact the Program Manager declining said offer within three (3) business days.

I agree to supply all labor, materials, equipment and services necessary to produce the construction outlined in the Contract Documents for the property located at

_____, including Sales Tax as applicable,

overhead and profit, for the Lump Sum Bid Price of:

_____ Dollars (\$_____)

Bid in Words

Figures

Contractor's Name

Applicant(s) Name

Address

Address

City, State, Zip Code

City, State, Zip Code

Contractor's Signature

Applicant(s) Signature(s)

Date of Bid and Proposal

Date of Acceptance

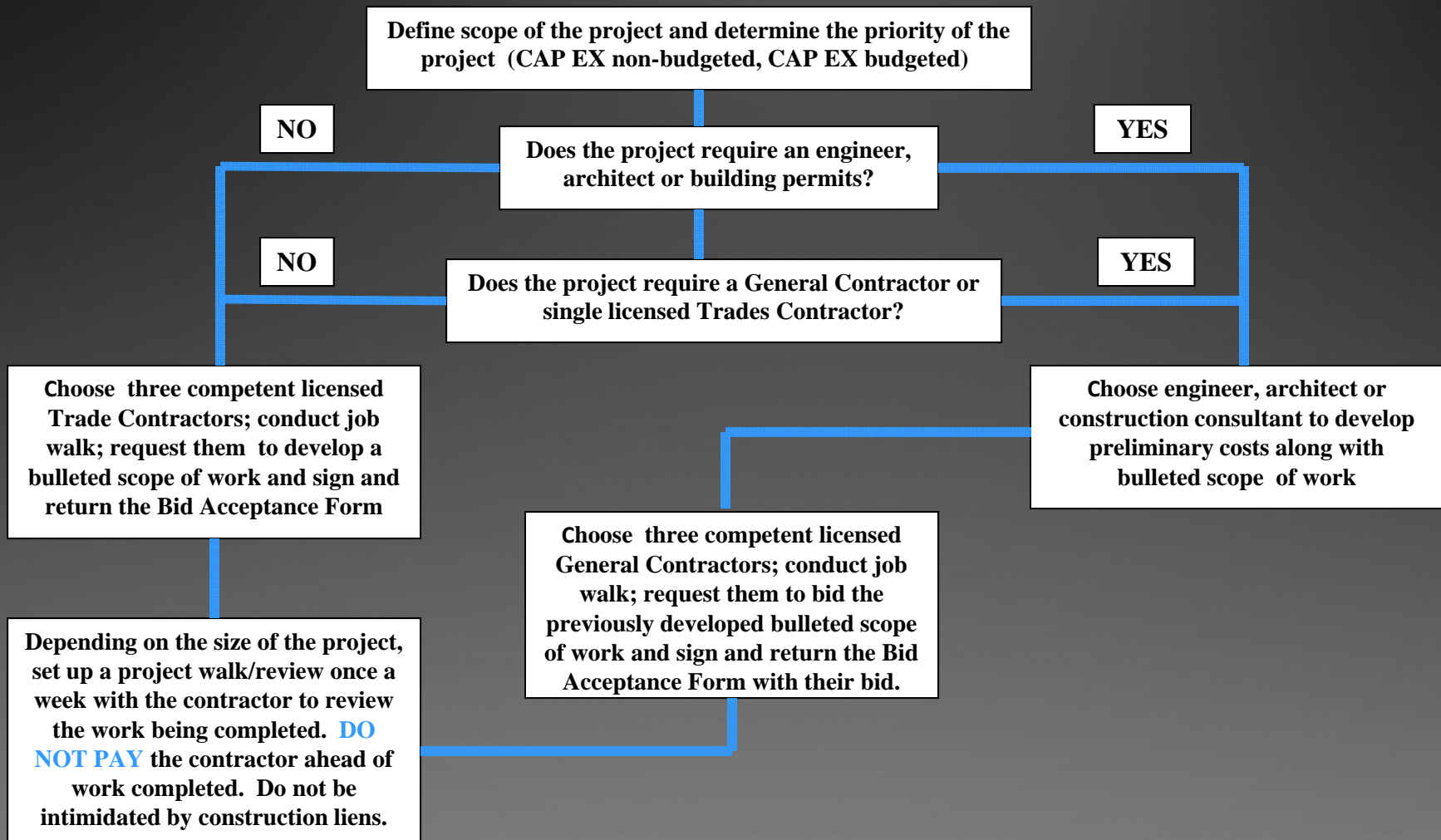
Witness

Date of Acceptance



Check Out Before Cash Out – Completion Inspection

- **Job walk to develop “final punch list”**
- **Only pay contract retention once all punch list items have been completed**
- **Liens and lien releases**





Helpful Resources/Links

- Contractors State License Board, CLSB

<http://www.cslb.ca.gov/Consumers/>

- US Department of Transportation – Federal Highway Administration

<http://www.fhwa.dot.gov/programadmin/contracts/ta508046.cfm#s3>



Construction Licenses

[\(A\) General Engineering Contractor](#)

[\(B\) General Building Contractor](#)

[\(C\) Specialty Contractor](#)

[C-2 - Insulation and Acoustical Contractor](#)

[C-4 - Boiler, Hot Water Heating and Steam Fitting Contractor](#)

[C-5 - Framing and Rough Carpentry Contractor](#)

[C-6 - Cabinet, Millwork and Finish Carpentry Contractor](#)

[C-7 - Low Voltage Systems Contractor](#)

[C-8 - Concrete Contractor](#)

[C-9 - Drywall Contractor](#)

[C10 - Electrical Contractor](#)

[C11 - Elevator Contractor](#)

[C12 - Earthwork and Paving Contractors](#)

[C13 - Fencing Contractor](#)

[C14 - Metal Roofing Contractor \[repealed\]](#)

[C15 - Flooring and Floor Covering Contractors](#)

[C16 - Fire Protection Contractor](#)

[C17 - Glazing Contractor](#)

[C20 - Warm-Air Heating, Ventilating and Air-Conditioning Contractor](#)

[C21 - Building Moving/Demolition Contractor](#)

[C23 - Ornamental Metal Contractor](#)

[C26 - Lathing Contractor \[repealed\]](#)

[C27 - Landscaping Contractor](#)

[C28 - Lock and Security Equipment Contractor](#)

[C29 - Masonry Contractor](#)

[C31 - Construction Zone Traffic Control Contractor](#)

[C32 - Parking and Highway Improvement Contractor](#)

[C33 - Painting and Decorating Contractor](#)

[C34 - Pipeline Contractor](#)

[C35 - Lathing and Plastering Contractor](#)

[C36 - Plumbing Contractor](#)

[C38 - Refrigeration Contractor](#)

[C39 - Roofing Contractor](#)

[C42 - Sanitation System Contractor](#)

[C43 - Sheet Metal Contractor](#)

[C45 - Sign Contractor](#)

[C46 - Solar Contractor](#)

[C47 - General Manufactured Housing Contractor](#)

[C50 - Reinforcing Steel Contractor](#)

[C51 - Structural Steel Contractor](#)

[C53 - Swimming Pool Contractor](#)

[C54 - Ceramic and Mosaic Tile Contractor](#)

[C55 - Water Conditioning Contractor](#)

[C57 - Water Well Drilling Contractor](#)

[C60 - Welding Contractor](#)

[C61 - Limited Specialty](#)

[ASB - Asbestos Certification](#)

[HAZ - Hazardous Substance Removal Certification](#)

[HIC - Home Improvement Certification \[repealed\]](#)



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Questions??

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