



Bidding, Part II: Reviewing the Specs & Plans

by Sal Alfano

The spec book, or "bible" as it is sometimes called, is—along with the plans—the focus of any bid, and should be read cover to cover.

The spec book contains three kinds of information. The first pertains primarily to quantity take-off: 2x4 studs or 2x6? 16 or 24 inches o.c.? 3/8 or 1/2-inch underlayment? The second describes special measures that may be required: for example, cold-weather concrete procedures.

Special work conditions can be costly. How much you charge for them will reflect both their true added costs and how much you can charge and remain competitive. If you omit some of these costs, it should be an informed decision, not an oversight.

The third kind of information concerns administrative matters, including the bid procedure itself, and these should be scrutinized carefully. Two bid requirements that often cause last-minute headaches are documents that need to be notarized, such as non-collusion affidavits, and project schedules. The former is easily handled as long as you notice it early enough. The latter, which is often incorporated directly into the contract documents, can have serious consequences down the road. For example, many contracts include penalties for failure to complete on time. A bid that includes a schedule that is hastily thrown together is a bid you may live to regret. So carefully read the specs, and note these kinds of requirements so you can evaluate and plan for them.

The specs may also contain information about general administrative matters that may require you to change your normal routine. Liability-insurance minimum coverages may exceed your current insurance, and you'll need to include the increased premiums in your overhead for the job. You may be required to obtain and pay for certain permits and licenses, or prepare elaborate shop drawings and operating manuals for systems equipment. All of these generate expenses that should be included in your bid price.

The Plans

Like the specs, the plans are there to ensure that everyone bids on the same building. It's difficult enough to notice every piece of information that's on the drawings, but it's harder still to anticipate costs for work that is hidden or not explicitly stated.

The site plan is one place to watch for this. Is there enough space on the site to store construction materials, park cars and trucks, and still give the excavator room to operate heavy equipment? Will the dozer ruin an existing lawn? Can the concrete truck clear the overhead power lines? Is there an elementary school next door, or will you need barricades to keep the curious out of your way?

Another factor you have to evaluate is how complete the plans

are. Are all of the important dimensions provided, or will your crews be scratching their heads on company time while trying to figure out how long the studs are? Are there enough detail cut sheets so that multiple levels or complex intersections can be clearly interpreted? If not, will the architects provide details as needed—and at whose expense? And do the details "hide" anything? In other words, does a sectional drawing make a particular construction detail appear simpler than it really is?

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Often there are discrepancies between drawings: a plan view shows a window in a certain location; an elevation shows it in a different location. Generally, contradictions are resolved by following the spec book over the plans, and the larger-scale drawings over the smaller-scale drawings.

But don't make guesses. Anything that's ambiguous must be clarified by the architect. Discretion is the best tactic here, especially if it's an outright mistake. Most architects will admit to an error if approached with tact and gentle persuasion.

If the problem is important enough, an addendum that resolves the matter will be issued to all bidders. Receipt of addenda must be acknowledged in the space provided on the bid form. Pay attention to the addenda, and make a checklist for the items they contain. Remember, you aren't the only one bringing questions to the architects, and your bid is assumed to include all of the information the various addenda provide.

Finally, keep an eye out for certain words and phrases. The specs and plans will probably include a phrase like "provide Schlage A-series locksets or equal." Watch out. What is "equal" is usually determined by the architects—and the architects only. Find out before you submit your bid if your substitution is acceptable, and look for other approved substitutions in the addenda.

Another troublemaker is the word "typical." Some plans are sprinkled with little notes describing various portions of the building as "typical." This means the architect has thought through this particular detail once, then generalized it to include similar details through the plans. In reality, though, they're rarely identical, and

sometimes aren't even close. When you see the word "typical," scour the plans for every possible occurrence of the detail and think each one through. You can't afford to assume anything.

Two other phrases will bite you if you aren't careful: "as needed" and "match existing." Both are primarily found in projects that require some renovation of an existing structure, and that usually means a site inspection. Each use of these phrases, along with the others already mentioned, should be put on a separate list and checked off one by one during the site visit. This is usually the only opportunity you'll get to inspect existing conditions, so make the most of it.

Back to our troublesome phrases. In order to "match existing" conditions, you have to know what they are and determine if it's possible to match them. If an existing trim has to be duplicated, it may require special milling and extra labor. If you need to match materials like roofing, which varies from bundle to bundle and may be discontinued by the manufacturer, find out how close the match must be, and what alternatives are available if an acceptable match isn't possible. Again, the answer may turn up in an addendum.

"As needed" is perhaps the most insidious phrase of all, since it's entirely a judgment call. I've looked at plans that said "patch roof shingles as needed" when there was two feet of snow on the roof and no way to discover how much patching was needed. In this particular instance, I asked for an allowance for roof patching—and got it—but that still didn't work because the architects didn't provide the price of the allowance. Each bidder still had to supply a lump sum, so I submitted a price-per-square allowance and hoped for the best.

You don't have to study too many sets of prints before you realize that most bids are full of these ambiguities and annoyances—some little, some substantial. Pay close attention to them, because they can cost you money. ■

Sal Alfano is a general contractor from East Calais, Vt.