

# Cedar Rapids Public Works Department Standard Operating Procedure



<b>Procedure Name:</b> Bid Documents		<b>Approved By:</b> Doug Wilson	
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<b>Date Revised or Reviewed:</b> 05/27/2021	<b>Revised or Reviewed by:</b> Jennifer Selby/Nick Kariya	<b>Approved By:</b> Doug Wilson	
<b>Published Locations (manuals/websites/etc.):</b> Project Development and Management Manual – <b>After any revisions to this document, replace the obsolete version stored on <a href="#">this webpage</a></b>			

**Purpose:**

To summarize and document the process to prepare print documents for the bid letting.

**Procedures:**








The Designer is responsible for submitting bid documents to the Project Manager at least two weeks prior to the City Council meeting at which they will be filed. A list of the items that will be submitted is included in the Bid Docs Checklist tab in the Project Development Guide (PDG).

Refer to template – [Project Development Guide](#)

The following procedures are performed by the City Project Manager (PM) and/or an Administrative Assistant, after receipt of the documents from the Designer.

**Set up Construction Project Files – Project Manager**

1. When the bid documents are submitted, the PM shall set up the construction project files utilizing the standard file structure.
  
2. The folders are set up at PWEng > CONSTRUCTION > CONTRACT ADMINISTRATION > FOLDER STRUCTURE

Name	Date modified	Type	Size
 CONTRACT	7/9/2020 2:33 PM	File folder	
 CORRESPONDENCE	7/9/2020 2:35 PM	File folder	
 COUNCIL DOCS	7/9/2020 2:29 PM	File folder	
 INSPECTION	12/10/2020 1:46 PM	File folder	
 PERMITS	7/9/2020 2:22 PM	File folder	
 PROJECT MANGEMENT	7/9/2020 3:52 PM	File folder	
 PROJECT MANUAL	7/9/2020 2:29 PM	File folder	

3. The PM shall copy and paste the entire folder structure into the project folder.

### Save Bid Documents – Project Manager

All bid documents will be saved in the PROJECT MANUAL subfolder of the project folder, unless otherwise noted.

1. The final Project Development Guide shall be saved as “[Contract No] PDG FINAL”.
  - a. The Recommendation to File (RTF) shall be saved as a file separate from the PDG.
    - i. When the Recommendation to File has been approved, open a copy of the final PDG and save as “[Contract No] Rec to File”.
    - ii. Go to the Rec to File tab and copy all information contained within a cell that is linked from another tab and paste the information as text.
    - iii. Delete all other tabs.
    - iv. Save
  - b. The Project Manual Form Sign-Off Sheet shall be distributed for signatures.
    - i. The PM shall sign and date as “Reviewed by” under “Project Manager Approval” as well as “Submitted by” under “Program Manager Approval”. Follow the instructions for digitally signing.
    - ii. The PM shall review the project details with their Program Manager and, if they agree that the project can proceed, email a link to the PDG to their Program Manager.
    - iii. The Program Manager shall sign and date as “Reviewed by” and “Approved” under “Program Manager Approval” and notify the PM that it has been approved.
    - iv. If right-of-way was acquired on this project, the PM shall obtain the signature of the Real Estate Services Manager. Complete the PMF with the number and types of acquisitions, sign and date as “By” under “Certification by Real Estate Manager” and email a link to the PDG to the Real Estate Services Manager.

- v. Lastly, the PM will sign and date the “Submitted by” under “Public Works Financial Analyst Approval” and provide to the Public Works Financial Analyst, along with the Recommendation to File, for their approval. If there are utility funds in the project, the Public Works Financial Analyst will coordinate approval from the Utility Analyst.
  - vi. The Sign-Off Sheet will remain a tab in the PDG – a separate file is not needed.
- c. The 300-A Reference tab, shall be saved as a file separate from the PDG.
    - i. Instructions for creating this document can be found in the tab.
    - ii. The Designer should have created the sheet from the EOPC prior to submitting bid documents.
    - iii. The Project Manager should create the separate file. Note that the document must be saved as an “Excel” workbook, not an “Excel Macro-Enabled” workbook.
  - d. IonWave Importer shall remain a tab in the PDG
    - i. Instructions for creating this document can be found in the tab.
    - ii. The Designer should have created the sheet from the EOPC prior to submitting bid documents.
    - iii. The Administrative Assistant will utilize the information in this tab to list the project on IonWave.
2. The project manual shall be saved as “[Contract No] Project Manual Final for Printing” in both Word and pdf format.
- a. Extract Section 00100, Notice to Bidders, from the Word document, delete any headers and/or footers, and save the document in both Word and pdf format as “[Contract No] Notice to Bidders”.
  - b. Extract Section 00110, Notice of Public Hearing, from the Word document, delete any headers and/or footers, and save the document in Word format as “[Contract No] Notice of Public Hearing”.
  - c. Extract Section 00410, Bidder Status Form, from the pdf document, and save the document as “[Contract No] Bidder Status Form”.
  - d. Extract Section 00430, Bid Bond, from the pdf document and save the document as “[Contract No] Bid Bond Form”.
  - e. The electronically signed and sealed Section 00005 (separate from the Project Manual) shall be saved as “[Contract No] 00005 Certifications”.

Refer to template – [Project Manual Front End Documents](#)

3. The sealed, not signed plans shall be saved as “[Contract No] Plans Final for Printing”.
- a. The electronically signed and sealed plan cover sheet shall be saved as “[Contract No] Plan Cover Sheet Signed and Sealed”.
  - b. A copy of the sealed, not signed plans shall also be saved as “[Project No] YYYYMMDD CURRENT PLANS.pdf” in the CONTRACT > DESIGN UPDATES folder.

### **Assemble Bid Documents for IonWave and the Publisher – Admin**

1. Check that all documents are reasonably free of spelling and grammatical problems, that the information contained in the documents matches the Project Development Guide, and all pages are numbered and formatted correctly.
2. Extract the cover sheet from “Project Manual Final for Printing” in pdf format and distribute to City Engineer, Utilities Engineer, and Traffic Engineer for electronic signatures. Re-insert into the “Project Manual Final for Printing” and save.
3. Extract the sealed, not signed cover sheet from “Plans Final for Printing” and distribute to City Engineer, Utilities Engineer, and Traffic Engineer for electronic signatures. Re-insert into the “Plans Final for Printing” and save.
4. Create a [Plan Holders List](#). Enter information specific for the project and delete any extra rows after the plan rooms. Save the document in both pdf and Word format as “[Contract No] Internal Plan Holders List\_Bids MM.DD.YY” in the PROJECT MANUAL subfolder as well as in the [Plan Holders folder](#) (link only works for City staff; requires read permissions for PWAdmin drive).
5. Obtain signatures from the City Engineer, Utilities Engineer, and Traffic Engineer on the “Plan Cover Sheet Signed and Sealed” and save as “[Contract No] Plan Cover Sheet Signed by All”. This plan cover sheet and the electronically signed and sealed “00005 Certifications” will be inserted into hard copies from the publisher.