

ROLLEASE ACMEDA CONTRACT

Commercial Bidding Process

Installation/Closeout

GENERAL

The commercial bidding process is a well-defined path of positioning oneself to be the successful bidder amongst a group purporting to offer the same quality materials and labor. There are certain do's and don'ts...a chain of command that is rarely broken, and only with certain permission...to define a product or products that meets or exceeds compliance with an architect's written specification and drawing details. In the case of bidding within the commercial fabric roller shade arena, the process begins as follows:

1.1 THE ARCHITECT'S SPECIFICATIONS AND DRAWINGS

- a. The Specification Writer or Architect selects a shading specification from their in-house library of previous work, or utilizes the talents of specification writing firms to compile overall specifications to include in the book of specifications – Contract Documents.
- b. The selected specification is not necessarily a truly-devoted dissertation of what is exactly required for the project, as definitive components or fabrics are sometimes overlooked due to time constraints or more pressing issues of other trades.
- c. When the full set of Specifications are assembled, along the same time frame as the full set of Contract Drawings: Site Work, Excavating, Demolition, Architectural, Structural, Civil, Landscape, Mechanical, Plumbing, Electrical, etc., this entire package – Drawings and Specs is put out to bid via Plan Rooms, Construction Reporting Services, municipalities, etc., with specific dates for site visits and bidding deadlines.

1.2 THE BIDDING CONTRACTORS

- a. General Contractors, as well as various single trades at times (concrete, electrical, window treatments - and there can be twenty or more trades involved in some projects) review the offerings of these construction reporting services and choose to bid on projects that they feel they can be successful in.
- b. General Contractors make their intentions known to bid via a formal written request for Contract Documents, made through an Owner's agent or Construction Management firm running the bidding process. These Contract Documents are all of the drawings, photos of existing conditions if applicable, and the entire book of project specifications that define not only the components of the project but the legal Conditions under which a General Contractor must submit a bid for the entire project – with qualifications of finances and experience to perform the work satisfactorily.
- c. As the bidding Contractors review the general specification headings for trades required in the project, they also start a preliminary take-off of large trades like concrete, roofing, and drywall to get an estimate or range and what the project entails.

ROLLEASE ACMEDA CONTRACT

Commercial Bidding Process

Installation/Closeout

- d. As there are many trades to deal with, the Bidding Contractors issue a *Request for Quote* – an “**RFQ**” – to subcontractors, asking them to review the Contract Drawings and Specifications for their particular trade and to submit their all-inclusive pricing for their trade’s materials – Furnished and Installed. In the case of fabric roller shades there may be manual shades only, or manual and motorized in the same project. Several bidding Contractors can solicit bids, via an RFQ from each trade, in order to have a Scope of Work defined, as the subcontractors see it.

1.3 THE RFQ AND THE BID

- a. The shading subcontractors who were contacted by the bidding General Contractors have a certain time frame in which to establish quantity and sizes as noted in the drawings, or schedules, for shades - plus any clarification or value-engineering notes, or recommendations, to substantiate differences in their quotes from that which is scheduled. It is to the shading sub-contractor’s advantage to read the specs carefully for any printed anomalies or components that are specified but are not in the project, and to scrutinize the drawing details to advise the bidding Contractors of any impending issues early in the process. Scrutiny on the part of the shading sub-contractor / bidder carries a no-cost added value to the quote, as it brings attention to the expertise of the bidder and defines their quote as more than merely the norm. “Alternate ADD”s, “Alternate DEDUCT”s, and “Exclusions” can also be included in a bidder’s quote to make recommendations for systems which may suit the project more efficiently.
- b. The shading sub-contractors finished quote – with material pricing, freight costs, installation labor costs, profit and overhead percentages, and taxes (if applicable) – is a total of the entire shading system project as the architect has designed it and specified it – with the shading sub-contractor’s notes and qualifications to the bid.
- c. The finished quote is then formally prepared on a PROPOSAL format, stating that [shading sub-contractor] proposes to furnish and install the following shading systems, per the following:
 - a. Ref: Specification Section [12 24 13] [12490] [spec sub-division number listed]
 - b. Description of the system and manufacturer
 - c. Quantities and sizes (not necessarily required to list all sizes on a very large project)
 - d. Notes, alternates, exclusions
 - e. FURNISHED and INSTALLED - taxes included or not included

When the shading sub-contractor’s quote is finalized, put in Proposal format, signed, and dated, it is then transmitted to the bidding General Contractors.

ROLLEASE ACMEDA CONTRACT

Commercial Bidding Process

Installation/Closeout

The bidding General Contractors compile all the sub-contractor's bids, plus use their own experienced quoting abilities to analyze the sub's bids for advantages to assist them in securing the lowest Contractor bid, and the overall complete project's bid, by the bidding General Contractor, is sent to the Owner's Rep or the Architect or the Construction Manager, or the firm who is handling the Bid Opening.

1.4 THE BID OPENING AND THE AWARD

- a. All GC's (General Contractor's) bids are collected and read aloud, publicly, in a room designated for the Bid Opening. Public, Municipality, Government, and most other projects to be bid, as a whole, require three (3) GC bidders MINIMUM. There can be twenty / thirty / forty different GC bids on large projects.
- b. The GC bids are read aloud and recorded, analyzed at the end of all-bids-opened for the lowest bidder, the second-lowest, and the third-lowest. The low three bidders are then directed make a formal submission of their qualifications – financial and experience – to the Architect / Owner, if the General Conditions of the Specifications do not dictate that pre-qualification is required before bid opening.
- c. The Low Bidders project bids are scrutinized for accuracy to encompass the entire project's Scope of Work – this sometimes takes weeks to analyze - and if they are qualified in the eyes of the architect and Owner, the Low Bidder is Awarded the project. Being the Low Bidder does not assure a company of securing the AWARD, as mistakes in the bid, omissions, non-compliance with project requirements, etc., could disqualify a low bid – the architect / Owner then goes on to Company Number 2 to qualify them. This process continues until a suitable General Contractor is decided upon.
- d. When a General Contractor is Awarded the project, there are the legalities of contractual obligations to be met by them, as well as putting together the team in the GC's office to handle the project from inception to finish – Project Managers, Field Superintendents, inside review personnel, coordinators, etc.
- e. When all the formalities are completed between the Architect / Owner and the GC, the GC now has the responsibility to set calendar dates – “Critical Path” – for sub-contractors to perform their work in a correct and timely manner.
- f. There is a sequence for the GC to establish the work sequence – defined by the Divisions of the Specifications: Division 2 through Division 16 (some large projects can expand to Divisions 23 or 27, or more, as required). Division 2 generally indicates the excavation and / or demolition required to initiate the project – the subsequent Specification Divisions put the project's construction in the most valid sequence, i.e., doors and windows (Division 8) do not start before walls or roof are erected (Division 4

ROLLESE ACMEDA CONTRACT

Commercial Bidding Process

Installation/Closeout

Masonry / Division 5 Structural Steel / Division 6 Rough Carpentry). Shading systems – Division 12 Furnishings – are typically installed after most-to-all trades have finished their work: in the case of motorized shades, Division 12's shades installations are performed after Division 16's electrical work is complete.

- g. Once the Critical Path is established, the GC starts to “buy out” the trades most critical to their time line – some GC's will “buy out” the entire project from sub-contractors as soon as possible to get that phase out of the way and all their sub-contractors on board. Shading Systems are not a critical purchase, thus there could be an extended period of time between the shading sub-contractor's Proposal date and the actual “buy out” by the GC.
- h. When the shading system's Proposals from the sub-contractors are ready to be analyzed by the GC – as is the system with all sub-trades – a purchaser in the GC's office will decipher, scrutinize, and decide on whose shading Proposal is the lowest – but more importantly - the most valid. As with the GC's project bids to the Owner, shading system proposals carry the same anomalies at times of omissions, incorrect Scope, etc., and need to be qualified. The GC will contact the low bidder on shades to offer the shading contract “Per Plans and Specs” – a term that defines that the successful shading sub-contractor shall perform the full extent of the work per the Contract documents at the Proposal price – mistakes in their Proposal or not. It is a fine line for some Contractors to entrust a subcontractor with “Per Plans and Specs” when their Proposal may be lacking the definitive descriptions necessary to insure that the COMPLETE Scope of Work is included. In most cases the GC will attempt to obtain a revised LOWER price for the Scope of Work than originally submitted by the sub-contractor in order gain a better financial position in the project.
- i. When analysis and negotiations are completed between the GC and the shading sub-contractor who has bid the Scope of Work and has agreed to a revised total Furnished and Installed price, the GC offers the sub-contractor a Purchase Order (or perhaps a Letter of Intent on a large project until the appropriate Purchase Order agreement can be generated). If it is accepted, in the terms agreed to between the shading contractor and the GC, it is now a contractual obligation to begin the process of Submittals for Approval.

1.5 SHADING SUB-CONTRACTOR'S SUBMITTALS FOR APPROVAL

- a. The Specifications for the shading systems delineate the required submittal data, drawings, certifications, samples, etc., for the Architect's, and the Owner's, approval. No work can proceed – by any trade – without prior approval. It is the shading contractor's responsibility to compile the required information to ultimately transmit to the GC for their review, and then that information – if acceptable to the GC – gets transmitted to the Architect for additional review and ultimate Approval.

ROLLEASE ACMEDA CONTRACT

Commercial Bidding Process

Installation/Closeout

- b. The initial shading sub-contractor's Proposal could have been based upon the "manufacturers" listed in PART 2, PRODUCTS, A., ACCEPTABLE MANUFACTURERS in the specifications. Although it is advantageous to bid those shading companies listed in the specs, it also advantageous to bid alternate companies whose offerings give an edge to the shading bidder – but, most importantly, that are compliant to the specs. Substitutions of a shading company's products in lieu of the specified "manufacturers" requires, in some cases, a formal Substitution Form submittal to explain and assure the Architect that the substituted company's products: components, operating systems, fabrics, etc., meet or exceed those which are specified in the Contract Documents.
- c. The GC has offered the shading contractor a Purchase Order based upon the contractor's supplier company, system, components, fabric that the shading contractor felt the most advantageous to their success. If that system / fabric / components are not among the "manufacturers" listed in the specs, it may take a formal meeting with the GC – and ultimately the Architect – to present the systems that the shading contractor proposes to provide. This process could start with a simple Substitution Form and culminate in a formal presentation to the Architect, which has its ultimate, and perpetual advantage of getting the substituted Company permanently listed in the Architect's future shading specification.
- d. Upon the Architect's acceptance of the substituted product, the GC then formally requests the Submission requirements of the Specifications, which may comprise itself of several data submissions along with drawings for Approval. These submissions are reviewed, questioned, corrected, and could be stamped "Revise and Resubmit" – which requires corrections to be made to drawings or data and sent back to the GC / Architect for final review and Approval; "Approved as Noted" – the Architect approves but has included notes or comments to be followed; or "Approved".
- e. These reviewed shading submittals are transmitted back to the shading contractor and communications with the GC turn to "time frame" for manufacturing / production lead times, other trades work on site, and field measurements.

1.6 FIELD WORK

- a. With product approvals and any drawings submitted now secured, the focus shifts to all that has to be coordinated in the field – at each window opening – to insure that the correct supports are in place, as delineated on the drawings for Approval and that there are no obstructions or difficulties to hamper the shades' installations. Mounting conditions for brackets have been previously addressed via the shading contractor's Approval submission: the Architect and the GC are aware of the requirements for proper and adequately-placed supports, as well as conflicts with ceiling construction, window frames, etc.

ROLLEASE ACMEDA CONTRACT

Commercial Bidding Process

Installation/Closeout

- b. Once it is determined that the substrates are correct and the window openings are completed, the shading contractor is responsible to field measure every window to receive a shade. The GC does not take responsibility for fabrication dimensions, and that is spelled out in the shading contractors Purchase Order.
- c. Upon completion of field measurements, the coordination of time for shade fabrication, and the installations, becomes critical, as – by this time – there is substantial completion by other trades in the interiors of the building. It is imperative that all trades be completed at the windows so the shades can be installed after finish paint is dry, unless there are ceiling attachments required to be performed by the ceiling contractor or other trade’s work that must follow after the shades.

1.7 COMPLETION

- a. Completion of the project: shades’ fabrication, shipping, installation are performed within the time guidelines (hopefully) of the GC’s “Critical Path”. Once the installation is complete, the shades are inspected via “punch list” for any anomalies that the GC and the Architect might uncover. Any “punch list” items must be remedied at no cost to the Owner / Architect and are subject to additional review to have Final Approval.
- b. When the Architect / Owner and the GC deem the shades to be in working order, per the Contract documents, the Specifications may denote Closeout data – Maintenance Manuals – to be submitted to the Owner before final payment is made to the GC, and then to the shading contractor. These Manuals can consist of layout drawings, installation instructions, fabric cleaning instructions, etc. If Maintenance Manuals are required, it is the final closeout submission to complete the project.
- c. With the Owner’s acceptance of Maintenance Manuals (if required), the project is complete – with final payments anticipated by the shading contractor. Future remedial work or repairs are a separate Contract between parties.