

Consideration	N/A	✓	Notes
<p>The activities of item 1. occur continuously throughout the project. They are inserted here and at the beginning of each phase as a reminder. The beginning of each phase is always a good time for a team update and reminder about basic communications.</p>			
<p>1. Review:</p>			
<p>.1 Scope of work for this phase with stakeholders:</p>			
<ul style="list-style-type: none"> <li>• client;</li> </ul>			
<ul style="list-style-type: none"> <li>• project team, including consultants.</li> </ul>			
<p>.2 Update risk register:</p>			
<ul style="list-style-type: none"> <li>• identify and analyze project risks on a regular basis;</li> </ul>			
<ul style="list-style-type: none"> <li>• implement risk strategies to address project uncertainty;</li> </ul>			
<ul style="list-style-type: none"> <li>• review unresolved risks whenever new team members are added and/or a new project phase is started.</li> </ul>			
<p>.3 Keep design coordination meeting notes:</p>			
<ul style="list-style-type: none"> <li>• identify issues and their resolution;</li> </ul>			
<ul style="list-style-type: none"> <li>• distribute to all project team members.</li> </ul>			
<p>.4 Identify additional services as required during this phase:</p>			
<ul style="list-style-type: none"> <li>• obtain client agreement as to services and remuneration before executing.</li> </ul>			
<p>2. Opening of proposals/quotes received from construction contractors:</p>			
<p>.1 Assist the client in publishing the advertisement for bids. If separate contracts are to be awarded, separate advertisements may be necessary.</p>			
<p>.2 Obtain qualification statements from interested bidders and review.</p>			
<p>3. For invited bidding:</p>			
<p>.1 Notify selected bidders.</p>			
<p>4. For direct selection:</p>			
<p>.1 Assist the client in selection as requested.</p>			
<p>5. Determine number of sets of bid documents required and order same.</p>			

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.1 Review client-architect agreement for agreed-upon number of sets (if applicable).			
6. Distribute documents to bidders and obtain deposits.			
7. Issue documents to local construction association for viewing in plan rooms or online where such facilities are available.			
8. Hold pre-bid meeting and site tour as required.			
9. Record, resolve and respond to all bid document inquiries.			
10. Prepare and issue addenda as necessary. Ensure that the bidders have a reasonable amount of time to review prior to bid closing.			
11. Return deposit to bidders who withdraw upon satisfactory return of bid documents.			
12. Return deposit to disqualified bidders upon satisfactory return of bid documents.			
13. Receive, open, tabulate and analyze bids as per procedure established with the client and in the bid documents. Obtain assistance of consultants as required.			
14. Advise the client on selection of alternatives, separate prices.			
.1 Review bids and analysis with the client.			
.2 Obtain the client's instructions.			
15. Prepare bidders report for client indicating compliant and non-compliant submissions and amounts of bids.			
.1 Recommend client have bids reviewed by legal counsel.			
16. Following confirmation from client, notify successful bidder of acceptance and basis of acceptance.			
17. Update project directory.			
18. Assist the client in issuing letter of intent if contract cannot be executed immediately.			
19. Notify unsuccessful bidders and obtain return of bid documents.			
20. Return unsuccessful bidders' deposits upon satisfactory return of bid documents. (Retain bid deposit of lowest bidders until contract signing.)			

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21. Request and receive submission of post-bid information:			
<ul style="list-style-type: none"> <li>• performance bond</li> </ul>			
<ul style="list-style-type: none"> <li>• labour and material payment bond</li> </ul>			
<ul style="list-style-type: none"> <li>• insurance certificates</li> </ul>			
<ul style="list-style-type: none"> <li>• workers' compensation</li> </ul>			
<ul style="list-style-type: none"> <li>• other</li> </ul>			
22. Prepare or assist the client's legal counsel in preparation of construction contract. If separate contracts are awarded, obtain assistance of consultants as required.			
23. Assist the client and contractor in execution of the construction contract.			