

# **Pre-Bid Review Control Sheet (PRCS)**

## DOCUMENT CHECK LIST

- Budget Concurrence Memo
- DBE Goal (if applicable)
- Contract Time Determination (CTD) Schedule
- Specialties Memo
- Allowance Approval
- Engineer's Estimate (hard copy and electronic version)
- Signed Force Account and/or PI Agreements
- Copy of Section 01590-Field Office and Sheds
- Dummy Staff Summary or Exhibit 3-4 as applicable
- Slide Deck -PowerPoint(if applicable)
- Wayfinding approval (if applicable)
- Real Estate concurrence
- Bid Escrow
- Liquidated Damages calculations
- Value Engineering report or waiver
- Risk Analysis or waiver
- Constructability Review or waiver
- Risk Manager concurrence
- Building Permits
- Paint systems approval
- Table of Contents
- ADA conformance (if applicable)
- Systemwide Accessibility approval of 100% review
- Consultant Environmental Permitting Status Letter
- Environmental Checklist

**Prebid Review Control Sheet  
(PRCS)**

To be completed, signed and submitted to Contract Documents Coordinator with review copy of Specifications and Final Estimate. Review copy is to be bound in such a manner to facilitate removal and/or insertion of pages. Insert **N/A** (not applicable) where appropriate in items below.

1. MBTA Contract No.: \_\_\_\_\_  
Contract Specifications Title: \_\_\_\_\_  
Scope of Work \_\_\_\_\_
  
2. a. FTA Project No.: \_\_\_\_\_ Grant No. \_\_\_\_\_ Other \_\_\_\_\_  
b. FTA Project Title: \_\_\_\_\_
  
3. Designer's Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Individual to Contact: \_\_\_\_\_  
Professional Service Contract No. \_\_\_\_\_  
Phone No. \_\_\_\_\_ Email \_\_\_\_\_
  
4. Designee of the General Manager: \_\_\_\_\_  
AGM of Capital Delivery  
Project Manager: \_\_\_\_\_  
Phone No. \_\_\_\_\_ Email \_\_\_\_\_

# BUDGET

5. Estimated Construction Cost \_\_\_\_\_ \*

**If any of the information in question 5 is cannot be provided, the Project Manager must provide a waiver from the AGM for Capital Delivery.**

|                                   |       |
|-----------------------------------|-------|
| Design                            | _____ |
| Construction                      | _____ |
| Real Estate                       | _____ |
| Force Account                     | _____ |
| Project Administration/Inspection | _____ |
| <b>Total Project Budget Cost</b>  | _____ |

a. Funds Available \_\_\_\_\_ (Attach concurrence memo from Director of Budget)

\* If the Construction Estimate is **\$1,000,000 or over**, the Bidding Documents (Bid Form) must include prequalification paragraphs, project value, and Class of Work. Class of Work recommended must be approved by Contract Administration.

6. a. Source of Funds: (Insert CMS Work Order No. ) \_\_\_\_\_

FTA \_\_\_\_\_ BOND \_\_\_\_\_ MASSDOT \_\_\_\_\_ OTHER \_\_\_\_\_

b. Source of Funds for **Printing and Advertisement of NTB: (different from source of funds work order No.)**

Area No. \_\_\_\_\_ Account No. \_\_\_\_\_

Center No. \_\_\_\_\_ **Active Work Order No.** \_\_\_\_\_

# CONTRACT ADMINISTRATION

7. **Method of Procurement (See Decision Matrix attached)**

|                  |                |       |
|------------------|----------------|-------|
| Design Bid Build | Sole Source    |       |
| Micro Purchase   | Small Purchase | Other |

8. Desired **advertising period** (minimum - 30 days) \_\_\_\_\_

a. If less than 30-days are desired, the Project Manager must notify Organizational Diversity. Copy of notification must be submitted to Contract Administration.

b. Proposed Construction Starting Date: \_\_\_\_\_ Completion Date: \_\_\_\_\_

**Include Contract Time Determination Schedule** YES N/A NO

9. Ensure that the contract documents do not contain **restrictive provisions** pertaining to the experience and responsibility of the bidders. \_\_\_\_\_



# Method of Procurement Decision Matrix

Determine suitable procurement method by checking appropriate boxes. All elements must apply to use that method. The planned type of contract can be added to this checklist.

## Micro Purchase

- Amount <\$3,000
- Multiple Sources

**Small Purchase** Amount <\$150,000 (<\$100,00 if executed prior to Super Circular)

- Complete and Adequate Specification or Description
- Two or More Quotes Available

## Sole Source

- Approved by FTA
- OEM, Custom Item OR
- Only One Source OR
- Competition Inadequate after Solicitation OR
- Emergency / Public Exigency

## Competitive Procurement

- Amount >\$3,000
- Multiple Sources
- Not an Emergency

## Sealed Bid (IFB) Amount >\$150,000

(>\$100,000 if executed prior to Super Circular)

- Complete and Adequate Specification or Description
- Two or More Responsible Bidders willing to Compete
- Selection can be Made on Basis of Price Alone
- Firm Fixed Price Contract is used
- No Discussion with Bidders Required After Receipt of Bids

## Competitive Proposals (RFP) >\$150,000

(>\$100,000 if executed prior to Super Circular)

- Complete Specifications Not Feasible
- Proposer input Needed
- Two or More Responsible Proposers willing to Compete
- Discussion Needed with Proposers After Proposals Received
- Fixed Price can be Set After Discussions OR a Cost Reimbursement Contract is Determined

Prepared By: \_\_\_\_\_

Date: \_\_\_\_\_

- 10. If station contract is in **excess of \$10 million** have alternative contracting methods been considered? \_\_\_\_
  
- 11. Does each product listed in technical specifications provide for a minimum of **three equal named brands** or a description of material that can be met by a minimum of three manufacturers or producers? (see General Conditions, 00700 Articles 4.01) \_\_\_\_
  - a. If not, the Project must justify, in writing, and obtain the **AGM of Capital Delivery's approval.**

**FEDERAL TRANSIT ADMINISTRATION**

- 12. If this project is **FTA Funded**, has the project office verified that all applicable federal provisions are incorporated into the contract documents. (Specification Sections 00800F-Supplementary Conditions provided by Contract Administration) \_\_\_\_
  
- 13. Has latest provisions of Standard Federal EEO Specifications with **Appendices Nos. 1, 2 and 3** been incorporated in Supplementary Conditions? \_\_\_\_
  
- 14. Project Managers must furnish data to the Office of Organizational Diversity for establishment of DBE goal. **MMU-15.3%, FMU-6.9% and DBE, MUST be available prior to advertising.** \_\_\_\_

**PROJECT MANAGEMENT**

- 15. Has the Designer designated **specialty items** which may be performed by subcontract? (Article 6.01 - subletting or assignment of Contract) \_\_\_\_
  
- 16. If authority-furnished materials are required, has sufficient, **long-range procurement** planning taken place? \_\_\_\_
  
- 17. If contract provides for **revenue producing construction** costs (concession shells), are separate items included? \_\_\_\_
  - a. If yes, the Project must submit to Contract Administration, a **signed letter** confirming that the concession plans and Specifications comply with Massachusetts Department of Health Standards.

|     |  | YES | N/A | NO  |
|-----|--|-----|-----|-----|
| 18. | Is <b>other Authority construction</b> work under way in the vicinity of this contract or presently planned to be under way during the duration of this work?      | ___ | ___ | ___ |
|     | a. If yes, please list, by name or project number, other Authority construction under way in the vicinity:   |     |     |     |
| 19. | Are <b>Allowances</b> to be incorporated in the bidding documents?   | ___ | ___ | ___ |
|     | a. If yes, the Project Manager must attach a <b>letter of approval</b> signed by the AGM of Capital Delivery.  |     |     |     |
| 20. | Has detailed <b>Engineering Estimate</b> of Bid Prices been attached?  | ___ | ___ | ___ |
|     | a. In addition, the Project must also submit to Contract Administration lump sum breakdown of the Engineer's Estimate in excel format.                             |     |     |     |
| 21. | <b>FORCE ACCOUNT-INTERNAL</b> - Has a Force Account scope been defined?  | ___ | ___ | ___ |
|     | a. If no, please provide a brief explanation.  |     |     |     |
|     | b. Has a force account estimate been obtained from each force account entity? (i.e. Bus Ops, Signals, Track, Power, etc.)  | ___ | ___ | ___ |
|     | c. Is there a letter/memo/e-mail/TRS from force account entity acknowledging and agreeing to the scope, cost and scheduling of the work to be performed            | ___ | ___ | ___ |
|     | 1. If no, will all the documents described above be obtained prior to bid advertisement.   | ___ | ___ | ___ |
| 22. | <b>FORCE ACCOUNT/THIRD PARTY/EXTERNAL</b> – Has a force account been Defined   | ___ | ___ | ___ |
|     | a. If no, please provide a brief explanation   |     |     |     |
|     | b. Is there a letter/memo/e-mail /PI Agreement from force account entity acknowledging and agreeing to the scope, cost and scheduling of the work to be performed? | ___ | ___ | ___ |
|     | If no, please provide a brief explanation.   |     |     |     |

- 23. Has the designer requested and received a waiver from AGM for all permanent elements that have final design delegated to the contractor? \_\_\_
- 24. A copy of **Section 01590 –Field Office and Sheds** must be attached identifying all equipment ,i.e. laptop(s), cell phone(s) and tablet(s), to be used by field staff. \_\_\_
- 25. A copy of a dummy Staff Summary or Exhibit 3-4, as applicable, must be submitted. \_\_\_
- 26. Project Manager must prepare a slide deck, in power point, (see Instructions) if board approval is required. \_\_\_

## DESIGN

- 27. Does the contract documents include graphics, wayfinding and/or artwork? \_\_\_
  - a. If yes, the project office must submit to Contract Administration a signed letter from the Director of Design stating that the graphics, wayfinding and/or artwork and their locations have been reviewed and accepted.

## REAL ESTATE

- 28. Have all required property rights been acquired for this project? **Project Office must attach concurrence in writing from Chief of Real Estate)** \_\_\_
  - a. If no, the Real Estate Department must attach a concurrence memo approved by the Law Department indicating that all necessary property rights will be acquired prior to issuance of the Notice to Proceed and that advertising is approved.

## PROJECT CONTROLS

- 29. Has a Bid Escrow account been established? (For projects \$1,000,000 or greater) \_\_\_
- 30. Has Value Engineering been performed on this Contract? \_\_\_
  - a. If not, The Project must submit to Contract Administration a signed copy of the Value Engineering Waiver.



31. **LD/MILESTONES** – (LD) must be calculated by Project Office/Designer.

a. List contract milestones below

| Milestones | Description | Calendar Days | Liquidated Damages \$ |
|------------|-------------|---------------|-----------------------|
|            |             |               |                       |
|            |             |               |                       |
|            |             |               |                       |
|            |             |               |                       |
|            |             |               |                       |
|            |             |               |                       |

b. Attach Liquidated Damages calculations

32. **RISK ANALYSIS** – Has risk analysis been performed? \_\_\_\_\_  
 Provide copy of reports. \_\_\_\_\_

a. Construction cost contingency value \_\_\_\_\_

b. Construction schedule contingency: \_\_\_\_\_ days

33. **CONSTRUCTABILITY REVIEW** – Was a constructability review performed at 60% design? \_\_\_\_\_

a. If no, please provide a copy of the approved waiver.

**RISK MANAGER –INSURANCE**

34. Has MBTA Risk Manager confirmed contract specifications, Article 5.04- Insurance, requirements are sufficient for the scope of work for this project. \_\_\_\_\_

**Please attach confirmation email or memo**

a. Is **railroad protection insurance** required? \_\_\_\_\_

b. Is **pollution liability insurance** required? \_\_\_\_\_

c. Are **asbestos, lead or hazardous material abatement** included in this Contract? \_\_\_\_\_

**QA/QC**

- 35. **BUILDING PERMITS** - --Has the project office met with the Department of Public Safety (DPS) and identified all required permits. \_\_\_ \_\_\_ \_\_\_
  - a. If yes, the project office must submit to Contract Administration a **signed letter** from Director of QA/QC stating that all permit requirements have been identified and reviewed by DPS.
  
- 36. Does the contract specifications include paint systems? \_\_\_ \_\_\_ \_\_\_
  - a. If yes, the Project must submit to **a signed letter** stating that the paint systems have been approved by MBTA Director of QA/QC.
  
- 37. Have all sections included in the technical specifications been modified from the most current MBTA published standards to be project specific? \_\_\_ \_\_\_ \_\_\_
  - a. Designer must submit the **table of contents** of the specifications used, **with version dates**, for final specifications. **Please attach confirmation**

**SAFETY**

- 38. Have all safety items been addressed in the specification (refer to sections 5.15, Safety and First Aid, 01568, Construction Safety and 01569, Safety Certification)? \_\_\_ \_\_\_ \_\_\_

**SYSTEMWIDE ACCESSIBILITY**

- 39. Has the Architect/Engineer submitted an appropriate Certificate of Compliance for conformance with 521 CMR Rules and Regulations of the Architectural Access Board, Department of Transportation 49 CFR, Parts 27, 37 and 38 regulations, ADA, and UFAS as applicable? \_\_\_ \_\_\_ \_\_\_
  - a. If the project design does not meet regulations of the Architectural Access Board (AAB), has a **variance application** been submitted to and approved by the AAB? **Please attach confirmation email or memo** from 100% design review \_\_\_ \_\_\_ \_\_\_

|   |
|---|
| <h2 style="margin: 0;">FINAL PRE-BID REVIEW CONTROL SHEET</h2> <h3 style="margin: 0;">ENVIRONMENTAL PERMITTING CHECKLIST SUMMARY</h3> |
|---|

|  |                          |                          |   |
|--|--------------------------|--------------------------|---|
| <b>PROJECT TITLE:</b><br><b>PROJECT CONTRACT #:</b><br><b>PM NAME:</b><br><b>DATE:</b>   |                          |                          |   |
| Have any design changes occurred that have altered the previously submitted environmental permitting requirements?<br><br>Include consultants' letter to verify. | YES                      | NO                       | If 'YES' provide detailed information on what changed, why, and how the permitting has been updated to reflect those changes in an attached consultants letter. |
| SECTION 1.1: NEPA  | <input type="checkbox"/> | <input type="checkbox"/> |   |
| SECTION 1.2: CZM   | <input type="checkbox"/> | <input type="checkbox"/> |   |
| SECTION 1.3: ESA   | <input type="checkbox"/> | <input type="checkbox"/> |   |
| SECTION 1.4: NHPA SECTION 106  | <input type="checkbox"/> | <input type="checkbox"/> |   |
| SECTION 2.1: MEPA  | <input type="checkbox"/> | <input type="checkbox"/> |   |
| SECTION 2.2: CHAPTER 91  | <input type="checkbox"/> | <input type="checkbox"/> |   |
| SECTION 2.3: WPA   | <input type="checkbox"/> | <input type="checkbox"/> |   |
| SECTION 3.1: WQC   | <input type="checkbox"/> | <input type="checkbox"/> |   |
| SECTION 3.2: CWA   | <input type="checkbox"/> | <input type="checkbox"/> |   |
| SECTION 4.1: MHC   | <input type="checkbox"/> | <input type="checkbox"/> |   |
| SECTION 4.2: MESA  | <input type="checkbox"/> | <input type="checkbox"/> |   |
| SECTION 4.3: MANAGEMENT OF HAZARDOUS MATERIALS   | <input type="checkbox"/> | <input type="checkbox"/> |   |
| ASBESTOS   | <input type="checkbox"/> | <input type="checkbox"/> |   |
| LEAD   | <input type="checkbox"/> | <input type="checkbox"/> |   |
| PCBs   | <input type="checkbox"/> | <input type="checkbox"/> |   |
| SECTION 4.4: MCP   | <input type="checkbox"/> | <input type="checkbox"/> |   |
| SECTION 4.5: ARTICLE 97  | <input type="checkbox"/> | <input type="checkbox"/> |   |
| SECTION 4.6: USCG  | <input type="checkbox"/> | <input type="checkbox"/> |   |
| SECTION 4.7: MWRA  | <input type="checkbox"/> | <input type="checkbox"/> |   |
| SECTION 4.8: EPA NPDES CGP   | <input type="checkbox"/> | <input type="checkbox"/> |   |
| SECTION 4.9: EPA NPDES MSGP  | <input type="checkbox"/> | <input type="checkbox"/> |   |
| SECTION 4.10: ON-SITE MACHINERY  | <input type="checkbox"/> | <input type="checkbox"/> |   |
| PETROLEUM  | <input type="checkbox"/> | <input type="checkbox"/> |   |
| COMBUSTIBLE LIQUID   | <input type="checkbox"/> | <input type="checkbox"/> |   |
| UST  | <input type="checkbox"/> | <input type="checkbox"/> |   |
| GENERATOR  | <input type="checkbox"/> | <input type="checkbox"/> |   |
| Have ALL permits and permit applications been included in bid package?   | <input type="checkbox"/> | <input type="checkbox"/> | If 'no', explain in consultants letter.   |
| Has all Project location property ownership due-diligence been completed?  | <input type="checkbox"/> | <input type="checkbox"/> | If 'no' explain in consultants letter.  |

X

---

Senior Director of Energy and Environment

**YOUR SIGNATURE(S) SIGNIFIES THAT YOU HAVE REVIEWED THE CONTRACT DOCUMENTS AND RECOMMEND PROCESSING:**

\_\_\_\_\_  
MBTA Project Manager

\_\_\_\_\_  
Date

\_\_\_\_\_  
MBTA Deputy Chief (Capital Delivery, GLT, RLOL)

\_\_\_\_\_  
Date

\_\_\_\_\_  
MBTA Director of Construction Procurement and Staff

\_\_\_\_\_  
Date

\_\_\_\_\_  
MBTA Chief for (Capital Delivery, GLT, RLOL)

\_\_\_\_\_  
Date