

# Instructions

## Pre-Bid Review Control Sheet

At approximately the 60% design phase, the Project Manager shall start preparing the pre-bid review control sheet in preparation of advertising a construction contract. The PM shall prepare a binder that contains tabs for each of the items requiring back-up documentation. The back-up documentation shall be tabbed in accordance with the numerical item listed on the sheet.

The PRCS and back-up documentation must be complete prior circulating for signatures. The PM must provide the latest copies of the specifications, drawings, estimate and Contract Time Determination (CTD) with the PRCS package. A construction project may not be advertised until the PRCS is complete.

1. Contract number – Obtain from Contract Administration. You must have a work order prior to assigning a contract number. Complete Scope of Work and a brief description of project.
2. FTA Project number and title – Obtain from Administration and Finance.
3. Designer Information – Obtain from engineering consultant.
4. GM Designee – Obtain information from Contract Administration.

### **BUDGET**

5. Estimated Construction Cost – Obtain from engineer's estimate in concert with MBTA Project Controls Policies.
  - a. Funds Available – Obtain information from Administration and Finance Group for Director of Budget approval.
6. Funding Information
  - a. Source of Funds
    - Budget No. - Obtain from Administration and Finance
    - CMS Work Order Number – Obtain from Administration and Finance
  - b. Source of Funds
    - Area No. – Obtain from Administration and Finance
    - Account No. – Obtain from Administration and Finance
    - Center No. – Obtain from Administration and Finance
    - Active Work Order No. – Obtain from Administration and Finance

## **CONTRACT ADMINISTRATION**

7. Method of Procurement – Sign and date Decision Matrix
8. Desired Advertisement Period – PM to determine
9. Restrictive Provisions – PM to coordinate with Contract Administration Department.
10. Alternative Delivery – PM to coordinate with AGM and Contract Administration.
11. Product specifications – PM to coordinate with Procurement and Logistics Department and consulting engineer.

## **FEDERAL TRANSIT ADMINISTRATION**

12. FTA Provisions – Work with Contract Administration and Administration and Finance. PM must sign this section.
13. Federal EEO - Work with Office of Diversity and Civil Rights for latest EEO Specifications
14. Federal EEO - Work with Office of Diversity and Civil Rights for DBE and Contract Administration for MMU and FMU

## **PROJECT MANAGEMENT**

15. Specialty Items – Project Manager
16. Long-range Procurement – PM to consult with the Procurement and Logistics Department, the consulting engineer, and the applicable MBTA Technical Department.
17. Revenue Producing Construction Cost – Project Manager
18. Other construction projects – Project Manager – List adjacent projects including contract number and the impact if any it will have on your project (i.e. access restraints, etc.) if project is impacted, explain how the effects will be mitigated?
19. Allowances – PM must provide justification and backup for the dollar values stated for each allowance. PM must provide substantiation as to how each allowance value was derived. PM should coordinate with the engineering consultant. Coordinate risk contingency allowance with Project Controls Group. Note: Check Specifications to make sure allowance items are included and correct.

20. Engineering Estimate – Project Manager to provide a copy of the engineering estimate for the PRCS and an electronic copy (Excel, not just PDF) must also be provided (electronic copy to be sent to project controls). Project Manager in conjunction with Project Controls Manual Section 2.
  - a. Lump Sum – Project Manager
21. Force Account
  - a. Internal – PM to coordinate with MBTA internal operations departments and obtain cost estimates and agreements required to complete the work. Concurrence on the scope and estimate from each entity must be included in Pre-Bid Package.
22. Force Account
  - a. External – PM to coordinate with railroads, municipalities, utilities, etc. Provide cost estimates and agreements required to complete the work. PI Agreements and estimates to be included in Pre-Bid Package.
23. Designer to request a waiver from the AGM for all permanent elements that have final design delegate to the contractor
24. Include **Section 01590 –Field Office and Sheds** identifying all equipment, i.e. laptop(s), cell phone(s) and tablet(s) to be used in the project
25. If applicable attach a dummy staff summary or Exhibit 3-4 (located on the Y Drive; Y:\Contract Administration\Standard Forms\Exhibit 3-4 Forms)
26. Project Manager to prepare a slide deck (including but not limited to the scope of project, why it is needed, construction schedule, project budget, if MBTA entities will be completing a portion of the work) if FCMB Board approval is needed. See attached for information on the Deck Development Process.

## **DESIGN**

27. Art, Way Finders and Graphics – PM to coordinate with Director of Design

## **REAL ESTATE**

28. Real Estate – PM works with MBTA Real Estate Department and engineering consultant. Attach concurrence memo.

## **PROJECT CONTROLS**

29. Bid Escrow – PM to obtain an estimate for MBTA Bid Escrow Agent Services for projects \$1,000,000 or greater
30. Value Engineering – Coordinate with Project Controls Group and provide VE report or waiver
31. LD/Milestones
  - a. List contract milestones, including MS# and description
  - b. Liquidated Damages – PM to coordinate with Project Controls Department and consulting engineer. The substantiation for LD's must be included in Pre-Bid Package.
32. Risk Analysis – Coordinate with Project Controls Group and provide copy of report.
  - a. Contingency Value - Value taken from Risk Report. If providing a contingency value that differs from the Risk Report, explain why.
  - b. Construction schedule contingency – Value taken from Risk Report. If providing a value that differs from the Risk Report, explain why.
33. Constructability Review – Coordinate with Project Controls Group. Provide copy of report or waiver.

## **RISK MANAGER - INSURANCE**

34. Insurance (RR Protection/pollution liability) – PM to coordinate with MBTA Risk Manager
  - a. Railroad Protection – PM to coordinate with MBTA Risk Manager
  - b. Pollution Liability – PM to coordinate with MBTA Risk Manager
  - c. Hazardous Materials – PM to coordinate with the Director of Environmental Compliance and the engineering consultant.

## **QA/QC**

35. Building Permit – PM to coordinate with Director of QA/QC. See attached for memo template
36. Paint Systems – PM to coordinate with MBTA Quality Assurance Department within Design & Construction. See attached for memo template

37. PM to coordinate with the designer in order to provide a table of contents of the specifications used with version dates. PM to coordinate with QA/QC for approval of modified sections. See attached for memo template

#### **SAFETY**

38. Safety – PM to coordinate with MBTA Safety Department.

#### **SYSTEMWIDE ACCESSIBILITY**

39. Equal Facilities – PM to coordinate with consulting engineer and Systemwide Accessibility. Attach Systemwide Accessibility confirmation email from 100% review.

#### **ENVIRONMENTAL**

40. Environmental Permit Worksheet – Coordinate with Environmental Compliance Group.

**Signatures – Signatures should be obtained in the order depicted on the signature page in order to minimize delays.**