

Site Examinations

Guidelines for Site Examinations during Tender Period

Summary

Site examinations during the tender period are to assure Owners and Consultants that bidders have familiarized themselves with the existing conditions and have had an opportunity to have their questions answered. Certain issues should be addressed, where a site examination during the tender period is requested.

INTENT

This bulletin is intended to provide guidance during the preparation of Bid Documents where a site examination during the tender period is requested, and to address issues that have been, or could be, problematic. This bulletin is not intended to determine when and if a site examination should be mandatory, but to outline the process that should be considered.

PURPOSE OF SITE EXAMINATIONS

The purpose of a site examination during the tender period is to assure Owners and Consultants that bidders have visited the Place of the Work to familiarize themselves with the existing conditions and have had an opportunity to have their questions answered.

- A site examination is a familiarization visit and is not intended to discuss scope of work issues that may not be documented.
- A site examination is not intended to replace clear, concise, and complete Bid Documents, or issuance of addenda.

“MANDATORY” SITE EXAMINATIONS

Not all site examinations are mandatory. If the Bid Documents indicate that a site examination is mandatory, then all bidders and identified contractors must attend at the date and time specified, and the Owner is obligated to refuse Bids from bidders who do not attend. Participants

should be employed by the bidder, or designated by the bidder as the bidder's authorized representative. The Instructions to Bidders must clearly indicate if contractors other than bidders are required to attend the mandatory site examination and if there are any limitations on the number of people allowed to attend from each company.

NOTICE AND TIMING

Notice of a mandatory site examination must be included in the Bid Documents in the Instructions to Bidders. Notice must also be included in public announcements of the tender opportunity (i.e. Bid Call, or Invitation to Bid).

- Bid Documents should be available a minimum of four Working Days prior to a site examination.
- Site examination should be scheduled five to eight Working Days prior to tender closing.
- Provide a minimum of 48 hours notice to change a site examination in the form of an addendum.
- There should be only one mandatory site examination.
- If the minimum number of prospective bidders required (pre-determined by the Owner) is not met, then another site examination should be scheduled and its notice published in an addendum. Those who attended the first site examination do not need to attend again.



GENERAL PRACTICE

C.2

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CONDUCTING A SITE EXAMINATION

To ensure a successful and productive site examination, the bid calling authority should consider the following:

- Maintain a written record of attendees at mandatory site examinations. The form should include the name of the company, their representative(s), and their signature(s).
- The Owner or their designate should lead the site examination and walk the attendees through the site.
- The Owner or their designate should declare, at the time of the site examination that no further attendees are allowed and all attendees are recorded. No further additions should be allowed.
- Bidders who do not attend a mandatory site examination, including bidders who are late, must not be allowed to Bid. This information must be stated in the Bid Documents.
- Following a mandatory site examination, specific discussions should be and all decisions must be documented and published in an addendum. The list of the intended bidders in attendance, and as a result eligible to Bid, must also be published in an addendum.

Construction Specifications Canada (CSC) publishes the TEK•AID series of referenced documents which can assist in the development of specifications. The TEK•AID for Division 0 provides an empirical yet accurate approach to organizing the bidding and contractual information portions of a Project Manual. TEK•AIDs are intended to be used in conjunction with Canadian Construction Documents Committee (CCDC) standard forms of contract and guide documents and the National Master Specification (NMS). Terminology in this Bulletin has been used to provide accurate meanings consistent with the CCDC series of documents.