

Bid Package Review Checklist

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Bid Package Scope & Clarity

Ensures the scope of work is clearly defined, accurate, and unambiguous to ensure fair and comparable bids.

Project Description Summary

Write something...

Scope of Work - Detailed Review

Write something...



Estimated Project Duration (Days/Weeks)

Enter a number...

Contract Type (e.g., Lump Sum, Cost Plus, Unit Price)

- ☐ Lump Sum
- ☐ Cost Plus
- ☐ Unit Price
- ☐ Design-Build

Areas of Scope Included?

- ☐ Site Preparation
- ☐ Demolition
- ☐ Foundation
- ☐ Framing
- ☐ MEP (Mechanical, Electrical, Plumbing)
- ☐ Finishes

Assumed Site Conditions Notes (if any)

Write something...

Potential Scope Gaps or Ambiguities Identified

Write something...

Contract Documents Review

Covers review of all contractual agreements, specifications, and general conditions.

Review General Conditions (Document Number):

Write something...

Contract Duration (in days/weeks/months):

Enter a number...

Contract Type (e.g., Lump Sum, Cost-Plus, Unit Price):

- ☐ Lump Sum
- ☐ Cost-Plus
- ☐ Unit Price
- ☐ Design-Build

Substantial Completion Date:

Enter date...

Upload Signed Contract (if available):

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Note any discrepancies or ambiguities in contract language:

Write something...

Technical Specifications

Focuses on the technical details of materials, methods, and performance requirements.

Material Quality Standards Description

Write something...

Specified Concrete Strength (PSI)

Enter a number...

Required Testing & Inspections

☐ Soil Testing

☐ Concrete Testing

☐ Welding Inspection

☐ Material Certification

☐ Other (Specify)

Attach Material Safety Data Sheets (MSDS)



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Acceptable Brand/Manufacturer List Compliance

- ☐ Compliant
- ☐ Deviation Required (Explain)

Minimum Paint Thickness (Mils)

Enter a number...

Specific Installation Procedures or Details

Write something...

Drawings & Plans

Verification of accuracy, completeness, and coordination of all drawings.

Architectural Drawings - Review for Completeness

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Structural Drawings - Review for Completeness

 Upload File

Drawing Revision Numbers - Verified Against Latest Set?

Enter a number...

Note any discrepancies or conflicts between drawings.

Write something...

Are all disciplines coordinated? (Architectural, Structural, MEP)

- ☐ Yes
- ☐ No
- ☐ Requires Further Review

Are all dimensions consistent across disciplines?

- ☐ Yes
- ☐ No
- ☐ Requires Further Review

Describe any inconsistencies or areas of concern noted in the drawings.

Write something...

Permitting & Regulatory Compliance

Addresses permits, codes, and regulations relevant to the project.

Identify Required Permits

- ☐ Building Permit
- ☐ Electrical Permit
- ☐ Plumbing Permit
- ☐ Mechanical Permit
- ☐ Environmental Permits
- ☐ Other (Specify)

Permit Research Notes

Write something...

Estimated Permit Fees

Enter a number...

Estimated Permit Application Submission Date

Enter date...

Estimated Permit Approval Date

Enter date...

Relevant Codes & Regulations

- ☐ IBC
- ☐ NEC
- ☐ IPC
- ☐ IMC
- ☐ Local Building Codes
- ☐ Environmental Regulations

Supporting Documentation (e.g., Code Books, Regulatory Info)

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Cost & Schedule Considerations

Evaluates potential cost implications and scheduling risks associated with the bid package.

Estimated Labor Cost

Enter a number...

Estimated Material Cost

Estimated Subcontractor Costs

Contingency Allowance (Percentage)

Project Start Date (Estimated)

Project Completion Date (Estimated)

Duration of Bid Package (Days/Weeks)

Potential Schedule Risks & Mitigation Strategies

Write something...

Payment Terms (Review & Adequacy)

- ☐ Acceptable
- ☐ Needs Adjustment
- ☐ Unacceptable

Bidder Qualifications & Resources

Assesses the bidder's capabilities to execute the work as defined in the bid package.

Years of Experience in Similar Projects

Enter a number...

Relevant Certifications (Select all that apply)

- ☐ OSHA 30
- ☐ LEED AP
- ☐ DBIA Certified
- ☐ Other (Specify in Long Text)

Brief Project History (Relevant Projects)

Write something...

Proof of License & Insurance

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Number of Employees Dedicated to this Project

Enter a number...

Project Manager's Qualifications (Based on Years of Experience)

- ☐ Less than 2 years
- ☐ 2-5 years
- ☐ 5-10 years
- ☐ 10+ years

Description of Equipment Available for Project

Write something...

Bid Form & Instructions

Verifies clarity and completeness of the bid form and instructions for bidders.

Bid Package Title Verification

Write something...

Instructions for Submission Clarity

Write something...

Bid Due Date Verification

Enter a number...

Bid Form Completeness (All Sections Present)

☐ Yes

☐ No

License/Certification Verification Included?

☐ Yes

☐ No

Sample Bid Form (for Review)

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Insurance & Bonding Requirements

Confirms the appropriate insurance and bonding requirements are specified.

Workers' Compensation Insurance Limit (per accident)

Employers Liability Insurance Limit (per accident)

General Liability Insurance Limit (per occurrence)

Automobile Liability Insurance Limit (per occurrence)

Bond Type Required

- ☐ Bid Bond
- ☐ Performance Bond
- ☐ Payment Bond
- ☐ All of the Above

Bid Bond Amount (Percentage of Bid)

Enter a number...

Performance Bond Amount (Percentage of Contract)

Enter a number...

Payment Bond Amount (Percentage of Contract)

Enter a number...

Special Insurance Requirements/Notes

Write something...

Insurance Certificate Upload (for reference)

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Sustainability & Environmental Considerations

Evaluates the inclusion of sustainability goals and environmental requirements.

Are LEED or other green building standards required?

☐ Yes

☐ No

☐ Specify (Long Text)

Which of the following sustainable materials are encouraged/required?

- ☐ Recycled Content Materials
- ☐ Locally Sourced Materials
- ☐ Renewable Resources
- ☐ Low-VOC Materials
- ☐ None Specified

Required percentage of recycled content (if applicable)

Enter a number...

Describe any specific waste management plan requirements.

Write something...

Does the project include requirements for erosion and sediment control?

- ☐ Yes
- ☐ No

Are there specific requirements for protecting existing vegetation or wildlife?

Write something...

Upload any environmental impact assessment documentation (if applicable).

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