



# Mandatory Site Visit Guidelines

*This paper as approved by BCCA is not to determine when and if the site visit should be mandatory, but to outline the process to be followed if it is selected.*

The issues surrounding mandatory site visits have prompted the Association to look at a process that would be fair, accountable, and transparent. There are many grey areas that have caused both owners and contractors problems. The purpose of this paper is to provide the following summary of the issues and possible solutions.

## **Issue: Why have Site Visits?**

### ***Position:***

Owners and consultants need to be assured that the contractors bidding on the job have visited the site and are familiar with the conditions *and get their questions answered in writing.*

- The purpose of a site visit is to have bidders acquaint themselves with existing conditions.
- The key is to remember that all information **visibly seen at the site meeting and** pertaining to the project must be in writing as part of the contract documents.
- The purpose is not to discuss scope of work issues that may not be documented. It is a familiarization visit.
- The purpose is not to replace quality contract documents and issuance of addenda.

## **Issue: Why Hold “Mandatory” Site Visits**

### ***Position:***

- We don't have a position on whether mandatory or not, but if it is mandatory it means that all required contractors must attend at the date and time specified.

## **Issue: Who Should Attend?**

### ***Position:***

- The contract documents should clearly indicate which contractors should attend the visit.
  - Prime Only
  - Prime and Specified Major Trades
  - Other Specified Trades
- It should be attended by a representative of each bidding company.
- Any person sent on behalf of the company is an acceptable representative. It is the bidding company who assumes the liability of lack of understanding.
- Details of the site visit need to be documented.
- A Notice should be sent to the Association and the newspapers about the mandatory visit. The Site Visit should occur five to eight working days prior to tender closing.
- Notice must be in the invitation to tender.

## **Issue: Details of The Visit**

### ***Position:***

- There should be only one Mandatory site visit.
- The working documents should be available four working days prior to the site visit.
- If the minimum number of bidders required (predetermined by the owner) is not met then another site visit should be scheduled and announced in an addendum. Those who attend the first visit do not need to attend again.
- Those who do not attend and those who are late will not be eligible to bid. (This information needs to be stated in documents.)
- The owner's designate should lead the meeting.
- The owner's designate should declare, at the time of the site visit, that no further attendees are allowed and all attendees are so recorded. No further additions are allowed.
- Notice of change to a site visit should be a minimum of 48 hours.

## **Issue: Sign-in Form**

### ***Position***

- A form of some sort needs to be used to document who is in attendance. The form should include the name of the company, the representative, and signature of representative.
- After the visit, an addendum shall be issued to declare which contractors are eligible to bid.