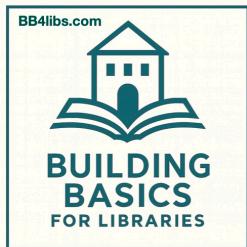


PUBLIC BID WALKTHROUGH

Purpose • Types • Timing • Expectations



WHAT IS A PUBLIC BID WALKTHROUGH?

A **public bid walkthrough** (also called a *pre-bid site visit* or *job walk*) is a structured, on-site meeting conducted before bids are submitted. Its purpose is to give all prospective bidders **equal access** to observe existing conditions, understand site constraints, and identify factors that may affect cost, access, sequencing, or risk.

Walkthroughs are a standard best practice in public procurement and help ensure bids are **accurate, competitive, and defensible**.

PURPOSE OF A BID WALKTHROUGH

A properly conducted walkthrough helps to:

- Provide transparency and fairness in public bidding
- Allow bidders to observe existing conditions firsthand
- Reduce assumptions and misinterpretation of drawings
- Identify access, safety, and operational constraints
- Reduce change orders caused by unknown conditions
- Create a documented, equitable procurement process

A walkthrough benefits **both the agency and bidders** by aligning expectations before bids are submitted.

TYPES OF PUBLIC BID WALKTHROUGHS

Mandatory Walkthrough

- Attendance is required to submit a bid
- Failure to attend results in disqualification
- Used for complex, high-risk, or renovation projects
- Attendance must be documented and verified

Non-Mandatory Walkthrough

- Attendance is optional but encouraged
- Often used for smaller or lower-risk projects
- Allows bidders to better understand the site
- Attendance is still documented

The walkthrough type must match exactly what is stated in the IFB or RFP.

WHEN SHOULD A WALKTHROUGH BE HELD?

A walkthrough is recommended when a project involves:

- Existing buildings or renovations
- Occupied facilities (libraries, schools, offices)
- Limited access, security, or staging areas
- Mechanical, electrical, or infrastructure work
- Historic or sensitive materials
- Incomplete, conceptual, or partial drawings

Walkthroughs are typically held **early in the bid period**, allowing sufficient time for questions and written addenda.

WHAT A WALKTHROUGH IS – AND IS NOT

The Walkthrough IS:

- Informational
- Public and group-based
- Focused on observation and clarification
- Documented and standardized

The Walkthrough IS NOT:

- A design meeting
- A negotiation
- A substitute for the bid documents
- A forum for means-and-methods guidance
- An opportunity for private discussions

WALKTHROUGH INTRODUCTION (FOR STAFF OR PACKETS)

This Public Bid Walkthrough is conducted to support a **fair, transparent, and well-informed bidding process**. The walkthrough provides all prospective bidders an equal opportunity to observe site conditions and understand operational constraints prior to submitting a bid.

The walkthrough is **informational only**. Verbal statements made during the walkthrough are **non-binding** and do not modify the bid documents. Only written addenda issued by the Agency may clarify or change the requirements of the solicitation.

All questions must be asked in a group setting or submitted in writing by the stated deadline. Responses will be shared with all bidders to ensure consistency and equity in the procurement process.

WHY THIS MATTERS

A consistent walkthrough process:

- Improves bid quality
- Reduces disputes and protests
- Protects staff and agencies
- Demonstrates professionalism and accountability
- Creates a defensible public record

How to Conduct a Walkthrough

1. Pre-Walk Preparation (Critical)

This step determines whether the walkthrough is effective—or chaotic.

✓ Confirm Walkthrough Requirements

Verify whether the walkthrough is:

Mandatory (failure to attend = disqualification)

Non-mandatory (recommended but not required)

This must match the **IFB/RFP language exactly**

✓ Schedule & Advertise

Set a **single official date and time**

Include in:

Bid advertisement

IFB/RFP

Addenda (if needed)

Avoid private or staggered walkthroughs unless explicitly allowed

✓ Prepare Materials

Have available (printed or digital):

- Sign-in sheet (company name, attendee, contact info)
- Project summary sheet
- Site plans / floor plans
- Known constraints or hazards
- PPE requirements (if any)

2. Opening the Walkthrough (5–10 Minutes)

Set the tone and legal guardrails early.

Start With Ground Rules

Cover these **out loud**:

- This is a **public, informational walkthrough**
- No side conversations or private clarifications
- All questions must be asked **in front of the group**
- Answers given verbally are **not binding**
- Only **written addenda** modify the bid documents

Best practice: Repeat this language at the end.

Introduce Key Staff

- Owner's representative / facilities manager
- Project manager
- Architect/Engineer (if applicable)
- Procurement officer (optional but helpful)

3. Conducting the Site Walk

Walk the site in a logical sequence—don't improvise.

Typical Route

- Entry / staging areas
- Existing conditions
- Mechanical/electrical rooms
- Roof access (if allowed)
- Utility shutoffs
- Work zones vs. occupied areas
- ADA access constraints

What You Should Point Out

- Known issues or limitations
- Occupied hours and restrictions
- Noise, dust, and access limitations
- Security or safety constraints
- Historic or sensitive materials
- Areas with incomplete drawings

What You Should Not Do

- Suggest means or methods
- Offer opinions on cost
- “Help” one bidder over another
- Answer speculative questions

4. Managing Questions (Very Important)

This is where most agencies make mistakes.

During the Walkthrough

- Allow clarifying questions
- Keep answers **high-level**
- If unsure, say:
“Please submit that as a written question.”

After the Walkthrough

- Set a **formal deadline** for written questions
- All responses must be:
 - Written
 - Distributed to **all bidders**
 - Issued as an **addendum**

► **Never** give private follow-up answers.

5. Documentation & Compliance

Your protection lives here.

Required Records

- Sign-in sheet
- Notes of major questions
- Photos taken (if allowed)
- Addenda issued

If the Walk Is Mandatory

- Attendance must be verified
- Late arrivals:
 - Allowed only if documents specify
 - Otherwise = disqualification

6. Closing the Walkthrough

End it cleanly and consistently.

Closing Script (Example)

“This concludes the public bid walkthrough.
Please remember that all questions must be submitted in writing by [date/time].
Any clarifications will be issued by formal addendum only.
Thank you for attending.”

7. Common Pitfalls to Avoid

- ✗ Side conversations with contractors
- ✗ Answering design-level questions on site
- ✗ Letting one bidder linger for extra access
- ✗ Deviating from published rules
- ✗ Forgetting to issue addenda

8. Why This Matters (Especially for Libraries)

A well-run bid walkthrough:

- Reduces change orders
- Improves bid accuracy
- Protects staff from protests
- Creates defensible procurement records
- Signals professionalism and fairness