



PUBLIC-SECTOR RESOURCE · PROCUREMENT

Municipal & Institutional Project Readiness Checklist

Everything to settle before issuing an RFQ or tender, so contractors can price your project with confidence and your budget holds.

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Written for: Municipalities, counties, school boards and other public owners in Alberta.

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Why readiness matters

The best price comes from a tender that contractors can price without guessing. Every unclear item becomes a contingency in the bid, a question during tender, or a change order during construction.

This checklist is for municipalities, school boards and other public owners without full-time project staff. Use it before issuing an RFQ, RFP or tender.

Project readiness checklist

SCOPE AND NEED

- ☐ Problem and desired outcome written down in one or two paragraphs
- ☐ Scope defined: what's included, and what's not
- ☐ Site visit or condition assessment done, with photos
- ☐ Hazardous materials assessment done for buildings built before 1990

BUDGET AND APPROVALS

- ☐ Budget approved by council or board, with funding source confirmed
- ☐ Contingency carried: 10–15% for new work, 15–20% for renovations
- ☐ Grant conditions understood: deadlines, reporting, eligible costs
- ☐ Signing authority and approval process for change orders defined

DESIGN AND DOCUMENTS

- ☐ Drawings and specs from a registered professional where the work requires it
- ☐ Or a clear performance spec for design-build or small works
- ☐ Permits identified, and who obtains them
- ☐ Utility locates, survey or geotechnical information included where relevant

PROCUREMENT

- ☐ Estimated value checked against trade agreement thresholds (table below)
- ☐ Procurement method chosen and matched to the project
- ☐ Evaluation criteria and weighting stated in the document
- ☐ Mandatory requirements kept to what really matters
- ☐ Site visit date set, and question deadline at least 5 business days before close
- ☐ Enough time to bid: 2–3 weeks for small works, longer for larger projects

CONTRACTOR REQUIREMENTS

- ☐ Insurance limits stated: CGL, auto, and others where needed
- ☐ Safety: COR or SECOR, and WCB clearance
- ☐ Bonding requirements proportionate to the project
- ☐ References or past project experience requested

SCHEDULE

- ☐ Start and completion dates realistic for the season
- ☐ Operational constraints stated: hours, occupied areas, events
- ☐ Long-lead materials identified, with early ordering allowed

Trade agreement thresholds for construction

Above these values, Alberta municipalities and other public-sector bodies generally must tender construction openly. Thresholds apply to the estimated total value and are reset every two years.

Agreement	Construction threshold (2026–2027)	Notes
New West Partnership Trade Agreement (NWPTA)	\$200,000	BC, Alberta, Saskatchewan, Manitoba
Canadian Free Trade Agreement (CFTA)	\$347,400	All provinces and territories
Canada–EU Trade Agreement (CETA)	\$9.2 million	Municipalities, academic, school and health bodies

Thresholds in effect January 1, 2026 to December 31, 2027. Check your own purchasing policy and current thresholds before issuing — your policy may set lower limits. Source: published 2026–2027 trade agreement thresholds.

Choosing a delivery method

Method	Best for	Watch for
Stipulated price (design-bid-build)	Well-defined projects with complete drawings	Change orders where documents are incomplete
Unit price	Repeat or quantity-driven work: paving, utilities, repairs	Quantity estimates must be realistic
Construction management	Complex, phased or occupied-building projects	Requires an owner willing to stay involved
Design-build	Simpler buildings where speed matters	Less owner control over design details
Invited quotes / small works	Projects under your policy's open-tender limit	Keep it fair and documented

Need a sounding board before you tender?

Boald works with municipalities and public owners across Alberta. If you're scoping a project and want a contractor's view on budget, schedule or constructability, give us a call.

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Thresholds and requirements change; confirm against your own purchasing policy and current trade agreements. © 2026 Boald Construction Management Ltd. General information only; not legal, engineering or professional advice.