

SUBJECT: Award of Minor Projects to Continuing Service Contractors Selected through a Qualifications Basis	Effective Date: 5/03/22	Policy Number: FSP 2015 FPC0008	
	Supersedes: FSP 2013 FPC0006	Page 1	Of 3
	Responsible Authority: Sr. Director, Facilities Planning and Construction		

APPLICABILITY/ACCOUNTABILITY:

This Policy applies to all Facilities Planning and Construction (FP&C) employees responsible for managing projects with Continuing Services Contractors (CSC) selected through a qualification-based process.

DEFINITIONS:

e-Builder. Software used by Facilities for project management.

e-BQuotes. Process used by UCF to request and receive bids, quotes, and related correspondence using the e-Builder bidding module in order to ensure fair competition among companies.

e-BQuotes Bid Form. Standard, electronic form contained within the e-Builder software to be completed by quoting CSC which specifically lists pricing for items being priced, and which acts as a checklist to ensure that all costs are included.

Bid Clarification (BC). Written request to clarify a specific issue of the scope of work.

Scope of Work (SOW). Document developed that captures and defines the work activities, deliverables, and timeline a company must execute in performance of specified work for UCF.

Scoping. Review and comparison of quotes or bids by two or more UCF employees to ensure that prices given are for the same SOW.

POLICY STATEMENT:

While state statute does not require bidding among CSC, UCF will award Minor Projects in such a way as to ensure the best value for the lowest cost. "Project" is defined in accordance with FS 2017 FS0028, *Procedure for Determining When Actions are Projects or Repairs*.

POLICY:

All projects will be reviewed by the Project Manager and the department to select the most appropriate award method. FP&C employees will not influence the award of projects to companies with which they have a potential conflict of interest. Employees must disclose in writing any conflict of interest, either actual or perceived. e-BQuotes is to be used solely for the purpose of establishing a price for funded projects and may not be used for obtaining estimates. In addition, when e-BQuotes is used, previously obtained quotes or bids will be disqualified.

Emergency purchases will follow the requirements of the UCF Purchasing Procedure Manual, and will not flow through eBuilder. To avoid expiration, award decisions will be made within 30 days of quotes or bids, unless UCF requests and receives approval, in writing, a bid extension from each company that provided a quote or bid. Purchase Orders (POs) will be issued after the project is awarded.

PROCEDURE:

A. For projects less than \$35,000 which will not be completed in-house:

1. The Project Manager will prepare a SOW.
2. The Project Manager will rotate or bid projects among CSCs. If no CSC exist for a particular project, the Project Manager will follow Purchasing's "Bid and Quote Limits."
3. The department will maintain a database to track and monitor the total dollar value of work rotated amongst all CSC, and will make reports available to division leadership upon request.

B. For projects \$35,000 or greater which will be awarded to General Contractors or trades, and there is a defined SOW:

1. The Project Manager will prepare the SOW.
2. The Project Manager will use e-BQuotes to request quotes or bids in accordance with the current e-BQuotes policy/procedure, or, if pre-priced by contract terms, use rotation among vendors.
3. The department will maintain a database to track quotes received, projects awarded, and cost saved by using the e-BQuotes process.
4. Exceptions to this Procedure must be justified in writing and can only be approved by the Director of Facilities Planning and Construction. Justifications will cite the criteria outlined in C.1. below.

C. For projects \$35,000 or greater which will be awarded to a CSC and there is no defined SOW or design:

1. The Project Manager will complete a Project Charter (Project Management Plan) which includes the proposed delivery method, estimated project cost, estimated project schedule, and recommendation for award of the project based on the following criteria:

-Type of project: sitework/roadwork/traffic signals, classroom/office renovations, research/wet lab, computer lab, new construction, etc.;

-Location of project: contractor's current or recent work in the same building or successful past experience with faculty/staff on another project in same building (familiarity with MEP systems, locations, and limitations);

-Client group;

-Contractor's expertise and specialized experience on similar projects;

-Contractor's workload and due dates, as they relate to their ability to meet time requirements, when expediting the project is necessary;

-Fair share of work;

-Contractor's demonstrated past performance in terms of quality, time, and budget.

2. The Project Charter will be reviewed and approved by the department's Manager and Director. Projects managed in e-Builder will use the e-Builder Project Charter Approval process. Projects managed outside of e-Builder will use a Project Charter form.
3. Rejected Project Charters will need to use a different delivery method, or be resubmitted with additional backup, as directed.
4. If the Project Manager or the client representative has reason to believe that the price provided is too high, the Project Manager will, in the order listed:
 - i. Request price clarification and detailed price break-outs amounts;
 - ii. Meet with the contractor to try to resolve the issue(s);
 - iii. Request detailed estimates from other pre-qualified firms;
 - iv. Move on to another pre-qualified contractor.

RELATED DOCUMENTS:

FS 2017 FS0028,

[Procedure for Determining When Actions are Projects or Repairs](#)

Approved by: Duane Siemen, Assistant Vice President, Facilities 5/3/22.