

<b>SUBJECT:</b> e-BQuotes	<b>Effective Date:</b> 7/26/2018	<b>Procedure Number:</b> FS 2018 FS0034	
	<b>Supersedes:</b> FS 2015 FS0014	<b>Page</b> 1	<b>Of</b> 4
	<b>Responsible Authority:</b> Associate Vice President for Administration and Finance (Facilities and Safety)		

**APPLICABILITY/ACCOUNTABILITY:**

This procedure applies to all Facilities and Safety employees who solicit quotes or bids for Minor Projects or repair.

**DEFINITIONS:**

CC: Certificate of Completion

CO: Certificate of Occupancy

DOPO: Direct Owner Purchase Order

e-Builder: a software used by Facilities and Safety for project management

e-BQuotes: the 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 Manager: a Facilities and Safety employee assigned by the Associate Vice President to review e-BQuotes

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

Project Manager: the UCF Facilities & Safety person responsible for the development of the Scope of Work of the project or repair and the management of the work to be performed; the person assigned the role of Project Manager in e-Builder.

Quality Management & Improvement (QMI): processes and personnel put in place to measure and assure quality of products and services, and to ensure that products and services meet expectations, and comply with statutes, rules, regulations, and policies

Bid Clarification (BC): a written request to clarify a specific issue of the scope of work

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

Scoping: a review and comparison of quotes and bids by two or more UCF employees to ensure that prices given are for the same scope of work

### **PROCEDURE STATEMENT:**

Facilities and Safety employees will not influence the award of projects to companies. Employees having a conflict of interest, either actual or perceived, will disclose the conflict formally.

e-BQuotes is to be used solely for the purpose of establishing a price for funded projects and will not be used for obtaining estimates. When e-BQuotes is cited, other quotes or bids will be disqualified.

Purchase Orders (POs) will not be issued until after the project is awarded.

Award decisions will be made within 30 days from receipt of quotes or bids to avoid expiration.

e-BQuotes is not intended to govern emergency purchases. Instead, emergency purchases will follow the requirements of the UCF Purchasing Procedure Manual.

Bids and awards shall be recorded and retained within e-Builder.

### **PROCEDURE:**

1. The Project Manager will provide a rough construction estimate to the UCF project requestor, and confirm with the UCF project requestor that the project is adequately funded.
2. The Project Manager will have an approved Project Charter before initiating e-BQuotes.
3. The Project Manager will develop, or have developed, a detailed Scope of Work (SOW) that will be used to solicit bids or quotes. The SOW will include the following, at a minimum:
  - a. Project location
  - b. Sketches, drawings, photographs, narratives, and other documents created by the UCF Project Manager or our A/E consultants to describe the Scope of Work
  - c. Project schedule, including working hours
  - d. Project logistics, including building access, parking, and other project specific items that will affect the Scope of Work

- e. Project general requirements, such as temporary protection, contractor work rules, and expectations, etc.
  - f. Building Code Office requirements for permits, CCs, COs, and inspections
  - g. Accounting requirements and procedures related to DOPO, invoices, payment applications, etc.
  - h. Inclusion and reference of UCF Standards as part of the Scope of Work
4. The Project Manager will initiate the e-BQuotes process using the e-Builder bidding module. The bid announcement will include the date and time of the onsite walk-through, as well as the requested deadline for response to the university (generally 5 – 7 business days). The Project Manager will not contact the contractors directly to solicit quotes.
5. All Bid Clarifications (BCs) concerning the Scope of Work will be submitted using the e-Builder bidding module. The e-BQuotes Manager must be included on all e-Builder bidding correspondence. All responses to bidders will be issued using the e-Builder bidding module. Any correspondence outside of e-Builder during the bid process will disqualify the vendor regardless of which party initiates the correspondence.
6. The contractors must submit their quotes using the e-Builder bidding module. Emailed quotes will be disqualified.
7. Incomplete quotes will be disqualified.
8. The Project Manager and e-BQuotes Manager will evaluate the quotes to determine whether they are inclusive of the work requested and whether they are based on the same scope. Where clarification is deemed necessary, the Project Manager will either: 1) schedule and attend a meeting with the e-BQuotes Manager and company representatives to resolve the differences so that the quotes are based on the same scope, assumptions, and exclusions, or 2) obtain quote clarifications through e-Builder, copying the e-BQuotes Manager on all bidding correspondence. At no time will UCF revise a contractor's cost or ask a company to submit a revised quote. Any change in cost to a quote (up or down) by a company prior to award will disqualify its quote.
9. After thoroughly reviewing and scoping all bids, the Project Manager will make a recommendation to award the project to a selected bidder using the e-Builder bidding module workflow process. This recommendation must consider the following:
  - a. Verification by the Project Manager that the recommended company can perform the work at the recommended award amount, and within the specified timeframe
  - b. Acceptance of any exceptions or exclusions

- c. Verification by the Project Manager that the recommended bidder has included compliance with the UCF Standards

The Project Manager will recommend to the e-BQuotes Manager an award within 20 days of receipt of quotes or bids, or the bids will be cancelled and re-bid.

- 10. If the e-BQuotes Manager has no objections to the recommendation of the Project Manager, the e-BQuotes Manager will advance the recommendation to the assigned Director for approval using the e-Builder bidding workflow process. Upon Director approval, the Project Manager will provide the notice of award to all companies, listing the project quotes for each responsive company.
- 11. After bid completion and award for Facilities & Safety projects, the Project Manager will produce a funding request for the client, including construction costs, UCF departmental costs (FP&C, UCF IT, UES, FO, etc.), and permit costs. This request will be sent to the client representative so that funds can be transferred for the project.
- 12. The Project Manager for Facilities & Safety projects will coordinate with the F&S Business Office to generate a requisition and purchase order for the selected contractor. The purchase order number will be entered into e-Builder upon receipt by the Project Manager.

Approved By:	Date Approved:
 Priscilla L. Kernek Associate Vice President Administration and Finance (Facilities and Safety)	