

SUBJECT: GCQuotes	Effective Date: 3/13/18	Procedure Number: FS 2015 FS0014	
	Supersedes: FS 2014 FS0011	Page 1	Of 5
	Responsible Authority: 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 projects outside of eBuilder. Quotes that are solicited using eBuilder shall be governed by the EBQuotes procedure.

DEFINITIONS:

CC: Certificate of Completion

CO: Certificate of Occupancy

DOPO: Direct Owner Purchase Order

eBuilder: software used by Facilities and Safety for project management

GCQuotes: an email mailbox used by UCF to request and receive bids, quotes, and related correspondence in order to ensure fair competition among companies

GCQuotes Manager: a Facilities and Safety employee assigned by the Associate Vice President to process GCQuotes

GCQuotes Assistant: a Facilities and Safety employee assigned by the Associate Vice President to assist with and verify submittals

GCQuotes Bid Form: a standard form 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 (SOW) of the project and the management of the work to be performed

Quality Management & Improvement: processes and personnel put in place to measure and assure quality of products and services, and to ensure that products and services meet expectations

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

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 SOW

PROCEDURE STATEMENT:

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

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

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

Award decisions shall be made within 30 days of quotes or bids to avoid expiration.

GCQuotes is not intended to govern emergency purchases. Instead, emergency purchases shall follow the requirements of the UCF Purchasing Procedure Manual.

PROCEDURE:

1. The Project Manager shall 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 shall develop, or have developed, a detailed SOW that shall be used to solicit bids or quotes. The SOW shall 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 SOW
 - c. Project schedule, including working hours
 - d. Project logistics, including building access, parking, and other project specific items that will affect the SOW
 - 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 SOW

3. The Project Manager shall email the detailed SOW to gcquotes@ucf.edu for processing. All correspondence to GCQuotes must have the minor project number in the subject line of the email. The email shall also include the date and time of the onsite walk-through and the department's GCQuotes Bid Form, as well as the requested deadline for response to the university (generally 5 – 7 business days). The Project Manager shall not contact the contractors directly to solicit quotes.
4. The GCQuotes Manager shall meet with the assigned F&S department representative to resolve any concerns with the SOW.
5. The GCQuotes Manager shall email the SOW, any pertinent documentation, and the GCQuotes Bid Form to the contractors to request a bid or quote to perform the work.
6. All Bid Clarifications (BCs) concerning the SOW shall be sent to gcquotes@ucf.edu. The GCQuotes Manager shall forward the BC to the Project Manager. The Project Manager shall provide a clarification to the GCQuotes Manager within the time frame listed in the quote manual. The GCQuotes Manager shall forward the BC and the answer to all companies asked to quote or bid within 24 hours of receipt from the Project Manager.
7. The contractors must email their quotes, with the project name in the email subject line, to gcquotes@ucf.edu by the submission deadline. Quotes emailed to anyone other than the GCQuotes Manager shall be disqualified.
8. Quotes not submitted on the GCQuotes Bid Form provided with the quote request shall be disqualified.
9. The quotes or bids for a particular project shall all be opened on the same date at the same time, at the close of business on the deadline date or earlier in cases where quotes or bids from all of the continuing service contractors have been received in advance of the deadline, or at the beginning of the next business day. The date and time shall be affixed to the quotes or bids and signed by the GCQuotes Manager and a designated assistant as quotes or bids are opened.
10. The GCQuotes Manager shall email the quotes to the Project Manager and department director for review.
11. The Project Manager shall 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 shall either: 1) schedule and

attend a meeting with the GCQuotes 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 emails, copying the GCQuotes Manager on all correspondence. Under no circumstances shall UCF make decisions or assumptions about the cost inclusions or exclusions, and at no time shall 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 shall disqualify its quote.

12. After thoroughly reviewing and scoping all bids, the Project Manager shall make a recommendation to the GCQuotes Manager to award the project to a selected bidder.

This recommendation must include the following:

- a. A statement from the Project Manager that the recommended company has verified that they can perform the work at the recommended award amount, and within the specified timeframe
- b. A list of any exceptions or exclusions; if none, a statement that there are no exceptions or exclusions
- c. A statement that the recommended bidder has included compliance with the UCF Standards

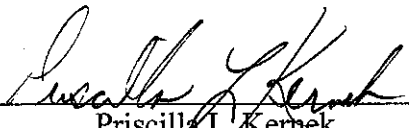
The Project Manager shall recommend an award within 30 days of receipt of quotes or bids, or the project shall be cancelled.

13. The recommendation from the Project Manager and the recommendation from the GCQuotes Manager shall be forwarded by the GCQuotes Manager to the director, stating that the project has been scoped in accordance with this procedure. The recommendation shall identify the quotes or bids from all responding companies to include: the base quote, allowances, alternates, bond when applicable, permitting amount, acceptance statement from the requester that monies are in the account and are sufficient to cover the project, and signature from both the GCQuotes Manager and the Project Manager stating that the project has been scoped in accordance with this procedure. Upon receipt of director approval, the GCQuotes Manager shall email the notice of award to all companies and to the Project Manager within two (2) business days, listing the project quotes for each responsive company.

14. After receiving director approval through the GCQuotes Manager, the Project Manager shall produce a funding request form for the client, including construction costs, UCF

departmental costs (FP&C, UCF IT, UES, FO, etc.), and permit costs. This form shall be sent to the client representative with a request that funds be transferred for the project.

15. The Project Manager shall coordinate with the F&S Business Office to generate a purchase order for the selected contractor.
16. The Project Manager shall email gcquotes@ucf.edu and the contractor awarded the project and provide the PO number.
17. GCQuotes personnel shall maintain a spreadsheet of bids received by the contractors and the projects awarded to each contractor.

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