SUBJECT:	Effective Date:	Procedure Number:	
GCQuotes	9/11/2015	FS 2015 FS0014	
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	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.

DEFINITIONS:

CC: Certificate of Completion

CO: Certificate of Occupancy

DOPO: Direct Owner Purchase Order

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 of the project and the management of the work to be performed

Quality Assurance/Quality Control (QA/QC): processes and personnel put in place to measure and assure quality of products and services, and to ensure that products and services meet expectations

Request for Information (RFI): 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.

GCQuotes is to be used solely for the purpose of establishing a price for funded projects and will not be used for obtaining estimates. When GCQuotes 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 of quotes or bids to avoid expiration.

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

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 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

3. The Project Manager will email the detailed Scope of Work 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 will 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 will not contact the contractors directly to solicit quotes.

4. The GCQuotes Manager will meet with the assigned F&S department representative to resolve any concerns with the Scope of Work.

5. The GCQuotes Manager will email the Scope of Work, any pertinent documentation, and the GCQuotes Bid Form to the contractors to request a bid or quote to perform the work.

6. All Requests for Information (RFIs) concerning the Scope of Work will be sent to gcquotes@ucf.edu. The GCQuotes Manager will forward the RFI to the Project Manager. The Project Manager will provide a clarification to the GCQuotes Manager within the time frame listed in the quote manual. The GCQuotes Manager will forward the RFI 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 will be disqualified.

8. Quotes not submitted on the GCQuotes Bid From provided with the quote request will be disqualified.

9. The quotes or bids for a particular project will 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 will 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 will email the quotes to the Project Manager and department director for review.

11. The Project 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 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 will UCF make decisions or assumptions about the cost inclusions or exclusions, and 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.

12. After thoroughly reviewing and scoping all bids, and obtaining approval by department leadership, the Project Manager will 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 will recommend an award within 30 days of receipt of quotes or bids, or the project will be cancelled.

13. The recommendation from the Project Manager and the recommendation from the GCQuotes Manager will be forwarded by the GCQuotes Manager to the AVP, stating that the project has been scoped in accordance with this procedure. The recommendation will 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 AVP approval, the GCQuotes Manager will 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 AVP approval through the GCQuotes Manager, the Project Manager will produce a funding request form for the client, including construction costs, UCF departmental costs (FP&C, OIR, CS&T, FO, etc.), and permit costs. This form will be sent to the client representative with a request that funds be transferred for the project.

15. The Project Manager will coordinate with the F&S Business Office to generate a purchase order for the selected contractor.

16. The Project Manager will email gcquotes@ucf.edu and the contractor awarded the project and provide the PO number.

17. GCQuotes personnel will 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)	9/11/15