

SUBJECT: Process for Advertisement and Selection of Design Professionals and Construction Firms	Effective Date: 12/20/17	Procedure Number: FS 2017 FPC0022	
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	Responsible Authority: Director, Facilities Planning & Construction		

APPLICABILITY/ACCOUNTABILITY:

This procedure applies to all Facilities & Safety (F&S) awards for selecting Professional Services, Construction Management, General Contracting, Trade Services, and Design-Build Services for the University of Central Florida.

PROCEDURE STATEMENT:

The purpose of this procedure is to describe the manner in which design and construction advertisements and selections will be handled.

BACKGROUND:

The Resource Management Construction Specialist (RMCS) will advertise at the direction of the F&S directors or the F&S AVP to: initiate a major project, add a professional service, or add a trade vendor. Additionally the RCMS will systematically advertise for continuing or professional services categories prior to expiration of existing continuing services contracts. The RMCS will advertise for services to design and construct Major Projects >\$2,000,000 and Minor Projects <\$2,000,000 in support of the University’s goals and objectives. Current Continuing Services Contractors and Continuing Services Professionals, as well as advertisements for these services, can be found at <http://fp.ucf.edu/vendor-information>.

PROCEDURES:

1. The RMCS will create and label a folder in the F&S Network Drive for each new advertisement.
2. The RMCS will email an advertisement template and a Project Fact Sheet template to the appropriate F&S director to obtain information needed for the advertisement.
3. The director will complete the project description sections of the advertisement template and Project Fact Sheet template and provide any additional project-specific questions that must be answered by the firms within their proposals. The Project Fact Sheet should provide sufficient detail for a firm to evaluate and determine their interest in submitting. The director will return the project template to the RMCS.

4. The RMCS will review the template for accuracy, and if necessary, meet with the director for clarification.
5. The RMCS will meet with the Associate Vice President for Administration and Finance (Facilities & Safety) (F&S AVP) to review the advertisement and Project Fact Sheet. The F&S AVP will review the advertisement and Project Fact Sheet. Upon AVP approval, the RMCS will scan the Project Fact Sheet and save it in the project folder on the F&S Network Drive. If the F&S AVP disapproves the advertisement and Project Fact Sheet, the RMCS will route it back to the appropriate director for edits before being approved by the F&S AVP.
6. The RMCS will advertise in the Florida Administrative Weekly and on Bonfire for a minimum of 30 days, and not to exceed 45 days. The RMCS will also send the advertisement to the FP&C Technical Coordinator for posting on the FP&C website and to the UCF Procurement Services Department for possible posting. The RMCS will advertise in the Florida Administrative Weekly by submitting the information at <https://www.flrules.org/>, and through Bonfire at <https://ucf.bonfirehub.com/opportunities/XXXX>. The Bonfire posting will include the advertisement, the Project Fact Sheet, and any additional forms that are required as part of the proposal (e.g., Professional Qualifications Supplement (PQS) and Construction Management Qualifications Supplement CMQS).
7. The firms will submit their proposal as instructed in the advertisement: either electronically through Bonfire or delivered directly to FP&C in Facilities & Safety, Building 16A, in hard copy format. The proposal submission date and 5 p.m. closing time are strictly enforced: Bonfire will not allow submissions past 5 p.m., and firms delivering hard copies to FP&C must sign a log indicating the date and time their submission was delivered. Any submissions hand-delivered by either a representative of the firm or by a third-party delivery company will not be accepted after 5 p.m. The RMCS will maintain the log and verify that the deadline was met, and the FP&C Administrative Assistant will provide back-up in the absence of the RMCS.
8. The RCMS will develop a scoring matrix that assigns possible points for all items required in the Project Fact Sheet Selection Criteria section, and will review the scoring matrix template with the F&S AVP to determine if it accurately reflects scoring of the criteria. This may result in questions and points being added to the template. Upon approval, the F&S AVP will sign the scoring matrix, and the RMCS will scan and save it in the appropriate folder on the F&S Network Drive.
9. The RMCS will ask the F&S AVP for names of the selection committee members.
10. The F&S AVP will send the names of the selection committee members to the RMCS.
11. The RMCS will download the proposals from Bonfire or obtain hard copies.
12. The RMCS will notify the committee members via email that they have been selected and provide the names of the firms that submitted proposals. The RMCS will obtain a completed Disclosure of Conflict of Interest – UCF F&S Selection Committee Form from each

committee member before distributing the proposals. Committee members will complete a disclosure form each time they are on a selection committee.

13. The committee members will sign the form and return it to the RMCS. In cases where there is a conflict, the committee member will recuse himself or herself. (The F&S AVP will then select a new committee member.) The RMCS will scan and save the Disclosure of Conflict of Interest forms in the appropriate folder on the F&S Network Drive.
14. The RMCS will work with the selection committee members to determine possible dates for the shortlist meeting.
15. The RMCS will provide the following to the selection committee members: the proposals, either on a thumb drive, as a link to the F&S Network Drive, or in hard copy; the advertisement and Project Fact Sheet; the scoring matrix; the scoring due date; and the anticipated shortlist meeting date.
16. The F&S AVP will meet with selection committee members who are scoring proposals for the first time to provide them with a tutorial. At least annually, refresher training will be provided to selection committee members. Training sessions will be documented with sign-in sheets and training minutes. The F&S AVP may delegate this responsibility to the RMCS.
17. The selection committee members will score the proposals independently, sign each firm's scoring matrix, and turn in hard copies of the scoring matrices, along with their overall rankings, to the RMCS by the due date.
18. The RMCS will scan the scoring matrices and save them in the appropriate folder on the F&S Network Drive.
19. The RMCS will compile the scores in a spreadsheet, by firm and by committee member, identifying individual committee members' scores and ranks.
20. The RMCS and the selection committee will attend the short-list meeting. The RMCS will present the compiled scores, and the committee members will verify their individual scores. Committee members are allowed to discuss the scores and rankings at this time and may introduce fact-based influences, such as past performance. The committee will determine the number of firms to short-list, using BOG regulation minimums, and the length of the interviews.
21. The committee members will sign and date the short-list form that lists all the firms in rank order.
22. The RMCS will compose a letter to the University President that recommends the short-listed firms. The F&S AVP will sign the letter and forward it to the Vice President, Administration & Finance (VP A&F) for approval. Upon approval, the VP A&F will submit the letter to the University President for approval. Upon approval, the letter is returned to the RMCS. The RMCS will scan and save the letter in the appropriate folder on the F&S Network Drive.
23. The RMCS will notify the short-listed firms by phone, and will send a letter to all firms, notifying them of the short-list. After reaching all of the short-listed firms, the RMCS will provide the list to the FP&C Technology Coordinator for posting on the FP&C website.
24. The FP&C Technology Coordinator will publish the short-list on the FP&C website.

25. The RMCS will instruct the RM Office Manager to complete reference checks on each short-listed firm.
26. The RMCS will schedule the firms without regard to ranking or time preference, unless a firm specifically asks for “morning” or “afternoon” because of a prior commitment on that same date. The selection committee and the RMCS will meet with each short-listed firm on the scheduled day and time.
27. The RCMS will provide each committee member with a packet containing an agenda, a score sheet, and a minimum of three attempted reference checks for each firm. The RMCS will scan the complete packet and save it in the appropriate folder on the F&S Network Drive.
28. At the conclusion of the presentations, the committee members may discuss the firms’ presentations. The committee will independently rank the short-listed firms, and then, as a group, review the overall rank points, addressing any fact-based issues before determining, as a committee, the final rank recommendation. Each committee member will give his or her score sheets to the RMCS. The RMCS will also capture the final ranking chart, either photographically or in hard copy.
29. The RMCS will compile all of the scores into a summary spreadsheet of both scores and rankings and prepare a final ranking sheet.
30. The committee members will verify the scores and ranks and sign the final ranking sheet, which becomes the basis for a recommendation to the President.
31. The RMCS will compose a letter to the University President that recommends the final firm(s). The F&S AVP will sign the letter and forward it to the Vice President, Administration & Finance (VP A&F) for approval. The VP A&F will submit the letter to the University President for approval. Upon approval, the letter is returned to the RMCS. The RMCS will scan and save the letter in the appropriate folder on the F&S Network Drive.
32. The RMCS will notify the selected firm(s) via phone, and will send a letter to all short-listed finalists, notifying them of the award. After reaching all of the short-listed firms, the RMCS will provide the list to the FP&C Technology Coordinator for posting on the FP&C website.
33. The FP&C Technology Coordinator will publish the final award on the FP&C website.
34. The RMCS will send the appropriate contract to the firm(s) awarded the contract. The executed contracts are stored in Cobblestone, and the RMCS will scan and save a copy of the contracts in the appropriate folder on the F&S Network Drive.
35. The RMCS maintains a spreadsheet of continuing service contracts on the F&S Network Drive, by category and firms, to include contract expiration dates.
36. The RMCS will schedule debriefing meetings with non-selected firms and committee members, as requested by the firms.

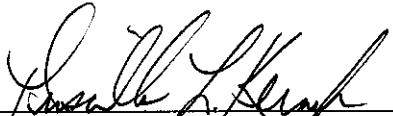
REFERENCES

Board of Governors (BOG) Regulations:

- 14.004 Public Announcement Requirements
- 14.005 Certification and Competitive Selection of Professionals
- 14.0055 Certification and Competitive Selection for Construction Management Services and Design-Build Services
- 14.021 Procedures for Construction Contract Bidding and Award

Disclosure of Conflict of Interest – UCF F&S Selection Committee Form

FS2016 FPC0020 FP&C Selection Procedures

Approved By:	Date Approved:
 Priscilla L. Kernek Associate Vice President Administration and Finance Facilities and Safety	12/20/17