

FPC PROJECT MANAGEMENT GUIDE

PMG-C02: BIDDING AND AWARD OF CONSTRUCTION TRADE CONTRACTS (CM/DB)

PURPOSE: To describe the bidding and award process for major project trade packages under Construction Management (CM) or Design Build (DB) builders.

A. Bid Packages

Before the pre-qualification and bidding processes begin, the CM/DB shall provide its proposed structure of trade/bid packages to the Professional and UF FPC PM for review and input. In subdividing the Work, the CM/DB shall consider industry standards, the technical scope of the project, schedule, small/minority business outreach efforts, and any other considerations the CM/DB – in its professional judgment – believes are appropriate.

Prior to beginning the trade contractor pre-qualification process, the builder shall provide its project-specific pre-qualification forms and a complete list of the name/number and scope of each trade package to the UF FPC PM and SBVDR (Small Business & Vendor Diversity Relations) for review and input. SBVDR will encourage appropriate small/minority businesses to participate and otherwise assist the CM/DB in its outreach efforts. Additionally, the CM/DB should encourage larger trade contractors to obtain qualified small business participation within its scope of work.

Additionally, the CM/DB shall provide draft bid packages to the Professional and UF FPC PM for review and input. Such documents, which typically explain the particular scope of each trade package, shall be tailored to the project and to work at UF in general. The bid documents must also include or reference the “front end” specs and General Terms & Conditions of the construction documents, both of which apply to all trade contractors. Bid documents should also call attention to LEED-related requirements on projects where LEED certification is being pursued.

B. Advertisement and Pre-Qualification Process

The CM/DB shall evaluate the standing, capability, staffing, and past performance of prospective trade contractors prior to bidding. For packages that the CM/DB intends to bond, the pre-qualification process must include verification of each bidder’s bondability.

The pre-qualification process can and should be undertaken before the formal Notice To Proceed (NTP) for construction is issued by UF, but no bids may be opened prior to such NTP. The advertisement for pre-qualification should be distributed widely enough to garner interest from a variety of qualified potential bidders to facilitate competitive pricing for the benefit of the University. The solicitation(s) shall be run, at a minimum, in trade publications in the region where the project is located. The advertisement(s) shall be updated throughout the pre-qualification process as necessary to clarify scope, dates, and other information, with copies of all advertisements provided to the UF FPC PM.

Upon completion of the pre-qualification process, the CM/DB shall provide a complete roster of qualified bidders (by trade package) to the UF FPC PM and SBVDR.

See PMG-C03 for requirements related to self-performed work.

C. Pre-Bid Meetings

Pre-bid meetings and/or site visits may be held for certain trade packages depending on the scope, complexity, schedule, and other demands of the project. The CM/DB shall make the determination in consultation with the Professional and the UF FPC PM, each of whom may attend such meetings. The CM/DB shall record minutes during pre-bid meetings and shall assist the Professional in developing post-meeting addenda as needed to clarify the intent of the construction documents.

D. Bid Process and Format

The CM/DB shall publish and distribute a schedule of all bid deadlines to the bidders, the Professional, and UF (FPC and SBVDR). This schedule should be consistent with the construction schedule itself so that "early start," critical, and/or long-lead trades are bid and awarded first. The CM/DB shall also provide to the Professional and UF a schedule of bid openings, each of which must be attended by the UF FPC PM and/or Contract Administrator

In preparing for each bid opening, the CM/DB shall draft a Bid Tabulation spreadsheet for each trade package using the FPC template forms. Actual bids should be provided on the CM/DB's forms, but bidders shall be required to itemize the value of materials and sales tax to facilitate Owner Direct Purchase of certain items.

All bids are to be received in a SEALED envelope by the CM/DB, who shall record or time-stamp each bid to verify timely submission. As bids are opened and read aloud by the CM/DB, each base bid and alternate or unit price number shall be recorded by both UF FPC (PM or Contract Administrator) and the CM/DB. Results of the bid opening are confidential unless required by law to be disclosed.

E. Post-Bid Review

The CM/DB may conduct post-bid discussions with the lowest and other responsive bidders as needed to confirm accurate pricing and a mutual understanding of the scope(s) of work. Such meetings shall take place within 10 business days of the bid opening, and the UF FPC PM and/or Contract Administrator shall be invited to attend.

The CM/DB shall determine if bidders – particularly the prospective awardee – properly included or excluded contractually-required work in its original bid. If not, **all** bidders shall be afforded the opportunity to revise and/or clarify their bids by providing such revisions or clarifications in writing in a SEALED package that shall be received and opened in a manner identical to the original bid process. The CM/DB shall obtain written confirmation from any bidders who elect to not revise their original bids.

With the exception of multiple package discounts and packages worth \$100,000 or less, CM/DB may not accept revised bids which have increased by more than 3% during this post-bid review or "scoping" process without written explanation by the CM/DB and written acknowledgment by the UF FPC PM.

All post-bid price adjustments and related correspondence, notes, etc. shall be in writing and included in the bid package file.

F. Bid Tabulation & Award Recommendation

When the analysis of bids, including any post-bid reviews, is complete, the CM/DB shall formalize its recommendation for award. At a minimum, such recommendation shall include finalized Bid Tabulation and Bid Award & Analysis forms using the FPC template forms. The process is finalized with signatures by the CM/DB and the UF FPC PM acknowledging both the bid results and the recommendation for award. The following shall be included – for each trade package – in one or more binders to substantiate the entire bid and award process:

- a. Bid Award and Analysis form (executed)
- b. Initial Bid Tab Summary (original from time of bid)
- c. Final typed version of the Bid Tab Summary, including notation of all invited bidders who declined to bid
- d. Bid comparison/analysis form to document initial bid and post-bid adjustments for all bidders
- e. Original bids from each bidder

- f. Written post-bid pricing revisions
- g. Relevant post-bid correspondence (from each bidder)
- h. Scope description (definition of work) for that trade package
- i. Documentation of all small/minority business outreach efforts

NOTE: Where circumstances require it, award may be to other-than-low responsive and responsible bidders, but the award recommendation shall elaborate on the reasons for, and justification of, such awards.

G. Bid Savings and Formalization of Award

To document the award of trade contracts, CM/DB will prepare a change order to the Agreement for Professional's and Owner's review. Variances between the GMP estimate for each trade package and the actual award amount for same are annotated on the change order.

See Owner's policy on change orders for more information.