

# **Contracting and Procurement – Policy Clarification Document**

July 19, 2018

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## **Task Order Contracting – Clarification for Pre-Construction Services Contracting:**

May 29, 2018

Pre-Construction services cannot be awarded using the direct award construction contracting method. Options for contracting pre-construction services utilizing a task order contract are outlined below:

### **Pre-Construction Services Integrated into Original Task Order Construction Contract:**

This contracting method is to be used when pre-construction services can be contracted at the same time as the construction work.

\* Issue an original task order contract for the preconstruction work and construction scope of work. Single task order contract for both services.

### **Pre-Con Services LESS than \$75K, Contracted Separate From Construction**

This contracting method is to be used when pre-construction services are needed before you are ready to contract the construction work for pre-construction services **<\$75K**

\* Use a general consulting contract, up to \$75K direct award, for pre-construction consulting services.

\* Award an original stand-alone task order contract for the construction scope of work.

### **Pre-Con Services GREATER than \$75K Contracted Separate From Construction**

This contracting situation is to be used when pre-construction services are needed before you are ready to contract the construction work for pre-construction services **>\$75K**

\* Use an IDIQ for pre-construction work.

\* Award an original stand-alone task order contract for the construction scope of work.

## **IDIQ Contracting – Clarification for Add Services:**

May 29, 2018

When it is necessary to modify the scope of work in an executed IDIQ Exhibit A contract, a professional services contract amendment form should be utilized to revise the contract. Project Managers should not execute a second IDIQ Exhibit A for additional work within the same AIM project number.

## **Facilities Design Fee Policy Clarification**

May 29, 2018

### **Design Fee for Hybrid Design Jobs (Partial Work by External Consultant)**

Customer will be charged the Facilities design fee **plus** the cost of any external consultant fees. Customers should be advised that this is less costly than contracting out all of the design fees to external customers.

### **Design Fees when External Consultant is Providing Interior Design Services**

If there is an external design consultant on the project, who is under contract to provide interior design services, no Facilities design fee will be charged for Facilities interior design support (furniture order review, design review, entering orders, attending meetings, etc.) Facilities interior design support will be covered by the Facilities project management fee.

Procedure: When a PRF is issued, unless otherwise noted, it is assumed that Facilities fees for interior design service will be charged to the project. As soon as a decision is made to use an outside design firm for interior design, the project manager should promptly notify Facilities accounting, so the fee spreadsheet can be updated. This is necessary to ensure that fees are not charged to the project for Facilities interior design services.

## **RFPQ Selections – Approval Policy**

July 19, 2018

The Vice President of Facilities must approve all RFPQs by signature on the summary score sheet. All jurors must sign the summary score sheet. In addition to signatures, the names of each juror should be printed (legible) on the summary score sheet. Names and signatures should not be included on individual juror score sheets.

The project manager should submit the summary score sheet, signed by the VP of Facilities, as well as all back up juror score sheets by email when sending the Final Selection Announcement to the contract administrator to post. Do not include these documents in Image Now when routing the contract.

The project manager should maintain a copy of all procurement documents on the P:Drive in the project file folder. This includes the final RFPQ, addenda, supplemental documents provided as a part of the RFPQ process, sign in sheets for mandatory site visits, juror score sheets, signed summary score sheet, and any other related procurement documents.

## **Emergency Approvals to Proceed + Expediting Contracts – Policy Clarification**

July 18, 2018

### **BASE CONTRACT / ORIGINAL CONTRACT:**

#### **Emergency Approval to Proceed:**

The Vice President of Facilities (VPF) must sign a justification form for any situation where a contractor or consultant must proceed with work prior to the issuance of a notice to proceed / final contract execution. **Significant extenuating or emergency circumstances** are required to request this authorization. Examples might include encountering a hazardous material that needs to be immediately contained and abated, a flood in an occupied floor requiring immediate remediation, etc. In such situations, the following procedure shall be followed:

- The project manager should prepare the justification form for signature.
- A valid certificate of insurance **must** be on file with the contract administration team before allowing a contractor or design team to proceed. Contract administrator's signature is required on the form confirming a current COI is in place.
- The justification form should be submitted for review by the VPF. If the VPF has signed off on the justification form, a verbal authorization to proceed may be provided to the consultant or contractor by the project manager.

The contract must be expedited in Image Now – see below. Invoices may not be submitted that pre-date the NTP date for the executed contract.

#### **Expediting a Contract:**

In situations where a contract is an extremely high priority and must be expedited to the front of the Image Now queue for immediate processing, the following procedures shall be followed:

- Project manager prepares a justification form to be signed by their manager.
- Justification form is included as the front page of the contract in Image Now.
- Select YES on the Expedite pull down menu in Image Now. Note that managers reviewing contracts in Image Now will change the Expedite pull down to NO if a signed form is not included, and the contract will not be expedited.

### **ADD SERVICES / CHANGE ORDERS to ORIGINAL CONTRACT:**

#### **Proceeding Prior to NTP:**

Whenever possible an add service or change order should be executed prior to the start of additional work. A project manager should not authorize a consultant or a contractor to proceed with a change order or add service unless the following criteria have been met:

- An agreed upon scope of work, total cost, and schedule impacts that includes a revised completion date have been received in writing.

- The add service or change order should be entered in Image Now as soon as possible following verbal authorization.
- Invoices should not be submitted or paid for the added work, until the NTP is issued for the add service or change order. A contractor or consultant should **not** be allowed to bill ahead on the base contract to cover the pending add service or change order costs.