Standard Operating Procedure (SOP)
Open End Task Order (OETO) Process

SOP No. AS-2001
Revision: 0
Department: Administrative Support
Date: 8/08/07
Dept. Head Approval: [Signature] 8-9-07
Director Approval: [Signature] 8/13/07

Purpose
To establish guidelines for the Open End Task Order process to ensure consistency throughout Facilities Management.

Responsibility
1. The following people are responsible for following this SOP.
   1.A. Managers
   1.B. Project Managers
   1.C. Operations Coordinators
   1.D. Operations Managers
   1.E. Assistant/Associate Directors
   1.F. Director
   1.G. Purchasing

Definitions
1. Open End Task Order (OETO): A formal request, containing detailed specifications, to a list of vendors with an open-end contract asking for a lump sum bid on satisfying those specifications.
2. TMA: Facilities Management’s computer maintenance management system/work order system.
3. MAP: West Virginia University’s official accounting system.
4. A/E: Architect and Engineer
5. PM Dashboard: Homepage website for Project Managers.

Procedure
1. Project design is complete and project is ready to be bid on the Open End.
2. Open End Task Order Solicitation form (see Exhibit A) is initiated and completed by the Project Manager (PM) and submitted to the Operations Coordinator (OC).
3. The OC creates a project requisition in TMA tied to the TMA project number.
5. The EBO enters the TMA report into MAP creating a MAP requisition.

6. OC submits Open End Task Order Solicitation form, and supporting documents to Purchasing.

7. Purchasing assigns an RFB number and e-mails the RFB number to the OC and PM.

8. Purchasing posts the Open End Task Order on the WVU website and to the PM Dashboard.

9. A pre-bid meeting is held and the PM generates the meeting minutes.

10. PM prepares each addendum. First addendum must be issued the day after the pre-bid meeting.

11. Addendums are sent to Purchasing for review and approval.

12. Once approved Purchasing notifies the PM.

13. Purchasing posts addendum on website and PM Dashboard.


15. Purchasing prepares a bid tab (see Section V Exhibit A) and sends to the PM for acceptance of the low bid.

16. PM reviews bids and accepts low bid and forwards to Purchasing.

17. Purchasing issues a Notice of Intent to Award to the successful bidder/vendor.

18. Vendor has 10-calendar days to return contract documentation to Purchasing.

19. Purchasing prepares the Purchase Order (PO) and sends the executed copy to the Vendor.

20. Purchasing posts PO on the PM Dashboard.

21. OC or PM issues the Notice to Proceed to the Vendor (see Exhibit B).

22. Process Complete.

References

1. PM Dashboard: All referenced forms can be found on the PM Dashboard
   http://intranet.finance.wvu.edu/dashboard/login.cfm
West Virginia University

Request for Open End Task Order Solicitation

SECTION I

Project Information

Project Title: ______
Project Site (Department): ______
Project Location: ______
Address: ______

City: ______  State: ______  Zip: ______
TMA Project #: ______  TMA Req. #: ______  Oracle Req. #: ______

Project Manager: Charlie Robison  Email: ______
Phone Number: (______) - Ext. ______  Fax Number: (______) - ______

SECTION II

Task Order Trade Request: (Mark All That Apply)

<table>
<thead>
<tr>
<th>Project Trade Group Solicited</th>
<th>Budget Construction</th>
<th>Budget FF&amp;E</th>
<th>Budget Permits/Fees</th>
<th>Budget Soft Costs</th>
<th>Budget Physical Plant</th>
<th>Budget Contingency</th>
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<tbody>
<tr>
<td>Prime General</td>
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<td>Prime Mechanical</td>
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</table>

Full funding in place?  YES ☐  NO ☐
Proceed with Bid; Authority Obtained?  YES ☐  NO ☐

SECTION III

Architect Information

All work shall be in accordance with the Plans and specifications prepared by: _____

Plans & Spec Distribution by:  FTP Site:  Contact A/E: ☐

Contact (Architect/Engineer in Charge): ______
Address: ______  ______  ______

City: ______  State: ______  Zip: ______
Phone Number: (______) - ______  Fax Number: (______) - ______  Email: ______

Amount of deposit for each set of drawings and specifications: _____

Refundable ☐  Non-Refundable ☐

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# SECTION IV  
## Scope of Work

Please give a brief description below – (Indicate All Documents Provided/Attached: Check All that applies)

- [ ] Project Manual A/E
- [ ] Drawings A/E
- [ ] In House Owner Manual
- [ ] In House Drawing

Brief Description:  

Provide information regarding any alternates requested:

Alternate 1: (Add □  Deduct □) Description:  

Alternate 2: (Add □  Deduct □) Description:  

Provide information regarding any Unit Prices requested:

<table>
<thead>
<tr>
<th>Description</th>
<th>Unit Measure</th>
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<td>10.</td>
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</table>
Prevailing Wage Rates

The successful bidder and all subcontractors must pay the higher of the U.S. Department of Labor Minimum Wage Rates or the West Virginia Division of Labor Wage Rates as established for Kanawha (pick county that applies), pursuant to West Virginia Code 21-5A, et. Seq.

Performance, Payment, and Maintenance Bonds

The successful Bidder will be required to furnish, at the Bidder's expense, a Performance Bond and a Labor and Material Payment Bond for One Hundred Percent (100%) of the contract award and, if applicable, a two (2)-year roofing Maintenance Bond for the full value of the roofing system. Countersignature by a resident agent of the State of West Virginia is no longer required; however, bonds must be executed by a company licensed to transact surety insurance in the State of West Virginia.

☐ Performance Bond  ☐ Labor and Material Payment Bond  ☐ Maintenance Bond, Full Value Roof

Liquidated Damages

The Owner will suffer financial loss if the Work is not Substantially Complete within the Contract Time. For each calendar day of delay in achieving Substantial Completion, the Contractor shall be liable for and shall pay the Owner _____ (____) (Indicated Dollars) per day, not as a penalty, but as liquidated damages. For each calendar day of delay in achieving Final Completion, the Contractor shall be liable for and shall pay half of the amount of liquidated damages stated above, plus any additional fees of the Architect and the Architect’s consultants that may accrue.

Other: _____

Contract Time

Option 1: ☐ The Bidder, if successful and awarded a Contract, agrees that all Work is to be Substantially Complete within ___ consecutive calendar days following the start date in the Owner’s written Notice to Proceed and/or Purchase Order, and agrees to achieve Final Completion within ___ consecutive calendar days thereafter.

Option 2: ☐ The Bidder, if successful and awarded a Contract, agrees that all Work is to be Substantially Complete by ___ (Indicate Date) following the start date in the Owner’s written Notice to Proceed and/or Purchase Order, and agrees to achieve Final Completion by ___ (Indicate Date).

Option 3: ☐ OTHER:

SECTION V  Invitation to Bid Required Information

Will there be a Pre-Bid Meeting? YES ☐ NO ☐, IF YES, Mandatory ☐ Non-Mandatory ☐

IF YES, Date Held: _____ Time: _____ a.m. ☐ p.m. ☐

Location: _____

City: _____ State: _____ Zip Code: _____

BOG Approval, if applicable: YES ☐ NO ☐ CPC Approval, if applicable: YES ☐ NO ☐

Due Date/Bid Opening: Location: Bids Submitted on Line – Available 8:00 a.m.

Time of Bid Opening: 9:00 pm following bid due date.

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### SECTION VI

**Procurement Section**

<table>
<thead>
<tr>
<th>WVU Buyer: Rossi Wiles</th>
<th>RFB Number Assigned:</th>
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<tbody>
<tr>
<td>Bid Release Date: _____</td>
<td>Bid Due Date: _______</td>
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</table>
| Date Bid Evaluation Provided: _______ | Due Date of Acceptance: _______

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<tr>
<th>Company Name</th>
<th>Base Bid</th>
<th>Alternate 1</th>
<th>Alternate 2</th>
<th>Alternate 3</th>
<th>Total Base + Alts</th>
<th>Variance Base Only</th>
<th>Attendance confirmed</th>
<th>Bid Bond Provided</th>
<th>Addendums Verified</th>
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Addendum 1 Date: _______ Addendum 2 Date: _______ Addendum 3 Date: _______ Addendum 4 Date: _______

Date Advertised: _______ Date Bids Received: _______ Date Results Posted: _______ Date Results Accepted: _______

Total Project Time (Advertising - Bids due): _____ Consecutive Days

Total Project Time (Advertising - PO Issue): _____ Consecutive Days
NOTICE TO PROCEED

c/o___

SUBJECT: ___

PO/CONTRACT #: ___

Dear  

You are hereby given Notice To Proceed beginning  , with all work involved in the Construction Project. As described in the contract documents, substantial completion is to be completed within consecutive calendar days which is  , with final completion consecutive calendar days thereafter which is  .

is the Project Manager assigned to the overall management of this project for West Virginia University. The Project Architect/Engineer/PM is  , and will be your primary point of contact related to technical issues regarding the scope of work contracted for under this purchase order/contract. If during the course of construction any questions or concerns arise regarding the status or approval of invoices or change orders, please feel free to contact myself or the Project Manager directly using the information provided below. As a reminder, please see that all applications/invoices for payment are sent directly to the Project Manager as identified above.

Contact Information:

PO Box 6572
Morgantown, WV 26506
(304)293-

PO Box 6572
Morgantown, WV 26506
(304)293-

Sincerely,

CC: