Standard Operating Procedure (SOP)
Request For Bid (RFB) Process

SOP No. AS-2000 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 Request For Bid 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. Request For Bid (RFB): A formal request, containing detailed specifications, to a potential vendor 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 out.
2. RFB Information 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 RFB information form, all supporting documents, and suggested vendor list to Purchasing.

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

8. Purchasing creates the final RFB document.

9. Purchasing posts the RFB on the WVU website, places advertisements, and posts on the PM Dashboard.

10. A pre-bid meeting is held and the PM or A/E generates the meeting minutes.

11. PM or A/E prepares each addendum with the standard cover sheet (see Exhibit B).

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

13. Once approved Purchasing notifies the PM.


15. If there is an A/E on the project the A/E issues the addendum. If not, the OC issues addendum.

16. Once bids are received Purchasing holds a public bid opening.

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

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

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

20. Purchasing prepares the Contract and sends to the successful bidder/vendor.

21. Vendor submits signed Contract and all required documentation (i.e. bonds, insurance, etc.) to purchasing.

22. Purchasing issues executed Contract and forwards copies to the OC and PM and posts on PM Dashboard.

23. OC or PM issues a Notice to Proceed to the Vendor (see Exhibit C).


References

1. PM Dashboard: All referenced forms can be found on the PM Dashboard
   http://intranet.finance.wvu.edu/dashboard/login.cfm
Request for Bids Submittal Form (For help at any time press F1)

**SECTI ON I**

**Project Information**

Project Title: _____

Project Department: _____

Project Location: _____

Address: _____

City: _____

State: _____

Zip Code: _____

TMA Project #: _____

TMA Req. #: _____

Oracle Req. #: _____

Project Manager: Paul Whiteman

Email: _____

Phone Number: ( ) - Ext. _____

Fax Number: ( ) - _____

**Budget**

<table>
<thead>
<tr>
<th>TASK</th>
<th>Budget Construction</th>
<th>Budget FF&amp;E</th>
<th>Budget Permits/Fees</th>
<th>Budget Soft Cost</th>
<th>Budget Facilities Management</th>
<th>Budget Contingency</th>
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<tr>
<td>BUDGET:</td>
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Full funding in place? YES □ NO □ If no, Proceed with Bid; Authority Obtained? YES □ NO □

**SECTI ON II**

**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: ( ) - Ext. _____

Fax Number: ( ) - _____

Email: _____

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

Refundable □

Non-Refundable □

**SECTI ON III**

**Scope of Work Required Information**

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 Drawings

Brief Description: _____
Provide information regarding any alternates requested:

Alternate 1: (Add □ Deduct □) Description: _____

Alternate 2: (Add □ Deduct □) Description: _____

Alternate 3: (Add □ Deduct □) Description: _____

Alternate 4: (Add □ Deduct □) Description: _____

Alternate 5: (Add □ Deduct □) Description: _____

Alternate 6: (Add □ Deduct □) Description: _____

Provide information regarding any Unit Prices requested: (Unit prices are based upon estimated qty included in base bid. Unit prices bid by bidders will be used for change order increase or decreases in actual amount consumed)

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<thead>
<tr>
<th>Description</th>
<th>Quantity Allowance</th>
<th>Unit Measure</th>
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<tbody>
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<td>2. ______</td>
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<td>9. ______</td>
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<td>10. ______</td>
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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 Monongalia County (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 System

Liquated 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: ___

Anticipated start date is within (30) days beginning after bid due date.

SECTION IV  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: ____

______,______

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

Due Date/Bid Opening:

Time of Bid Opening: 3:00 pm Eastern  Location: Public Opening – One Waterfront Place 3rd Floor Purchasing, Contracts, & Payment Services
<table>
<thead>
<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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<td>Addendum 1 Date:</td>
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<td>Addendum 2 Date:</td>
<td>□□□□□□□□□</td>
<td>Addendum 3 Date:</td>
<td>□□□□□□□□□</td>
<td>Date Results Posted:</td>
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<td>Date Results Accepted:</td>
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<tr>
<td>Date Advertised:</td>
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<td>Date Bids Received:</td>
<td>□□□□□□□□□</td>
<td>Total Project Time (Advertising – Bids due):</td>
<td>□□□□□□□□□</td>
<td>Consecutive Days</td>
<td>□□□□□□□□□</td>
<td>Total Project Time (Advertising – PO Issue):</td>
<td>□□□□□□□□□</td>
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</table>
TO: ALL BIDDERS

GENERAL NOTES:

1. This Addendum shall be incorporated as a part of the Drawings and Project Manual describing the Work for the above referenced project.

2. All bidders shall acknowledge receipt of this Addendum on the Form of Proposal located in the RFB issued by Purchasing, Contracts, & Payment Services. Failure to do so may be cause for rejection of bid.

3. This Addendum supersedes and supplements all portions of the bidding documents with which it conflicts. These Revisions supersede all previous instructions pertaining to these items.

4. Bid opening shall remain the same. Therefore, Bids shall be due on ________________________________

Supplementary Information:

END OF ADDENDUM NO.
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-

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

Sincerely,

CC: ____________________________