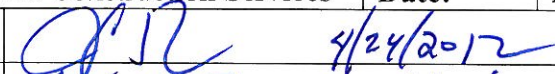



Standard Operating Procedure (SOP)
Facilities Management: Project Management Manual
General Procurement Requirements and Purchasing Dollar

SOP No.	DC-2100	Revision:	1
Department:	Design and Construction Services	Date:	April 24, 2012
Dept. Head Approval:			
Director Approval:			

Purpose/Scope

The purpose of the procedure is to inform the department of general procurement guidelines and purchasing dollar limits for purchase of materials, equipment, professional services, and construction services.

Responsibility

1. The following people are responsible for following this SOP.
 - A. All employees responsible for supporting the processing of contracting services.

Definitions

1. Purchase Order (PO)- a commercial document issued by a buyer to a seller, indicating types, quantities, and agreed prices for products or services the seller will provide to the buyer.
2. Procurement, Contracting and Payment Services (PC&PS) - buying, purchasing, renting, leasing, or otherwise acquiring any materials, equipment, services, or construction. It also includes all functions that pertain to the obtaining of said commodities, including description of requirements, selection, and solicitation of sources, and administration.
3. Construction Services- any construction, reconstruction, improvement, alteration, repair, enlargement, painting, or decorating of any building, road, bridge other structure or property owned by or located on property controlled by West Virginia University.

Procedure

The appropriate purchase orders or contracts must be issued prior to starting work or working services.

1. VISA PROCARD (P-CARD/CREDIT CARD)
 - 1.A. P-Card should be used for Materials and Supplies only and shall be limited to \$5,000. Professional and Construction services are not permitted to be charged to a P-Card. The original P-Card receipt signed by the P-Card owner and TMA Project Requisition are the required documentations to be submitted to the EBO. It is the responsibility of the individual to check with vendor for

verification of P-Card acceptance. A purchase order must be issued if a vendor does not accept P-Card.

2. PURCHASE ORDER FOR CONSTRUCTION AND PROFESSIONAL SERVICES LESS THAN \$25,000

2.A. Purchases less than \$25,000 require three (3) quotes whenever possible. WVU accepts scanned/faxed bids and should be on a company letter head and signed but signature is not required. Note: A PO issued in this manner may not exceed the \$25,000 threshold limit including all change orders. Purchases under \$25,000 requires the following documents:

- Acknowledgement of the requirement to pay prevailing wage
- Proof of Workers compensation
- Evidence that the Vendor is registered with the State
- Proof of Insurance meeting state of WV requirements
- Purchasing Affidavit
- WV State Contractor License
- State of West Virginia Construction Purchase Order terms and conditions

3. PURCHASE ORDER MORE THAN \$25,000

3.A. Purchases above the \$25,000 threshold shall be competitive bid using “Request For Bid” (RFB), “Request For Quotations” (RFQ) or “Request For Proposal” (RFP) process. These purchases must be advertised through WVU Procurement, Contracts & Payment Services (PC&PS) in compliance with West Virginia Code 5G-1 and West Virginia Board of Trustees Title 128, Policy Bulletin 54. This can be either open end bid or public bid.

3.B. Purchases above \$500,000 including change orders must be publicly bid.

3.C. All construction contracts exceeding \$25,000 require the following documents from the vendor prior to awarding a purchase order:

3.C.1. Contractor Licenses for the State of West Virginia and for the City of Morgantown (if in city limits)

- Acknowledgement of the requirement to pay prevailing wage
- Proof of Worker’s compensation
- Evidence that the Vendor is registered with the State
- Certification that the vendor is in compliance with the West Virginia Drug-Free Workplace Act (if over \$100K)
- Proof of Insurance meeting state of WV requirements
- Purchasing Affidavit
- Bid Bond
- Performance Bond, Labor and Material Payment Bond
- Maintenance Bond (if roof work is being performed)

- 3.C.2. Contract Documents:
 - AIA A101 and A201 contract with appropriate WV Supplementary Conditions if over \$500, 000
 - AIA A107-2007 contract with appropriate WV Supplementary Conditions if between \$25,000 and \$500,000
- 3.D. All capital improvement projects over \$25,000 require approval from the University Planning Committee (UPC).
- 3.E. Projects in excess of \$1,000,000 require prior approval from the BOG prior to awarding of contract/purchase order.
- 4. PUBLIC ADVERTISEMENT (RFB, RFP)
 - 4.A. Public Advertisements are issued through PC&PS.
 - 4.B. Formal Bids, RFPs, and Architectural Services are posted at the WVU Procurement Website <http://wvubids.finance.wvu.edu>, Dominion Post Newspaper, and Charleston Gazette Newspaper and other newspapers as required. Request can be made to PC&PS for additional advertisements for newspapers.
 - 4.C. Legal Notices are not advertised on Saturday, Sunday or Legal Holidays.
 - 4.D. Advertisements only appear in the newspaper one-day and posted for 14 days in the BID BOOK at PC&PS.
 - 4.E. Newspapers will only guarantee the advertisement will be published with five (5) days after receipt of advertisement. This timeline needs to be considered within scheduling pre-bid.
- 5. STANDARD CONSTRUCTION CONTRACTS
 - 5.A. WVU has standard contracts that must be used for Architectural and Engineering Design Services and Construction Services.
 - 5.B. Anything outside of WVU's standard terms and conditions with WVU supplemental conditions must be approved by the State Attorney General's office.
- 6. OPEN END/ARCHITECT/ENGINEER CONTRACTS
 - 6.A. This Open End contract mechanism is utilized for firms that have already been selected through a competitive solicitation.
 - 6.B. The contract is open to AE Services that include the following categories:

- 6.B.1. Architectural Services
 - 6.B.2. Mechanical/Electrical/Plumbing Services
 - 6.B.3. Civil Services
 - 6.B.4. Structural Services
 - 6.B.5. Hazardous Materials
 - 6.B.6. Commissioning
- 6.C. Refer to approved contract for specific requirements.
- 6.D. This mechanism can be used for contracts fees up to \$250,000 (including Change Orders).
- 6.E. Proposals can be requested from a single firm or multiple firms for projects under \$25,000.
- 6.F. Selection and award will be based on an RFP to firms on the approved Open-End list for contracts greater than \$25,000.
- 6.G. Selection can be based on qualifications, cost, or combination thereof.

7. OPEN END/TASK ORDER CONSTRUCTION CONTRACTS

- 7.A. The Open End contract mechanism utilizes a pre-approved list of vendors with Open End contracts.
- 7.B. The following are the list of categories for the Open End contracts:
- 7.B.1. General Contractors
 - 7.B.2. Mechanical Contractors
 - 7.B.3. Electrical Contractors
 - 7.B.4. Roofing Contractors
 - 7.B.5. Hazardous Materials Contractors
 - 7.B.6. Painting Contractors
 - 7.B.7. Site Work/Excavation Contractors
- 7.C. For Projects not exceeding \$500,000 (including Change Orders). PC&PS has established a web-based system to competitively bid projects within pool of pre-qualified contractors. Time from advertisement to bid opening is expedited and can be as little as Four (4) working days.
- 7.D. Refer to contract for specific requirements.

8. OTHER CONTRACT MECHANISMS

- 8.A. Other acceptable contract mechanisms include State Contracts and other established contracts. Consult PC&PS for specifics.