



# Planning & Construction Policy & Procedure # 5

**TITLE** **CONSTRUCTION MANAGER BIDDING PROCEDURES**

**OBJECTIVE & PURPOSE** To ensure appropriate FAU personnel participation and documentation of the bidding process of Construction Management Contracts

**RESPONSIBILITY** **ACTION**

- PROJECT MANAGER**
- ◆ Discuss bidding schedule with CM and establish payment schedule for A/E for bidding phase payments. Bid packages must be advertised a minimum of seven (7) days prior to opening for major projects.
  - ◆ Review CM procedures for prequalification for trade contractors.
  - ◆ Provide written response to CM request to Self-Perform work. Approval shall be based on **“FAU Guidelines for Self Performance of Work on Construction Management Project” (Attachment “A”)**.
  - ◆ Attend bid openings for each bid package and sign (witness) **Bid Tabulation Sheet (Attachment “B”)**. Arrange to have A/E of record attend bid openings. AE, CM and PM are to sign each bid tab sheet verifying information completed in Section 1.
  - ◆ Retain the initial **Bid Tabulation Sheet (Attachment “B”)** after bid opening with completed **Section 1** for each bid package, signed by all appropriate representatives (FAU, CM and AE).
  - ◆ Obtain an original signed **Bid Tabulation Sheet with completed information in Section 2** after the CM has analyzed and evaluated the various bids, and indicating their recommendation for each bid package. This document is to be countersigned by the A/E of record confirming their review and agreement with CM’s recommendation.
  - ◆ If the lowest bidder in Section 1 of the Bid Tabulation Sheet is not the recommended subcontractor, obtain a letter of justification for basis of award outlining both scope and cost adjustments.

**NOTE:**  
*It is the responsibility of the PROJECT MANAGER or Designee to attend bid openings for each bid package and to obtain the required documentation for the University’s project file.*

**REFERENCE:** ◆ FAU Agreement Between Owner & Construction Manager, Paragraph 2.2

**ATTACHMENT:** ◆ **FAU Guidelines for Self Performance of Work on Construction Management Projects – Attachment “A”**  
◆ **FAU Bid Tabulation Sheet – Attachment “B”**

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APPROVED:	Vice President	Associate V.P.	Director

## **FAU GUIDELINES FOR SELF PERFORMANCE OF WORK ON CONSTRUCTION MANAGEMENT PROJECTS**

These procedures shall be followed for all work which is neither included in the CM's fee, or competitively bid.

Paragraph 2.2 of the Agreement Between Owner and Construction Manager provides, "Unless otherwise authorized by the Owner, all Work shall be performed under Trade Contracts held by the Construction Manager. The Construction Manager shall not bid on any of the Trade Contractor Work or perform such Work with its own forces without the prior written consent of the Owner."

### **PRIOR CONSENT**

The Construction Manager must make its request to self-perform work to the university. If the university concurs, the Project Manager shall send written authorization to the Construction Manager.

Consent may be given either:

- 1) for the CM to bid on a specific portion of the Work, or
- 2) for the CM to submit a proposal for self-performance of the Work, together with three quotes from other contractors for performance of that same Work. If the CM is unable to secure three quotes due to insufficient trade contractor interest, the CM shall provide documentation of its efforts to secure the required quotes.

Items which may be considered for self-performance include, but are not limited to:

- 1) General Condition items.
- 2) Work for which sufficient scope does not exist to attract trade contractor interest, or for which the schedule for the Work spans a time period which is sporadic and broken over the duration of the Project.
- 3) Work which must be performed to eliminate safety violations or remedy emergency conditions.
- 4) Unforeseen Work for which the timing has significant and negative impact on the schedule of the project, or Work for which the Owner mandates an accelerated schedule to complete components parts of the Project (circumstances such as completeness of architectural drawings, time required to generate appropriate bid packages, and change order liability will be considered).
- 5) Portions of the Work for which the CM has a proven track record of performing such Work, and for which the participation by the CM would be advantageous to the Owner.

**ATTACHMENT "A"**

**FLORIDA ATLANTIC UNIVERSITY - BID TABULATION SHEET**

PROJECT NAME: \_\_\_\_\_ PROJECT NUMBER: \_\_\_\_\_

BID OPENING DATE: \_\_\_\_\_ BID OPENING TIME: \_\_\_\_\_

<b>SECTION 1</b>								
<i>(to be completed at bid opening – original to be retained by FAU project manager)</i>								
Bidder Name	License Number	Base Bid	Alternate #1	Alternate #2	Alternate #3	Alternate #4	Alternate #5	Alternate #6
BIDS OPENED BY: _____				BID OPENING WITNESSED BY: _____				
				Architect/Engineer (if applicable)				
				_____ University Representative				

<b>SECTION 2</b>	
<i>(to be completed by CM after analysis of Bids – original to be submitted to FAU Project Manager)</i>	
We hereby submit and recommend _____ to be awarded the subcontract for furnishing _____ for the referenced project. The budget from the GMP Cost Summary is: Line Item: _____ Amount: \$ _____  _____ Construction Manager <span style="float: right;">Architect/Engineering (if applicable)</span>	

**NOTE: IF LOWEST BIDDER IN SECTION 1 IS NOT THE RECOMMENDED SUBCONTRACTOR – CM MUST PROVIDE A LETTER OF JUSTIFICATION FOR BASIS OF AWARD OUTLINING SCOPE AND COST ADJUSTMENTS AFTER ANALYSIS AND EVALUATION OF BIDS.**

**ATTACHMENT 'B'**