THE UNIVERSITY OF MEMPHIS.
Capital Projects Management

SBC Project Manager

Confirms project documents are complete
Verifies all forms are received
Verifies **SFM** approval
Prints, completes, and signs bid request form
Director approves documents and
Provides to Contract Specialist:
1) Normally on tracking sheet:
  · Request & preference for assignment.
  · Verification of project tracking
  · **Target** & **MACC** established
  · Approval to bid, indicated by
    Director's initials; and, specifying brevity, if
    any.
2) Normally on draft of Invitation to Bid:
  · **Designer** name, address, phone, fax, contact
  · Project Name & Brief Project Description
  · Plan rooms
  · Plan deposit amount

Contract Specialist

1) Determines Bid Date:
  · Determines bid opening location
  · Considers necessary lead time & approved
    brevity
  · Verifies availability of date, time, & place
2) Assigns Bid Date:
  · marks in Bid Book monthly schedule
  · captures necessary information
  · e-mails Project Manager
3) Enters **ITB** data in **PITS**
4) Generates documentation:
  · **PITS** bid summary (to Bid Book)
  · Print a copy of procurement screen
  · Updates website bid list
5) Creates bid file with initialed project tracking
    sheet
6) E-mail sent to :
  · Project Manager
  · Location Coordinator
  · Construction Representative

Bidding Coordinator,

Frequently checks, if there have been any
changes in **Bid List,** Procurement Screen
copies bid list to:
· Bid Book

Location Coordinator

1) E-mails notice to **Designer**
2) Schedules location.
3) If conflict, tellsBidding Coordinator.

SBC Project Manager

1) Receives Bid Date from Bidding Coordinator
2) Informs Designer of Bid Date

Designer, during solicitation:

1) Receives:
  · Bid Start e-mail
  · acknowledgement of Bid date and time
2) Procurement screen updates website
    automatically
3) Informs potential bidders.
4) Distributes Bidding Documents to:
  · Bidding **Contract Specialist**
  · Construction Representative in field· Area plan
    rooms
  · Bidders of Record along with Bid Pack
5) Schedules and leads pre-bid conference.
6) Receives questions and requests for
    substitution from Bidders of Record.
7) Distributes Bid Tab at least 3 days before bid
    to Location Coordinator and Bidding
    Coordinator.

Bidding Coordinator, during solicitation:

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Construction Bidding Page 2

Designer, during solicitation:

Contract Specialist

Contract Specialist, during solicitation:

1) Reschedules bid opening, when required
2) & Receives Bidding Documents, Addenda/ Updated bidding documents
   - Enters data in **PITS**
   - keeps 1 set, binding addenda into fronts of manuals and drawings.
3) Receives preliminary Bid Tab, reviews, and notifies Designer of deficiencies

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Contract Specialist
1) Receives bid tab (f.y.i.).
2) Readies location on bid opening day.
3) Receives bids until Designer arrives

Designer
1) Arrives 30 minutes before bid opening
2) Receives and reviews Bid Envelopes
3) Approves Bid Envelopes for opening
4) Distributes copies of Bid Tab to all attending
5) Conducts bid opening and fills out Bid Tab
6) Signs Bid Tab as Designer & Presiding Official
7) Obtains Owner rep signature if present
8) Same day faxes Bid Tab to Bid Coordinator
9) Makes necessary copies for self
10) Within 24 hours, sends to Bid CoordinatorBid Tab, Bid forms, bonds, and envelopes.
11) Investigates any concerns

SBC Project Manager
1) Approves (by initialing) Designer letter of recommendation, or makes other recommendation as to disposition of bids.
2) Addresses any issues requiring **SBC** action

Contract Specialist
1) Recommendations and approvals:
   - Receives and checks.
   - Obtains Project Manager approvalof Designer recommendation.
   - Awaits **SBC** if required.
   - Enters data in **PITS**.
   - Files recommendation.
2) Resolution:
   - If rejected, closes file.
   - If awardable, initiates Contract.

Contract Specialist
1) Preliminary results:
   - Checks bids and Bid Tab.
   - Amends Bid Tab if needed.
2) Gives copy of Bid Tab to:
3) Enters data in **PITS**.
4) Files Bid Tab and Bids.
5) Secure cashier's checks.
6) Asks Designer for missing Documents
7) Verifies license, if appears awardable

- Accountant
- Director Construction
- AVP CPD
and by fax to:
- State Architect
- Dodge Reports

Bidding Coordinator
file closure when all bids rejected:
1) Enters data in **PITS**.
2) Disposes of cashier's checks.
3) Bidding Documents disposition:
   - Holds if Project Manager is certain of imminent re-use in re-bid.
   - Otherwise, gives to Project Manager
.4) 1 File disposition:
   - Holds if Project Manager is certain of imminent re-bid.
   - Otherwise, sends to main files.