GENERAL OVERVIEW
Responsible for providing architectural and engineering design, construction management and contracting services for large and small campus projects.

Projects are usually accomplished by outside contractors and managed by our in-house Project Managers.
Serves as the chief budgetary office for all GT Facilities Management construction/design projects

Responsible for all construction/design accounting transactions, including
- Project Request
- Purchase Order for Materials
- Contract Administration
- D&C Fee Billing
- Invoice Processing
- Project Budget Reconciliation
ROLE OF FACILITIES CONTRACTING OFFICERS

- Review contracts to ensure appropriate forms were used and approval signatures are present
- Check AiM Project Number and budget for accuracy
- Ensure contractor is listed in BuzzMart
- Check e-Verify status
- Verify if insurance limits meet Board of Regents (BOR) Requirements
- Assign Contract Number
- Encumber funds for contract
- Issue “Notice to Proceed”
- Enter contract information into AiM
- Process contract change orders, amendments & contract Invoices
- Closeout projects in AiM
CONTRACTING REQUIREMENTS /
FORMS OF CONTRACT
NEW CONTRACTOR REQUIREMENTS CHECKLIST

- Vendor Profile Form
- Current Certificate of Insurance
- E-Verify/ Immigration Affidavit
- Contractor Safety Performance Expectations Form
GT VENDOR PROFILE FORM

- Required to encumber funds & pay invoices for a project
- Must be updated every (3) years
- Found on GT Procurement & Business Services website at https://vpa.procurement.gatech.edu/
- For additional information or assistance, contact vendor.help@business.gatech.edu

*** Contractors may sign up for electronic payments at http://www.paymode.com/gatech ***
<table>
<thead>
<tr>
<th></th>
<th>CONSTRUCTION</th>
<th>DESIGN</th>
<th>PROFESSIONAL SERVICES (GENERAL CONSULTANT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial General Liability</td>
<td>$1M per occurrence</td>
<td>$1M per occurrence</td>
<td>$1M per occurrence</td>
</tr>
<tr>
<td></td>
<td>$2M aggregate</td>
<td></td>
<td>$2M aggregate</td>
</tr>
<tr>
<td>Automobile Liability</td>
<td>$1M per occurrence</td>
<td>$100K per occurrence for bodily injury</td>
<td>$1M per occurrence</td>
</tr>
<tr>
<td>Umbrella Liability</td>
<td><strong>Contract Value &lt; $5M</strong></td>
<td>N/A</td>
<td>$2M per occurrence</td>
</tr>
<tr>
<td></td>
<td>- $2M per occurrence</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- $4M aggregate</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Contract Value &gt; $5M</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- $2M per occurrence</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- $10M aggregate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workers Compensation</td>
<td>Employer’s Liability- $1M per occurrence</td>
<td>Employer’s Liability- $1M per occurrence</td>
<td>Employer’s Liability- $1M per occurrence</td>
</tr>
<tr>
<td>Professional Liability</td>
<td>N/A</td>
<td>Depends on Construction Cost</td>
<td>Depends on Construction Cost</td>
</tr>
</tbody>
</table>

*** Required for ALL contractors ***

COI documents can be found on the GT Facilities Website- [www.facilities.gatech.edu](http://www.facilities.gatech.edu) under “Administration” Tab (Standard Forms & Templates)
E-VERIFY (IMMIGRATION & SECURITY FORM)

- Required for **ALL** contractors who provide services greater than **$2,499.00**
- The **orange asterisk icon (**) identifies vendors in BuzzMart with active e-Verify status
- E-Verify **must be** updated annually (expiration date is based on the notarized date on form)

**Supplier Information**

AVS Builders Inc  more info... select different supplier
315 Marshy Pointe Suite 100: (preferred)
315 Marshy Pointe Suite 100
Johns Creek, GA 30097 US

---

**IMMIGRATION AND SECURITY FORM**

**CONTRACTOR AFFIDAVIT**

By executing this affidavit, the undersigned Contractor certifies in compliance with O.C.G.A. §13-10-91, that it is affirmatively shown that the Contractor identified above has implemented, and is participating in, a federal work authorization program, in accordance with the applicable provisions and deadlines established in O.C.G.A. 13-10-91.

The undersigned further agrees that, should it employ or contract with any subcontractor(s) in connection with the physical performance of services pursuant to this contract with the State, Contractor will secure from such subcontractor(s) similar verification of compliance with O.C.G.A. § 13-10-91, as the attached Subcontractor Affidavit. Contractor further agrees to maintain records of such compliance and provide a copy of each such verification to the State Entity at the time the subcontractor(s) is retained to perform such services.

**EEV / E-Verify Company Identification Number**

**BY: Authorized Officer or Agent**

**Date**

**Title of Authorized Officer or Agent of Contractor**

**Printed Name of Authorized Officer or Agent**

**SUBSCRIBED AND SWORN BEFORE ME ON THIS THE**

**DAY OF** 10

[NOTARY SEAL]

My Commission Expires:

(*See the electronic certification of work authorization program sponsored by the United States Department of Homeland Security or any equivalent federal work authorization program operated by the United States Department of Homeland Security to verify information of newly hired employees, pursuant to the Immigration Reform and Control Act of 1986 (8U.S.C. 1324a-8).*)

---

*Required for all contractors who provide services greater than $2,499.00.*
CONTRACTOR SAFETY PERFORMANCE EXPECTATIONS FORM

- Required for **ALL** general contractors/subcontractors
- Must be updated annually
- Maintained electronically by GT Facilities Management Business Office

Progressive Disciplinary Action for Violation of Safety Rules:

- 1st Violation – Written Warning/Letter in Project File
- 2nd Violation – Work stoppage at contractor’s expense; pending investigation
- Immediately Dangerous to Life & Health (IDLH)/Extreme Violation: Contractor may be suspended at contractor’s expense. Contractor may be barred from future Georgia Tech projects
# Bid & Advertising Requirements Based on Construction/Design Cost

<table>
<thead>
<tr>
<th>Cost Range</th>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $50K for Construction or ≤ $75K for A&amp;E Services…</td>
<td>Public Advertisement or Competitive Bidding is not required (Direct Award)</td>
</tr>
<tr>
<td>Greater than $50K but &lt; $100K (Construction)…</td>
<td>Competitive Bidding (Letter Bid) is required (minimum of (3) contractors)</td>
</tr>
<tr>
<td>Greater than $100K but &lt; $250K…</td>
<td>Public Advertisement on Georgia Procurement Registry (GPR) is required</td>
</tr>
<tr>
<td>Greater than or equal to $250K…</td>
<td>Public Advertisement on Georgia Procurement Registry (GPR) is required</td>
</tr>
</tbody>
</table>

Bid opening shall be no sooner than (15) calendar days after the date of posting to GPR.

Public Bid Opening, Bid, Performance, & Payment Bonds Required

***ALL construction contracts require labor***

Contracting documents can be found on the GT Facilities Website - [www.facilities.gatech.edu](http://www.facilities.gatech.edu) under “Administration” Tab (Standard Forms & Templates)
DIRECT AWARDS

- Less than $50K for Construction or $75K for A&E Services
- Supporting Documentation
  - Construction Project – Proposal/Quote
  - Professional Services – General Consultant Contract
  - Design Services – Design Professional Contract

*** ALL construction contracts require labor ***

Contracting documents can be found on the GT Facilities Website- www.facilities.gatech.edu under “Administration” Tab (Standard Forms & Templates)
LETTER BID

- Construction Projects ($50,000 - $99,999.99)
- Documentation Required:
  - Contract Title
  - Estimated Project Value
  - Project Manager
  - AiM Project No.
  - Drawings, Specs
  - Minimum of (3) Contractors
  - Site Visit Information
  - Sealed Bids Due Date (except weekends, Monday, a legal holiday, or day after legal holiday)

Note: If AIM Project Budget ≤ $200K – submit request to Ericka Thomas at ericka.thomas@facilities.gatech.edu
If AIM Project Budget > $200K – submit request to Donna Vongsouvan at donna.vongsouvan@facilities.gatech.edu

Contracting documents can be found on the GT Facilities Website - www.facilities.gatech.edu under “Administration” Tab (Standard Forms & Templates)
LETTER BID INVITATION

- Contracting Officer emails letter bid invitation along with supporting documentation to contractors listed on Letter Bid Request form

- Main components of a Letter Bid Invitation are
  - Project Name
  - Bid Contract Number and Project Number
  - Pre-Bid Conference Information
  - Project Manager Contact Information
  - Bid Opening Date and Time
  - Listing of Bid Package Submittal Documents

INVITATION TO BID
(Request for Competitive Sealed Bids)
For
“Petit IBB Building North Interconnect A/C Unit Replacement”
Bid Contract No. 0523-17 / Project No. 0999-2017

TO: E. Escher, Inc. / Max Escher max.escher@aescheimc.com
J & I Service Contractors, Inc. / Terry Hensel jandiservice@comcast.net
John F. Pennebaker Co., Inc. / Donnie McDaniell d.mcdaniel@johnpennebaker.com

FROM: Donna Vongsouvann, Facilities Contracting Officer
Kynthia Gaines, Construction Manager

You are invited to submit a sealed bid for the above referenced project. Bid documents are attached to this email.

A MANDATORY pre-bid conference is scheduled for Wednesday, February 15, 2017 at 1:30 PM at Georgia Tech Petit Biotechnology Building (IBB), Room 0404, located at 315 Ferst Drive, Atlanta, GA 30332. Kynthia Gaines will be the Construction Project Manager. You may contact her at kynthia.gaines@facilities.gatech.edu for any additional information or questions regarding this project.

Sealed bids are due by 2:00PM local time on Tuesday, February 28, 2017 in which they will be publicly opened and read aloud. Bid envelope should be marked on the outside with Name of Bidder, Project Name, Bid/Project Number, and date/time of opening. One (1) unbound original should be submitted to:
Donna Vongsouvann, Contracting Officer
Georgia Tech
Facilities Administration Building
Design & Construction Office
955 Fowler Street, NW
Atlanta, GA 30332-0410
Room 123 (First Floor)

Bid package submittal should include the following documents:
- Bid Form
- Business license and/or appropriate professional license
- E-Verify Affidavit
- Certificate of Insurance
- Contractor Safely Performance Expectation Sheet

Award will be made to the Contractor submitting the lowest responsive and responsible bid. Georgia Tech reserves the right to reject any or all bids to waive technicalities and to make an award deemed in its best interest. Georgia Tech reserves the option to negotiate terms, conditions and pricing with the lowest responsive, responsible bidder at its discretion.
GEORGIA PROCUREMENT REGISTRY (GPR)

- Construction/Design Projects ≥ $100K
- Items Needed for Posting to GPR
  - Budget for Contract
  - Form of Contract
  - Drawings/Specifications (if applicable)
- Allow 1-3 business days for posting to GPR
- Addendums cannot be issued within (5) days of bid opening without extending the bid opening date
  - For contract cost > $100K & < $250K - Bid opening shall be no sooner than (15) calendar days after the date of posting to GPR
  - For contract cost > $250K - Bid opening shall be no sooner than (30) calendar days after the date of posting to GPR
- Bid opening dates can be on any day except weekends, Monday, a legal holiday, or day after legal holiday

Note: If Contract Budget ≤ $200K: Submit documents to Ericka Thomas at ericka.thomas@facilities.gatech.edu
If Contract Budget > $200K: Submit documents to Donna Vongsouvan at donna.vongsouvan@facilities.gatech.edu
Sealed Bids are due to the Contracting Officer on the date/time specified on Bid Invitation.

All bids will be read out loud and recorded on the Bid Tabulation Sheet.

Contract will be awarded to the lowest responsive bidder.

Bid opening results for “Letter Bids” are emailed to the Project Manager and all Contractors listed on the Bid Invitation.

Bid opening results for contracts ≥ $100K will be posted on the Georgia Procurement Registry.
Highly qualified engineering firms (Consultants) are selected via Request for Qualifications (RFQ) posted to Georgia Procurement Registry.

Selected firms provide traditional and specialized engineering services, including estimating, scheduling, and construction administration.

Current Categories
- Landscape, Civil Engineering, & Survey Services
- Commissioning Agent Professional Services
- Mechanical & Electrical Engineering Services
- Lab Architectural & Engineering Services
- Cost Manager Professional Services
- Environmental Consulting Services
- Structural Engineering Services
- Architectural, Interior Design & Engineering Services
- Surveyor Services
- AV/Telecom Services
INDEFINITE DELIVERY INDEFINITE QUANTITY (IDIQ) CONTINUED

- Contract term is (1) year with a possibility of a (1) year renewal
- Consultant(s) are required to develop and deliver contract documents for one or more delivery methods:
  - Task Order
  - CM at Risk
  - Design Bid Build
  - Letter Bid
  - Direct Award
- Total fees for any single IDIQ contract cannot exceed $600,000 in any single year
- An Exhibit A form should be completed for all new Design or Construction Contract Administrative Orders
- A Design Professional Amendment form should be completed to amend an existing Design or Construction Contract Administrative Order

Contracting documents can be found on the GT Facilities Website - [www.facilities.gatech.edu](http://www.facilities.gatech.edu) under “Administration” Tab (Standard Forms & Templates)
Firms interested in providing Task Order Contractor Services for construction projects at Georgia Tech (via CM at-Risk with a GMP, Design-Bid-Build; Design-Build project delivery method) are selected via Request for Qualifications (RFQ) posted to Georgia Procurement Registry.

Projects may include:
- Renovations
- Related Building Repair & Maintenance Work

Contract term is one (1) year
- Possibility of extending the contract up to a maximum of (4) additional years

The maximum of Task Order Agreements issued, including change orders, shall not exceed $2.5M or amount outlined in the Master Task Order Contract.

Task Order Agreement (Exhibit B) should be issued for each project under the master Task Order Contract.

Performance and payment bonds are required in an amount equal to 100% for any Task Order Agreement over $100,000.

The Lump Sum Change Order Format form should be used in order to change an existing Task Order Agreement.

Contracting documents can be found on the GT Facilities Website - www.facilities.gatech.edu under “Administration” Tab (Standard Forms & Templates).
Contract Routing Via Imagenow
(1) Project Manager sends electronic copy of contract document to vendor by email. (2) Vendor signs in colored ink, scans an electronic copy of contract document back to Project Manager. (If a copy is mailed back, PM can scan to a PDF.) Project Manager prints contract to Image Now and completes contract routing form in Image Now. (3 - 5) Image Now routes contracts through Design and Construction, and Finance Director for review and approvals. (6) Facilities VP completes electronic and digital signature on contract. (7) Image Now routes to Contracting Officer based upon contract value selected by Project Manager on initial form. Insurance, vendor profiles and other information are finalized prior to approval by Contracting Officer. Contracting Officer appends contract with NTP and any other supporting documents in Image Now and approves contract. (8) Contracting Officer forwards executed contract/supporting documentation to vendor by email.
**CONTRACT ROUTING WORKFLOW PROPOSED KEYS**

*Required Fields*

- **Project No.**
  - Ex: 0257-2017
  - Do not include cost estimate number

- **Contract No.**
  - Enter “Pending” for new contracts
  - Enter assigned Contract No. for Amendments/Change Orders

- **Amendment Type**
  - Select “Original Contract” for new contracts otherwise select “Amendment, Change Order, Component Change Order, GMP Change Order, Lump Sum Change Order”

- **Amendment #**
  - Select “---” for new contracts or select the amendment/change order number (Ex. 001)

- **Vendor Name**

- **Notes**
  - Enter the vendor’s email address
  - Add any special notes for Facilities Business Department
CONTRACT ROUTING WORKFLOW
CUSTOM PROPERTIES

*Required Fields

- **Contract Title**
  - Please include a detailed title based on scope of work

- **Project Budget > $200K? OR TO?**
  - Select “Yes” if…
    - Total Project Budget is greater than $200K
    - Task Order (please select “Yes” for ALL Task Order (TO) related contracts regardless of total project budget)
  - Select “No” if …
    - Total Project Budget is less than or equal to $200K
    - IDIQ (please select “No” for ALL IDIQ related contracts regardless of total project budget)

- **Manager Name**

- **Encumbrance Amount**

- **Component Group/Component**

- **Psoft Account 1**
  - Please verify peoplesoft account number before routing contract through ImageNow

- **Amount 1**

**Note:** If the contract is to be split across more than one account, use the Psoft Account 2 & 3 fields.
COMMON REASONS A CONTRACT IS ON HOLD

- Contractor needs to complete or update Vendor Profile Form
- Certificate of Insurance (COI) has expired
- E-Verify is not active
- Contractor Safety Performance Expectations Form has expired
- AiM Project Budget needs updating
DELETING A CONTRACT FROM IMAGENOW

In order to delete a contract from ImageNow:
- Enter “Delete” in the Project No. & Contract No. fields
- Add “sticky note” for detailed explanation
- Save changes
- Close contract
## CONTRACT WORKFLOW QUEUE DECODER

<table>
<thead>
<tr>
<th>Name of Queue</th>
<th>Person Managing Queue / Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTR Return to PM</td>
<td>Project Manager who initiated the document must address corrections</td>
</tr>
<tr>
<td>CTR Return to PM - Outside Signature</td>
<td>Project Manager needs to manage hard copies of a document signed outside of Facilities</td>
</tr>
<tr>
<td>CTR Approval Start</td>
<td>Project Manager has started a contract document but it needs more information and won’t leave PM queue</td>
</tr>
<tr>
<td>CTR Design Approval</td>
<td>Gary Jelin - oversight of design related contract documents</td>
</tr>
<tr>
<td>CTR Construction Approval</td>
<td>Kim Wilson - oversight of construction related contract documents</td>
</tr>
<tr>
<td>CTR Campus Services</td>
<td>TBD - oversight of campus services related contract documents</td>
</tr>
<tr>
<td>CTR Special Projects</td>
<td>Liz Punch - oversight of special projects related contract documents</td>
</tr>
<tr>
<td>CTR D&amp;C Director Approval</td>
<td>Scott Jones - oversight of all contract documents</td>
</tr>
<tr>
<td>CTR Financial Director Approval</td>
<td>David Goldfarb - oversight of all contract documents</td>
</tr>
<tr>
<td>CTR eSignature</td>
<td>Chuck Rhode - oversight of all contract documents</td>
</tr>
<tr>
<td>CTR Year End</td>
<td>Contracts that are not approved and put in a Year End queue for consideration with year end funds</td>
</tr>
<tr>
<td>CTR eSignature Declined</td>
<td>Scott Jones will manage this queue and consult with PMs on any contracts that are rejected by VP Facilities.</td>
</tr>
<tr>
<td>CTR Contract Officer &gt;200K Approval</td>
<td>Donna Vongsouvan contracting officer queue.</td>
</tr>
<tr>
<td>CTR Contract Office &lt; 200K Approval</td>
<td>Ericka Thomas contracting officer queue.</td>
</tr>
<tr>
<td>CTR Approval Complete</td>
<td>Contracts that are complete.</td>
</tr>
</tbody>
</table>
INVOICE ROUTING VIA IMAGENOW
2a) If invoice does not have contract number, or project number, it will be returned to the vendor and deleted from the queue. Standard email instructions on how to submit an invoice for payment is included when invoices are returned to the vendor.

\textbf{Note:} Invoices for Contracts with a “D” in the contract number are automatically routed to Ericka Thomas, without a “D” goes to Donna Vongsouvan
INVOICING FOR CONTRACTS

- **ALL** invoices for contracts should be emailed to gtfacinvoice@gatech.edu

- The AIM Project No. & Contract No. **must be** listed on the invoice
  - Example Contract No. (0351D-17 or 0257-17)
  - Example Project No. (0235-2017)

- Please include all close-out documents with final invoice (construction contracts ≥ $50K)

- The invoice **must be** stamped by the Project Manager in ImageNow

- GT payment terms are **30 days** from the date of invoice

**Note:** The invoice date **must be** after the date listed on the Notice to Proceed
INVOICE APPROVAL

The PM should do the following before approving an invoice for payment:

- Review data fields in ImageNow for accuracy
  - Project No.
  - Contract No.
  - Invoice Amount
  - Psoft Account No.
- If necessary, adjust dollar value
- Select “Yes” or “No” in the “Final Invoice?” field under “Custom Properties”
DELETING AN INVOICE FROM IMAGENOW

In order to delete an invoice from ImageNow:

- Enter “Delete” in the **Invoice No.** & **Contract No.** fields
- Add “sticky note” for detailed explanation
- Save changes
- Route invoice to “INV Return to Approval Start” queue
# INVOICE WORKFLOW QUEUE DECODER

<table>
<thead>
<tr>
<th>Name of Queue</th>
<th>Person Managing Queue / Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>INV Approval Start</td>
<td>Shauna York manages invoices coming into the system</td>
</tr>
<tr>
<td>INV Return to Approval Start</td>
<td>Shauna York manages invoices coming into the system</td>
</tr>
<tr>
<td>Purchase Order Invoices</td>
<td>Brenda Cochran manages purchase order invoices</td>
</tr>
<tr>
<td>INV Contracting Officer &gt; 200 K Approval</td>
<td>Donna Vongsouvan manages invoices against contracted amount</td>
</tr>
<tr>
<td>INV Contracting Officer &lt; 200 K Approval</td>
<td>Ericka Thomas manages invoices against contracted amount</td>
</tr>
<tr>
<td>INV Accounting Approval</td>
<td>Teresa McDonald prepares invoice to go to AP</td>
</tr>
<tr>
<td>INV PM Approval</td>
<td>Project Manager approval of invoice</td>
</tr>
<tr>
<td>INV Return to PM</td>
<td>Project Manager needs to respond to an issue on the invoice and route back to correct person in accounting.</td>
</tr>
<tr>
<td>INV Approval Complete</td>
<td>Invoices that are complete.</td>
</tr>
</tbody>
</table>
IMPORTANT WEB LINKS

- **VENDOR LOOKUP** - [https://webapps.gatech.edu/cfeis/vendor_info/vendor_lookup_form.cfm](https://webapps.gatech.edu/cfeis/vendor_info/vendor_lookup_form.cfm)

- **CONTRACTING FORMS/TEMPLATES** - [http://facilities.gatech.edu/](http://facilities.gatech.edu/)
  - Click “Administration” Tab
  - Select “Standard Forms & Templates”

- **STATE OF GEORGIA CONSTRUCTION MANUAL** -
THANK YOU!!!