



FACILITIES MANAGEMENT

Policy & Procedure #17

TITLE **FILING SYSTEM OF DOCUMENTATION FOR MAJOR BT PROJECTS (A/E & CM) WITHIN THE OFFICE OF ASSOCIATE VICE PRESIDENT FACILITIES MANAGEMENT**

OBJECTIVE AND PURPOSE Develop and maintain filing documentation for BT Projects (A/E & CM) from the executed Facilities Program through to the Contract within the AVP's office.

RESPONSIBILITY

ACTION

- ADMINISTRATIVE ASSISTANT**
- ◆ All original Facilities Programs are to be filed in the AVP's office:
 - ◆ The following documentation is to be filed in the *Selection File Folder* of each BT project file drawer in the AVP's office:
 - a. Electronic submission to Florida Administrative Weekly and a copy of the Advertisement and Project Fact Sheet.
 - b. Recent COIP showing release of funds
 - c. Approved Consultant's Checklist form
 - d. Public Notice showing time/date stamp that was sent to Purchasing for display
 - e. Door Sign showing time/date stamp of all RFP's on due date
 - f. PQS Irregularities and Schedule A-B-C forms
 - g. Memo to each Selection Committee Member advising of shortlist meeting date/time/location.
 - h. Memo to AVP advising of Committee's (3) recommendations
 - i. Certified letters to short listed firms once approval is received by the AVP
 - j. Regret letters to firms not selected
 - k. Reference Check on each short listed firm prior to interviews
 - l. Memo to each Selection Committee Member advising date/time/location for the interviews
 - m. Memo to AVP advising of Committee's selection of final firm
 - n. AVP and VP Financial Affairs' approval of final firm selected
 - o. Certified letter of award and regret letters

Issued By: Dashtaki	Date Issued: 9-30-2014	Date Revised:	Effective Date: 9-20-2014
APPROVED:	Vice Pres. Admin Affairs	Assistant V.P.	N/A Director

- ◆ The following documentation is to be filed in the **Contract File Folder** in the AVP's office:
 - a. Draft of A/E & CM Contracts along w/any comments from General Counsel
 - b. Original Contract w/cover letter to firm
 - c. Performance & Payment Bonds, Certificate of Insurance and Builder's Risk
 - d. Approval letter from University Risk Manager on insurance coverage.

- ◆ The following documents are to be filed in the **Proposals/Submittals Folder** in the AVP's office:
 - a. Original proposal and handouts from interview from the three (3) short listed firms

- ◆ Follow University archiving procedures for documents retained in the AVP's office.