

University of Houston Procurement Process for Construction Projects Costing \$10 Million or More and Construction Contracts Over \$1 Million

Construction and major renovation projects costing \$10 million or more must be approved by the UH System Board of Regents (BOR) and reviewed by the Texas Higher Education Coordinating Board (THECB) before a contract is signed. In addition, individual contracts within the project that will exceed \$1 million must be approved by the BOR before the contract is signed. The procurement process to select a vendor may occur before or after BOR approval and THECB review, but a contract cannot be signed until after BOR approval and THECB review are completed (BOR Policy 53.04). Any anticipated increase in the project budget by more than 10% or an increase in the contract amount by more than 25% that was previously approved by the BOR must be re-approved by the BOR before the project budget or contract amount is increased.

I. A&E Services for Construction Contract (Texas Government Code 2254)

1. Purchasing receives a Request for Qualification (RFQ) from Facilities Planning and Construction (FP&C) that has been approved by the Office of Contract Administration (OCA). (Note: OCA approved solicitation will have the letter "K" designation on the header.)
2. Purchasing asks the Project Manager if they are aware of any information that was shared with a potential respondent in the past year that might give the respondent a competitive advantage in responding to the solicitation. If the Project Manager is aware that such information was shared, Purchasing will include this information in the solicitation document so that all respondents will have access to the same information.
3. Purchasing completes a Subcontracting Probability Form to determine if a HSP will be required for the solicitation. The Form is signed by the responsible Buyer and a representative from HUB Operations and is saved in the Purchasing share drive folder for the solicitation.
4. Purchasing performs a review of RFQ, makes any revisions necessary, and assigns solicitation number for internal tracking purposes. Purchasing ensures the requirements of the solicitation are clearly stated in the solicitation document, such as the submission, content, and format of proposals, Execution of Offer, HSP, and/or other stated requirements of the solicitation.
5. Purchasing posts RFQ on ESBD for at least 21 calendar days.
6. Purchasing sends broadcast email notification to registered vendors on CMBL regarding public procurement opportunity to generate public interest.
7. Purchasing sends an electronic copy of solicitation and ESBD posting (screen-shot or website link) to Internal Audit, FP&C, and OCA after posting.
8. Purchasing prepares attendance sheet for pre-submittal meeting, leads meeting, and collects questions at the meeting. FP&C conducts site visits or tour of facilities as needed.
9. Purchasing communicates information to vendors, receives questions from vendors, coordinates with project team to address questions received, issues official addenda after questions deadline and prior to submittal due date.
10. Purchasing receives, opens, and reads aloud the name of the respondents. The responsible Buyer completes a Bid Opening Form, which lists the responses received and opened, and the time and date of the opening. The responsible Buyer signs and dates the Bid Opening

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Form and scans a copy into the Purchasing share drive folder for the solicitation. (The Bid Opening Form is used for responses to ITBs, RFPs, RFO, and RFQs.)

11. If a HSP was required by the solicitation, Purchasing prepares a HSP Compliance Review Form for each response to document whether the HSP was prepared in good faith. Respondents may be asked to clarify or correct information in the HSP or provide missing documentation. However, if the responsible Buyer and a HUB Operations representative agree that the HSP was not created in good faith, the HSP will be rejected and the respondent's response will be considered non-responsive. Both Purchasing and HUB Operations sign and date the HSP Compliance Review Form and scan a copy to the solicitation folder of the Purchasing share drive.
12. Purchasing prepares a Solicitation Requirements Checklist for the solicitation that includes all of the mandatory requirements (e.g., HSP, Execution of Offer, and any other stated requirements), a list of all respondents, and indicates whether each response complied with each of the requirements. The responsible Buyer will sign and date the Solicitation Requirements Checklist. Purchasing will consider all responses that are not in compliance with any of those requirements to be nonresponsive. The Purchasing Director (or higher authority) will also sign and date the Solicitation Requirements Checklist to verify they agree with the Buyer's decision. Purchasing will scan a copy of the Solicitation Requirements Checklist in the solicitation folder of the Purchasing share drive.
13. Purchasing emails Internal Audit a copy of the Subcontracting Probability Form, Bid Opening Form, HSP Compliance Review Forms, and the Solicitation Requirements Checklist for their review.
14. Purchasing requests FP&C to create a project folder on SharePoint and to grant SharePoint access to evaluation committee members. (Note: FP&C works with Vice Chancellor of Administration & Finance (A&F VC) to design a project-specific committee to evaluate responses.)
15. Purchasing uploads original solicitation, addenda, pre-qualified responses, evaluation matrix, and evaluation instruction sheet into SharePoint. Prior to uploading the evaluation matrix to SharePoint, another Purchasing staff member will review the formulas in the matrix for accuracy, in addition to the person in Purchasing who prepared the matrix. Both the preparer and reviewer will initial the matrix indicating their review.
16. Purchasing delivers one (1) set of original hard copies of responses to project manager and another set of originals are kept within Purchasing for open records requests and to comply with record retention procedures.
17. FP&C sends SharePoint logon instruction to committee members.
18. Purchasing sends committee instructions for completing the evaluation documents.
19. Purchasing requests clarification from respondents on their submittal if needed.
20. Purchasing collects and receives completed evaluations from committee on or before the specified evaluation due date.
21. Purchasing compiles individual committee evaluation score sheets and prepares evaluation summary. Another Purchasing staff member will review the calculation of all technical and non-technical scores and the combined committee evaluation scores for accuracy, in

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- addition to the person in Purchasing who prepared the evaluation summary. Both the preparer and reviewer will initial the evaluation summary to indicate their review.
22. Purchasing coordinates with project manager for shortlist interview recommendation.
 23. Purchasing sends final selection recommendation memo to Internal Audit for review and approval. Additional documents to include with the memo are the official solicitation, interview questionnaire, team evaluation summary after interview, and emails from the committee members with their scores attached.
 24. Shortlist recommendation memo is sent to A&F VC for review and approval. Additional documents to include with the memo are the official solicitation and team evaluation summary. Internal Audit is copied on this email.
 25. A&F VC copies Internal Audit on his reply to Purchasing regarding the shortlist recommendation.
 26. Purchasing sends shortlist notification emails to respondents for interview, and regret notifications to non-shortlist respondents after receiving approval from A&F VC.
 27. FP&C creates interview questionnaire, coordinates internal scheduling of committee members to attend shortlist interviews, and notifies Purchasing of available interview time, date, and location. If FP&C revises the evaluation criteria for shortlist interviews to be more project specific, Purchasing will notify the shortlisted vendors, evaluation committee, and Internal Audit in writing before the interviews begin.
 28. Purchasing releases interview schedule and questionnaire to shortlist respondents.
 29. Purchasing attends all shortlist interviews to ensure the integrity of the interview selection process (i.e., only committee members and one or more representatives from Purchasing will be allowed to attend the interviews).
 30. Purchasing receives completed evaluations from committee members after interviews and on or before the evaluation deadline.
 31. Purchasing compiles individual committee evaluation score sheets and prepares the interview evaluation summary. Another Purchasing staff member will review the calculation of all technical and non-technical scores and the combined committee evaluation scores for accuracy, in addition to the person in Purchasing who prepared the evaluation summary. Both the preparer and reviewer will initial the evaluation summary to indicate their review.
 32. Purchasing coordinates with project manager for final selection recommendation.
 33. Purchasing sends final selection recommendation memo to Internal Audit for review and approval. Additional documents to include with the memo are the official solicitation, interview questionnaire, team evaluation summary after interview, and emails from the committee members with their scores attached.
 34. Purchasing sends final selection recommendation memo to A&F VC for review and approval. Additional documents to include with the memo are the official solicitation, interview questionnaire, and team evaluation summary after interview. Internal Audit is copied on this email.
 35. A&F VC copies Internal Audit on his reply to Purchasing's final selection recommendation memo.
 36. Purchasing sends notification email to finalist for contract negotiation, and regret notifications to non-finalists after receiving approval from A&F VC.

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37. Purchasing prepares for open records requests, if any.

II. Two-Step CM@R Services (Texas Education Code Section 51.782)

Step 1 – RFQ

1. Purchasing receives Request for Qualification (RFQ) from Facilities Planning and Construction (FP&C) that has been approved by the Office of Contract Administration (OCA). (Note: OCA approved solicitation will have the letter “K” designation on the header.)
2. Purchasing asks the Project Manager if they are aware of any information that was shared with a potential respondent in the past year that might give the respondent a competitive advantage in responding to the solicitation. If the Project Manager is aware that such information was shared, Purchasing will include this information in the solicitation document so that all respondents will have access to the same information.
3. Purchasing completes a Subcontracting Probability Form to determine if a HSP will be required for the solicitation. The Form is signed by the responsible Buyer and a representative from HUB Operations and is saved in the Purchasing share drive folder for the solicitation.
4. Purchasing performs a review of the RFQ, makes any revisions necessary, and assigns a solicitation number for internal tracking purposes. Purchasing ensures the requirements of the solicitation are clearly stated in the solicitation document, such as the submission, content, and format of proposals, Execution of Offer, HSP, and/or other stated requirements of the solicitation.
5. Purchasing posts RFQ on ESD for at least 21 calendar days.
6. Purchasing sends broadcast email notification to registered vendors on CMBL regarding public procurement opportunity to generate public interest.
7. Purchasing sends an electronic copy of RFQ and ESD posting (screen-shot or website link) to Internal Audit, FP&C, and OCA after posting.
8. Purchasing prepares attendance sheet for pre-submittal meeting, leads meeting, and collects questions at the meeting. FP&C conducts site visits or tour of facilities as needed.
9. Purchasing communicates information to vendors, receives questions from vendors, coordinates with project team to address questions received, issues official addenda after questions deadline and prior to submittal due date.
10. Purchasing receives and opens responses and reads aloud each respondent’s name. The responsible Buyer completes a Bid Opening Form, which lists the responses received and opened, and the time and date of the opening. The responsible Buyer signs and dates the Bid Opening Form and scans a copy into the Purchasing share drive folder for the solicitation. (The Bid Opening Form is used for responses to ITBs, RFPs, RFO, and RFQs.)
11. If a HSP was required by the solicitation, Purchasing prepares a HSP Compliance Review Form for each response to document whether the HSP was prepared in good faith. Respondents may be asked to clarify or correct information in the HSP or provide missing documentation. However, if the responsible Buyer and a HUB Operations representative agree that the HSP was not created in good faith, the HSP will be rejected and the respondent’s response will be considered non-responsive. Both Purchasing and HUB

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Operations sign and date the HSP Compliance Review Form and scan a copy to the solicitation folder of the Purchasing share drive.

12. Purchasing prepares a Solicitation Requirements Checklist for the solicitation that includes all of the mandatory requirements (e.g., HSP, Execution of Offer, and any other stated requirements), a list of all respondents, and indicates whether each response complied with each of the requirements. The responsible Buyer will sign and date the Solicitation Requirements Checklist. Purchasing will consider all responses that are not in compliance with any of those requirements to be nonresponsive. The Purchasing Director (or higher authority) will also sign and date the Solicitation Requirements Checklist to verify they agree with the Buyer's decision. Purchasing will scan a copy of the Solicitation Requirements Checklist in the solicitation folder of the Purchasing share drive.
13. Purchasing emails Internal Audit a copy of the Subcontracting Probability Form, Bid Opening Form, HSP Compliance Review Forms, and the Solicitation Requirements Checklist for their review.
14. Purchasing requests FP&C to create a project folder on SharePoint and to grant SharePoint access to evaluation committee members. (Note: FP&C works with A&F VC to design a project-specific committee to evaluate responses.)
15. Purchasing uploads original solicitation, addenda, pre-qualified responses, evaluation matrix, and evaluation instruction sheet into SharePoint. Prior to uploading the evaluation matrix to SharePoint, another Purchasing staff member will review the formulas in the matrix for accuracy, in addition to the person in Purchasing who prepared the matrix. Both the preparer and reviewer will initial the matrix indicating their review.
16. Purchasing delivers one (1) set of original hard copies of responses to project manager and another set of originals are kept within Purchasing for open records requests and to comply with record retention procedures.
17. FP&C sends SharePoint logon instruction to committee members.
18. Purchasing sends committee instructions for completing the evaluation documents.
19. Purchasing requests clarification from respondents on their proposal if needed.
20. Purchasing receives completed evaluations from committee on or before the specified evaluation due date.
21. Purchasing compiles individual committee evaluation score sheets and prepares evaluation summary. Another Purchasing staff member will review the calculation of all technical and non-technical scores and the combined committee evaluation scores for accuracy, in addition to the person in Purchasing who prepared the evaluation summary. Both the preparer and reviewer will initial the evaluation summary to indicate their review.
22. Purchasing coordinates with project manager for shortlist (5 maximum) recommendation.
23. Purchasing sends recommendation memo for shortlist to Internal Audit for review and approval. Additional documents to include with the memo are the official solicitation, team evaluation summary, and emails from the committee members with their scores attached.
24. Shortlist recommendation memo is sent to A&F VC for review and approval. Additional documents to include with the memo are official solicitation and team evaluation summary. Internal Audit is copied on this email.

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25. A&F VC copies Internal Audit on his reply to Purchasing regarding the shortlist recommendation.
26. Purchasing sends shortlist notification emails to respondents for participation in second step of selection process, and regret notifications to non-shortlist respondents after receiving approval from A&F VC.

Step 2 - RFP

1. Purchasing receives a Request for Proposal (RFP) from FP&C that has been reviewed and approved by OCA.
2. Purchasing performs a review of the RFP, makes any revisions necessary, and assigns a solicitation number for internal tracking purposes. Purchasing ensures the requirements of the solicitation are clearly stated in the solicitation document, such as the submission, content, and format of proposals, Execution of Offer, HSP, and/or other stated requirements of the solicitation.
3. Purchasing posts RFP on ESD for at least 21 calendar days.
4. Purchasing sends an electronic copy of RFP and ESD posting (screen-shot or website link) to Internal Audit, FP&C, and OCA after posting.
5. Purchasing prepares attendance sheet for pre-submittal meeting, leads meeting, and collects questions at the meeting. FP&C conducts site visits or tour of facilities as needed.
6. Purchasing communicates information to vendors, receives questions from vendors, coordinates with project team to address questions received, and issues official addenda to ESD posting after questions deadline and prior to submittal due date.
7. Purchasing receives and opens RFP proposals. Purchasing reads aloud proposer name and price. The responsible Buyer completes a Bid Opening Form, which lists the responses received and opened, and the time and date of the opening. The responsible Buyer signs and dates the Bid Opening Form and scans a copy into the Purchasing share drive folder for the solicitation. (The Bid Opening Form is used for responses to ITBs, RFPs, RFO, and RFQs.)
8. If a HSP was required by the solicitation, Purchasing prepares a HSP Compliance Review Form for each response to document whether the HSP was prepared in good faith. Respondents may be asked to clarify or correct information in the HSP or provide missing documentation. However, if the responsible Buyer and a HUB Operations representative agree that the HSP was not created in good faith, the HSP will be rejected and the respondent's response will be considered non-responsive. Both Purchasing and HUB Operations sign and date the HSP Compliance Review Form and scan a copy to the solicitation folder of the Purchasing share drive.
9. Purchasing prepares a Solicitation Requirements Checklist for the solicitation that includes all of the mandatory requirements (e.g., HSP, Execution of Offer, and any other stated requirements), a list of all respondents, and indicates whether each response complied with each of the requirements. The responsible Buyer will sign and date the Solicitation Requirements Checklist. Purchasing will consider all responses that are not in compliance with any of those requirements to be nonresponsive. The Purchasing Director (or higher authority) will also sign and date the Solicitation Requirements Checklist to verify they agree

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with the Buyer's decision. Purchasing will scan a copy of the Solicitation Requirements Checklist in the solicitation folder of the Purchasing share drive.

10. Purchasing emails Internal Audit a copy of the Bid Opening Form, HSP Compliance Review Forms, and the Solicitation Requirements Checklist for their review.
11. Purchasing uploads original RFP solicitation, addenda, pre-qualified responses, evaluation matrix, and evaluation instruction sheet into SharePoint.
12. Purchasing delivers one (1) set of original hard copies of responses to project manager and another set of originals are kept within Purchasing for open records requests and to comply with record retention procedures.
13. Purchasing sends committee instructions for completing the evaluation documents. *Prior* to uploading the evaluation matrix to SharePoint, another Purchasing staff member will review the formulas in the matrix for accuracy, in addition to the person in Purchasing who prepared the matrix. Both the preparer and reviewer will initial the matrix indicating their review.
14. Purchasing prepares pricing calculation and applies standard pricing score for FP&C review and approval.
15. Purchasing requests clarification from respondents on their proposal if needed.
16. FP&C creates interview questionnaire, coordinates internal scheduling of committee members to attend shortlist interviews, and notifies Purchasing of available interview time, date, and location. If FP&C revises the evaluation criteria for shortlist interviews to be more project specific, Purchasing will notify the shortlisted vendors, evaluation committee, and Internal Audit in writing before the interviews begin.
17. Purchasing releases interview schedule and questionnaire to shortlist respondents.
18. Purchasing attends all shortlist interviews to ensure the integrity of the interview selection process (i.e., only committee members and one or more representatives from Purchasing will be allowed to attend the interviews).
19. Purchasing receives completed evaluations from committee members after interviews no later than the evaluation due date.
20. Purchasing compiles individual committee evaluation score sheets and prepares combined team summary. Another Purchasing staff member will review the calculation of all technical and non-technical scores and the combined committee evaluation scores for accuracy, in addition to the person in Purchasing who prepared the evaluation summary. Both the preparer and reviewer will initial the evaluation summary to indicate their review.
21. Purchasing coordinates with project manager for final selection recommendation.
22. Purchasing coordinates with project manager for final selection recommendation.
23. Purchasing sends final selection recommendation memo to Internal Audit for review and approval. Additional documents to include with the memo are the official solicitation, interview questionnaire, team evaluation summary after interview, and emails from the committee members with their scores attached.
24. Purchasing sends final selection recommendation memo to A&F VC for review and approval. Additional documents to include with the memo are official solicitation, interview questionnaire, and team evaluation summary. Internal Audit is copied on this email.

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25. A&F VC copies Internal Audit on his reply to Purchasing's final selection recommendation memo.
26. Purchasing sends notification email to finalist for contract negotiation, and regret notifications to non-finalists after receiving approval from A&F VC.
27. Purchasing prepares for open records requests, if any.

III. Two-Step Design-Build Services (Texas Education Code Section 51.780)

Step 1 - RFQ

1. Purchasing receives a RFQ from Facilities Planning and Construction (FP&C) that has been reviewed and approved by Office of General Counsel (OCA). (Note: OCA approved solicitation will have the letter "K" designation on the header.)
2. Purchasing asks the Project Manager if they are aware of any information that was shared with a potential respondent in the past year that might give the respondent a competitive advantage in responding to the solicitation. If the Project Manager is aware that such information was shared, Purchasing will include this information in the solicitation document so that all respondents will have access to the same information.
3. Purchasing completes a Subcontracting Probability Form to determine if a HSP will be required for the solicitation. The Form is signed by the responsible Buyer and a representative from HUB Operations and is saved in the Purchasing share drive folder for the solicitation.
4. Purchasing performs a review of the RFQ, makes any revisions necessary, and assigns a solicitation number for internal tracking purposes. Purchasing ensures the requirements of the solicitation are clearly stated in the solicitation document, such as the submission, content, and format of proposals, Execution of Offer, HSP, and/or other stated requirements of the solicitation.
5. Purchasing posts RFQ on ESBD for at least 21 calendar days.
6. Purchasing sends broadcast email notification to registered vendors on CMBL regarding public procurement opportunity to generate public interest.
7. Purchasing sends an electronic copy of RFQ and ESBD posting (screen-shot or website link) to Internal Audit, FP&C, and OCA after posting.
8. Purchasing prepares attendance sheet for pre-submittal meeting, leads meeting, and collects questions at the meeting. FP&C conducts site visits or tour of facilities as needed.
9. Purchasing communicates information to vendors, receives questions from vendors, coordinates with project team to address questions received, issues official addenda after questions deadline and prior to submittal due date.
12. Purchasing receives and opens responses and reads aloud each respondent's name. The responsible Buyer completes a Bid Opening Form, which lists the responses received and opened, and the time and date of the opening. The responsible Buyer signs and dates the Bid Opening Form and scans a copy into the Purchasing share drive folder for the solicitation. (The Bid Opening Form is used for responses to ITBs, RFPs, RFO, and RFQs.)
13. If a HSP was required by the solicitation, Purchasing prepares a HSP Compliance Review Form for each response to document whether the HSP was prepared in good faith.

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Respondents may be asked to clarify or correct information in the HSP or provide missing documentation. However, if the responsible Buyer and a HUB Operations representative agree that the HSP was not created in good faith, the HSP will be rejected and the respondent's response will be considered non-responsive. Both Purchasing and HUB Operations sign and date the HSP Compliance Review Form and scan a copy to the solicitation folder of the Purchasing share drive.

14. Purchasing prepares a Solicitation Requirements Checklist for the solicitation that includes all of the mandatory requirements (e.g., HSP, Execution of Offer, and any other stated requirements), a list of all respondents, and indicates whether each response complied with each of the requirements. The responsible Buyer will sign and date the Solicitation Requirements Checklist. Purchasing will consider all responses that are not in compliance with any of those requirements to be nonresponsive. The Purchasing Director (or higher authority) will also sign and date the Solicitation Requirements Checklist to verify they agree with the Buyer's decision. Purchasing will scan a copy of the Solicitation Requirements Checklist in the solicitation folder of the Purchasing share drive.
15. Purchasing emails Internal Audit a copy of the Subcontracting Probability Form, Bid Opening Form, HSP Compliance Review Forms, and the Solicitation Requirements Checklist for their review.
16. Purchasing requests FP&C to create a project folder on SharePoint and to grant SharePoint access to evaluation committee members. (Note: FP&C works with A&F VC to design a project-specific committee to evaluate responses.)
17. Purchasing uploads original solicitation, addenda, pre-qualified responses, evaluation matrix, and evaluation instruction sheet into SharePoint. Prior to uploading the evaluation matrix to SharePoint, another Purchasing staff member will review the formulas in the matrix for accuracy, in addition to the person in Purchasing who prepared the matrix. Both the preparer and reviewer will initial the matrix indicating their review.
18. Purchasing delivers one (1) set of original hard copies of responses to project manager and another set of originals are kept within Purchasing for open records requests and to comply with record retention procedures.
19. FP&C sends SharePoint logon instruction to committee members.
20. Purchasing sends committee instructions for completing the evaluation documents.
21. Purchasing requests clarification from respondents on their proposal if needed.
22. Purchasing receives completed evaluations from committee on or before the specified evaluation due date.
23. Purchasing compiles individual committee evaluation score sheets and prepares evaluation summary. Another Purchasing staff member will review the calculation of all technical and non-technical scores and the combined committee evaluation scores for accuracy, in addition to the person in Purchasing who prepared the evaluation summary. Both the preparer and reviewer will initial the evaluation summary to indicate their review.
24. Purchasing coordinates with project manager for recommended shortlist (5 maximum) to move forward to second step of selection process.

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25. Purchasing sends recommendation memo for shortlist to Internal Audit for review and approval. Additional documents to include with the memo are the official solicitation, team evaluation summary, and emails from the committee members with their scores attached.
26. Shortlist recommendation memo is sent to A&F VC for review and approval. Additional documents to include with the memo are official solicitation and team evaluation summary. Internal Audit is copied on this email.
27. A&F VC copies Internal Audit on his reply to Purchasing regarding the shortlist recommendation.
28. Purchasing sends shortlist notification emails to respondents for participation in second step of selection process, and regret notifications to non-shortlist respondents after receiving approval from A&F VC.

Step 2 - RFP

1. Purchasing receives a RFP from FP&C that has been approved by OCA.
2. Purchasing performs a review of the RFP, makes any revisions necessary, and assigns a solicitation number for internal tracking purposes. Purchasing ensures the requirements of the solicitation are clearly stated in the solicitation document, such as the submission, content, and format of proposals, Execution of Offer, HSP, and/or other stated requirements of the solicitation.
3. Purchasing posts RFP on ESBD for at least 21 calendar days.
4. Purchasing sends an electronic copy of RFP and ESBD posting (screen-shot or website link) to Internal Audit, FP&C, and OCA after posting.
5. Purchasing prepares attendance sheet for pre-submittal meeting, leads meeting, and collects questions at the meeting. FP&C conducts site visits or tour of facilities as needed.
6. Purchasing communicates information to vendors, receives questions from vendors, coordinates with project team to address questions received, and issues official addenda to ESBD posting after questions deadline and prior to submittal due date.
7. Purchasing receives and opens RFP proposals. Purchasing reads aloud proposer name and price. The responsible Buyer completes a Bid Opening Form, which lists the responses received and opened, and the time and date of the opening. The responsible Buyer signs and dates the Bid Opening Form and scans a copy into the Purchasing share drive folder for the solicitation. (The Bid Opening Form is used for responses to ITBs, RFPs, RFO, and RFQs.)
8. If a HSP was required by the solicitation, Purchasing prepares a HSP Compliance Review Form for each response to document whether the HSP was prepared in good faith. Respondents may be asked to clarify or correct information in the HSP or provide missing documentation. However, if the responsible Buyer and a HUB Operations representative agree that the HSP was not created in good faith, the HSP will be rejected and the respondent's response will be considered non-responsive. Both Purchasing and HUB Operations sign and date the HSP Compliance Review Form and scan a copy to the solicitation folder of the Purchasing share drive.
9. Purchasing prepares a Solicitation Requirements Checklist for the solicitation that includes all of the mandatory requirements (e.g., HSP, Execution of Offer, and any other stated

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requirements), a list of all respondents, and indicates whether each response complied with each of the requirements. The responsible Buyer will sign and date the Solicitation Requirements Checklist. Purchasing will consider all responses that are not in compliance with any of those requirements to be nonresponsive. The Purchasing Director (or higher authority) will also sign and date the Solicitation Requirements Checklist to verify they agree with the Buyer's decision. Purchasing will scan a copy of the Solicitation Requirements Checklist in the solicitation folder of the Purchasing share drive.

10. Purchasing emails Internal Audit a copy of the Bid Opening Form, HSP Compliance Review Forms, and the Solicitation Requirements Checklist for their review.
11. Purchasing uploads original RFP solicitation, addenda, pre-qualified responses, evaluation matrix, and evaluation instruction sheet into SharePoint.
12. Purchasing delivers one (1) set of original hard copies of responses to project manager and another set of originals are kept within Purchasing for open records requests and to comply with record retention procedures.
13. Purchasing sends committee instructions for completing the evaluation documents. Prior to uploading the evaluation matrix to SharePoint, another Purchasing staff member will review the formulas in the matrix for accuracy, in addition to the person in Purchasing who prepared the matrix. Both the preparer and reviewer will initial the matrix indicating their review.
14. Purchasing prepares pricing calculation and applies standard pricing score for FP&C review and approval.
15. Purchasing requests clarification from respondents on their proposal if needed.
16. FP&C creates interview questionnaire, coordinates internal scheduling of committee members to attend shortlist interviews, and notifies Purchasing of available interview time, date, and location. If FP&C revises the evaluation criteria for shortlist interviews to be more project specific, Purchasing will notify the shortlisted vendors, evaluation committee, and Internal Audit in writing before the interviews begin.
17. Purchasing releases interview schedule and questionnaire to shortlist respondents.
18. Purchasing attends all shortlist interviews to ensure the integrity of the interview selection process (i.e., only committee members and one or more representatives from Purchasing will be allowed to attend the interviews).
19. Purchasing receives completed evaluations from committee members after interviews no later than the evaluation due date.
20. Purchasing compiles individual committee evaluation score sheets and prepares combined team summary. Another Purchasing staff member will review the calculation of all technical and non-technical scores and the combined committee evaluation scores for accuracy, in addition to the person in Purchasing who prepared the evaluation summary. Both the preparer and reviewer will initial the evaluation summary to indicate their review. Purchasing coordinates with project manager for final selection recommendation.
21. Purchasing sends final selection recommendation memo to Internal Audit for review and approval. Additional documents to include with the memo are the official solicitation, interview questionnaire, team evaluation summary after interview, and emails from the committee members with their scores attached.

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22. Purchasing sends final selection recommendation memo to A&F VC for review and approval. Additional documents to include with the memo are official solicitation, interview questionnaire, and team evaluation summary. Internal Audit is copied on this email.
23. A&F VC copies Internal Audit on his reply to Purchasing's final selection recommendation memo.
24. Purchasing sends notification email to finalist for contract negotiation, and regret notifications to non-finalists after receiving approval from A&F VC.
25. Purchasing prepares for open records requests, if any.

IV. One-Step CM@R Services (Texas Education Code Section 51.782)

1. Purchasing receives a RFP from FP&C that has been approved by OCA.
2. Purchasing asks the Project Manager if they are aware of any information that was shared with a potential respondent in the past year that might give the respondent a competitive advantage in responding to the solicitation. If the Project Manager is aware that such information was shared, Purchasing will include this information in the solicitation document so that all respondents will have access to the same information.
3. Purchasing completes a Subcontracting Probability Form to determine if a HSP will be required for the solicitation. The Form is signed by the responsible Buyer and a representative from HUB Operations and is saved in the Purchasing share drive folder for the solicitation.
4. Purchasing performs a review of the RFP, makes any revisions necessary, and assigns a solicitation number for internal tracking purposes. Purchasing ensures the requirements of the solicitation are clearly stated in the solicitation document, such as the submission, content, and format of proposals, Execution of Offer, HSP, and/or other stated requirements of the solicitation.
5. Purchasing posts RFP on ESDB for at least 21 calendar days.
6. Purchasing sends an electronic copy of RFP and ESDB posting (screen-shot or website link) to Internal Audit, FP&C, and OCA after posting.
7. Purchasing prepares attendance sheet for pre-submittal meeting, leads meeting, and collects questions at the meeting. FP&C conducts site visits or tour of facilities as needed.
8. Purchasing communicates information to vendors, receives questions from vendors, coordinates with project team to address questions received, and issues official addenda to ESDB posting after questions deadline and prior to submittal due date.
10. Purchasing receives and opens RFP proposals. Purchasing reads aloud proposer name and price. The responsible Buyer completes a Bid Opening Form, which lists the responses received and opened, and the time and date of the opening. The responsible Buyer signs and dates the Bid Opening Form and scans a copy into the Purchasing share drive folder for the solicitation. (The Bid Opening Form is used for responses to ITBs, RFPs, RFO, and RFQs.)
11. If a HSP was required by the solicitation, Purchasing prepares a HSP Compliance Review Form for each response to document whether the HSP was prepared in good faith. Respondents may be asked to clarify or correct information in the HSP or provide missing

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documentation. However, if the responsible Buyer and a HUB Operations representative agree that the HSP was not created in good faith, the HSP will be rejected and the respondent's response will be considered non-responsive. Both Purchasing and HUB Operations sign and date the HSP Compliance Review Form and scan a copy to the solicitation folder of the Purchasing share drive.

12. Purchasing prepares a Solicitation Requirements Checklist for the solicitation that includes all of the mandatory requirements (e.g., HSP, Execution of Offer, and any other stated requirements), a list of all respondents, and indicates whether each response complied with each of the requirements. The responsible Buyer will sign and date the Solicitation Requirements Checklist. Purchasing will consider all responses that are not in compliance with any of those requirements to be nonresponsive. The Purchasing Director (or higher authority) will also sign and date the Solicitation Requirements Checklist to verify they agree with the Buyer's decision. Purchasing will scan a copy of the Solicitation Requirements Checklist in the solicitation folder of the Purchasing share drive.
13. Purchasing emails Internal Audit a copy of the Subcontracting Probability Form, Bid Opening Form, HSP Compliance Review Forms, and the Solicitation Requirements Checklist for their review.
14. Purchasing uploads original RFP solicitation, addenda, pre-qualified responses, evaluation matrix, and evaluation instruction sheet into SharePoint.
15. Purchasing delivers one (1) set of original hard copies of responses to project manager and another set of originals are kept within Purchasing for open records requests and to comply with record retention procedures.
16. Purchasing sends committee instructions for completing the evaluation documents. Prior to uploading the evaluation matrix to SharePoint, another Purchasing staff member will review the formulas in the matrix for accuracy, in addition to the person in Purchasing who prepared the matrix. Both the preparer and reviewer will initial the matrix indicating their review.
17. Purchasing prepares pricing calculation and applies standard pricing score for FP&C review and approval.
18. Purchasing requests clarification from respondents on their proposal if needed.
19. FP&C creates interview questionnaire, coordinates internal scheduling of committee members to attend shortlist interviews, and notifies Purchasing of available interview time, date, and location. If FP&C revises the evaluation criteria for shortlist interviews to be more project specific, Purchasing will notify the shortlisted vendors, evaluation committee, and Internal Audit in writing before the interviews begin.
20. Purchasing releases interview schedule and questionnaire to shortlist respondents.
21. Purchasing attends all shortlist interviews to ensure the integrity of the interview selection process (i.e., only committee members and one or more representatives from Purchasing will be allowed to attend the interviews).
22. Purchasing receives completed evaluations from committee members after interviews no later than the evaluation due date.
23. Purchasing compiles individual committee evaluation score sheets and prepares combined team summary. Another Purchasing staff member will review the calculation of all technical

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and non-technical scores and the combined committee evaluation scores for accuracy, in addition to the person in Purchasing who prepared the evaluation summary. Both the preparer and reviewer will initial the evaluation summary to indicate their review.

24. Purchasing coordinates with project manager for final selection recommendation.
25. Purchasing sends final selection recommendation memo to Internal Audit for review and approval. Additional documents to include with the memo are the official solicitation, interview questionnaire, team evaluation summary after interview, and emails from the committee members with their scores attached.
26. Purchasing sends final selection recommendation memo to A&F VC for review and approval. Additional documents to include with the memo are official solicitation, interview questionnaire, and team evaluation summary. Internal Audit is copied on this email.
27. A&F VC copies Internal Audit on his reply to Purchasing's final selection recommendation memo.
28. Purchasing sends notification email to finalist for contract negotiation, and regret notifications to non-finalists after receiving approval from A&F VC.
29. Purchasing prepares for open records requests, if any.