CAP Large Projects Low Bid Process Map

OKLAHOMA Office of Management & Enterprise Services

Using Agency	Project Manager	Consultant	Contract Coordinator

START

1. Submits the M701, specifications, scope, drawings and approvals to CAP@omes.ok.gov.

2. Conducts a preliminary evaluation of scope and specifications.

3. Contacts the using agency or consultant for confirmation of the project, including approval from the authority holding jurisdiction.

4. Prepares for the pre-bid meeting and uses the CAP DIV I template that was included in the specifications.

5. Prepares the project manual and verifies the CAP cover sheet is correct and signed by the CAP director.

6. Schedules the bid opening date and pre-bid meeting for all parties.

7. Sends the CAP email announcing the project is ready for bid and populates the upload folder with all required documents.

8. Submits to Bid Express and sends for an advertisement.

9. Conducts the pre-bid meeting and invites the consultant and using agency.

10. Issues project addenda as needed.

11. Once bids are submitted, generates a bid tally sheet and sends it to the PM.

12. Reviews the bid tally sheet and sends it to the using agency and consultant.

13. Sends a recommendation letter on the lowest responsible bidder to the using agency and PM.

14. Sends a request to award the bid to the PM within 7 to 10 business days.

15. Awards the bid within 30 days of bid submission, generates the contract and sends the contract to the bidder while copying the UA and consultant.

16. Ensures all bonds, sureties and insurance are in place.

17. Sends the contract to the UA for signature.

18. Generates a purchase order and sends it to the PM.

19. Sends the purchase order to the CAP director for approval.

20. Completes the NTP and sends it to the vendor with the PO. Also creates the CAP fee invoice and sends to the UA.

21. Schedules and conducts the pre-construction meeting.

22. Confirms all required documents and approvals and reviews the schedule of values before submitting it to the using agency.

23. Reviews any RFTs and change orders and submits the change orders to the CAM administrator for approval.

24. Sends executed copies of contracts and change orders to the contractor, using agency and consultant.

25. Saves all documents and correspondence in Unifier and the I:Drive folder as a backup.

PROJECT EXECUTION PHASE

26. Schedules a substantial completion site visit and creates a punch list with the consultant.

27. Reviews the punch list with the using agency.

28. Guides the project to completion.

29. Works together to compile the close out documents.

30. Submits the consultant invoice.

31. Performs the vendor evaluation.

32. Schedules a post-occupancy evaluation/warranty.

33. Creates a reconciled CAP fee invoice, if necessary.

END