Construction Agreement 1

**Contract Officer**
1) Receives instructions to pursue award
2) Creates Contract Package
   - cover letter
   - General Instructions
   - 2 of Insurance Requirements
   - W-9 and ACH Forms (4 Pages)
   - Agreement Form
   - 5 of SBC-1
   - 2 letter to F&A-B&F
3) Enters data in PITS
4) Files 1 counter part of package

**Awardee**
1) Receives Agreement package
   - cover letter
   - 1 of general instructions
   - 1 of Agreement form
   - 1 of each bond form
   - 1 of insurance summary
   - 1 of W-9 and ACH forms
2) Completes & returns counterparts
   - 2 of Agreement form
   - 2 of each bond
   - 2 of each insurance certificate
   - 1 or more of W-9 & ACH

**Contract Officer**
1) Enters data in PITS
2) Checks Agreement, insurance, bonds
3) Resolves Awardee’s deficiencies
4) Completes routing check list
5) Initials Routing memo from file
6) Enters data in PITS(bid tracking and contractor setup)
7) Forwards Agreement package to Executive Director
8) Prints SBC-7 from PITS and forwards to Project Manager

**OFD Executive Director**
1) Reviews for compliance w/statutes, policies, and contracting procedures
2) Initials routing memo and forwards

**OFD Executive Director**
3) Receives original SBC-1 and copy of Bid Tab for approval

**Designer**
Receives copy of cover letter

**Office of Business and Finance**
1) Verifies Funds
2) Issues Purchase Order
3) Obtains OBF Vice Chancellor signature
4) Initials routing memo & forwards

**OFD Project Manager**
Receives & processes SBC-7

Cont...
Construction Agreement 2

**General Counsel Office**
1) Reviews for form and legality
2) Obtains chief counsel signature
3) Initials routing memo & forwards

**Chancellor**
1) Reviews documents
2) Obtain Chancellor’s signature
3) Initials routing memo & forwards

**Contract Officer**
1) Inserts appropriate dates on Agreement and bonds
2) Enters data in PITS
3) Copies Agreement & attachments and forwards with Designer and Contractor counterparts to OFD Construction Services
4) Routes OFD and OBF counterparts to OFD support
5) Uploads job files in the system and up-dates PITS Construction Contract Screen
6) Creates award letter
7) Issues award letter w/counterparts to Contractor and Designer
8) E-mails notification to Contractor and Designer

Transmittal may occur in
**Pre-Construction Conference** as befits needs of project.

**Designer receives**
1) Copy of Award letter
2) counterpart of:
   - Agreement
   - Bonds
   - Insurance Certificates

**Contractor receives**
1) Award letter
2) counterpart of:
   - Agreement
   - Bonds
   - Insurance Certificates