

UNIVERSITY OF **HOUSTON** PLANT OPERATIONS

CONTINUING SERVICES
and
JOB ORDERS

May 22, 2012





Agenda

- **Overview / Objective**
- **Process for Awarding Projects Under Continuing Services**
 - **Request for Services**
 - **Post –Evaluation**
- **Break**
- **Process for Awarding Job Order Projects**
 - **Request for Services**
 - **Post –Evaluation**
- **Reporting**
- **Questions / Answers**

Overview

- **Historical Perspective**
 - Past Audits
 - Issues and Concerns

- **Objective:**
 - **Understand process to award projects under:**
 - Continuing Services
 - Job Orders



Differences & Similarities:

Continuing Services		Job Orders
Continuing Service Agreements and Service Orders		Owner-Contractor Agreements by Project Job Orders
Up to \$900k aggregate annually		Up to \$100K direct cost

SIMILARITIES

- Selection and Award Process
- Proceed to Negotiate / Secure Contract
 - Reporting
 - PM Evaluations



Roles and Responsibilities

- **Continuing Service Representatives:**
 - Katherine Miller (Continuing Services Agreement)
 - James G. Norcom, III
 - Mike Yancey
- **Job Order Representative:**
 - James G. Norcom, III
- **Process Advising and Reporting** – George Rea
- **Executive Leadership** – Melissa Rockwell-Hopkins and Jonathan Thurston



Continuing Services

- To establish a standardized process for the assignment of major and minor design projects for the construction, repairs and rehabilitation of a facility to vendors and firms (Service Provider) that have executed Continuing Services Agreements (CSA) with the University of Houston (the University). It is the responsibility of the employee to become familiar with the CSA. Any capitalized terms not specifically defined in this document shall have the meaning assigned them in the CSA.



Continuing Services Categories

Architectural Services

Air Testing and Balancing Services

Commissioning Services

Project Management

Land Survey Services

Civil and Structural Services

Mechanical, Electrical & Plumbing Engineering (MEP)

Asbestos Consulting Services

Mold Professional Services

Environmental Services

Geotechnical Services

Construction Material Testing



Request for Continuing Services

NEXT STEPS:

- PM Proceed to Negotiate / Quote
- Cover Memo, Request Form, & Summary
- Close-out – PM Evaluation

Request for Continuing Services

ATTACHMENT A

UNIVERSITY OF HOUSTON
Plant Operations
REQUEST FOR CONTINUING SERVICES FORM

DATE: <Date of Request>
 REQUESTOR: <Project Manager>
 CONTACT INFORMATION: <Name@central.uh.edu> <713-743-8888>
 CONTINUING SERVICE REQUESTED: <Service Type>
 SERVICE REPRESENTATIVE: <Name of Representative>

Project Name:	<Project Name>	Project NO.:	<PJ#>	Contract Amount:	<\$\$\$>	CONTRACT ADMINISTRATION			
<Insert Scope/Narrative, Project Description>						Dollar Amount of Awards	Number of Jobs / Projects	Past Performance Rating	
PROJECT MANAGER'S RECOMMENDATION AND JUSTIFICATION									
<Insert Justification for Recommendation>									
Company A					\$ -	0	0		
Company B					\$ -	0	0		
Company C					\$ -	0	0		
Company D					\$ -	0	0		
Company E					\$ -	0	0		
Company F					\$ -	0	0		
Accept or Reject	<REJECT, Insert new RECOMMENDATION AND JUSTIFICATION>								
Director/PPM									
Accept or Reject	< REJECT, Insert new RECOMMENDATION AND JUSTIFICATION>								
Executive Director									
1st Recommendation	Company Name / Service Provider								
2nd Recommendation	Company Name / Service Provider								

Continuing Service Evaluation

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Continuing Services Evaluation

Project No. _____ Project Name: _____
 Firm Name-Architecture: _____ Contact Name: _____
 Firm Name-Engineering: _____ Contact Name: _____
 Firm Name-(Other): _____ Contact Name: _____
 Service(s) Rated: Architecture Engineering Other _____
 (check all that apply)
 Phase Project Service(s) Rated Pre-Construction (planning, design & bidding) Construction (construction & closeout)

Please rate the effectiveness of the professional service firms' performances on the capital improvement project across the following dimensions:

Evaluation Criteria: 0 = N/A 1 = Low 5 = Moderate 10 = High

Performance Dimensions:		Value	Arch. Score	Eng. Score	(Other) Score
1) Expertise, knowledge and experience	Fulfilled commitment to maintaining proposed Team for duration of project (including EDGE).	0-10			
2) Problem solving and decision making	Provided effective and creative problem solving and fair decision making.	0-10			
3) Timeliness and responsiveness	Performed responsibilities and provided feedback to inquiries in a timely manner.	0-10			
4) Process facilitation, communication and partnering	Effective project documentation and communication.	0-10			
5) Scope management	Identified, tracked and managed changes within project.	0-10			
6) Schedule management	Effectively managed project schedule and completed deliverables on time.	0-10			
7) Budget management	Provided valuable input and leadership to manage project on budget.	0-10			
8) Quality management	Ensured quality design/construction and deliverables.	0-10			
9) Risk management	Provided thorough guidance and effective action in managing/balancing project risks.	0-10			
10) Overall project management	Delivered effective overall project management.	0-10			
Total					

Would you recommend the professional service firm/team for comparable work in the future?

Architect: Yes No Engineer: Yes No (Other) Yes No

Please provide any comments regarding the professional service firms:

Evaluator's Name: _____ Telephone Number: () - _____
 Stakeholder Group: FM FPC Other

If mailing completed evaluation, please forward to:
 University of Houston, Plant Operations – Contracts Administration, 4211 Elgin Street, Houston, Texas 77204

Continuing Services

Question / Answer



Let's take a 5 – 10 Break!



Job Order Services

- To establish a standardized process for the assignment of construction contracting services to JOC Contractors who have executed Owner-Contractor Agreements by Project Job Orders (JOCs) with the University of Houston (the University). It is the responsibility of the employee to become familiar with the JOC form. Any capitalized terms not specifically defined in this document shall have the meaning assigned them in the JOC.

Why JOC ?



Job Order Terms & Categories

CONTRACT TERMS

The individual JOC Project value cannot exceed
(a) \$100,000 in construction cost

- **General Contractors (5)**
 - 2-Year, with two 1-year renewals
- **Asbestos and Mold Remediation**
 - 2-Year, with two 1-year renewals
- **Flooring**
 - 2-Year, with two 1-year renewals





Request for Job Order Requests

NEXT STEPS:

- PM Proceed to Negotiate / Quote
- Cover Memo, Request Form, & Summary
- Close-out – PM Evaluation

Sample JOC request form

<Insert Scope/Narrative, Project Description>		Dollar Amount of Awards	Number of Jobs / Projects	Past Performance Rating(s)
PROJECT MANAGER - RECOMMENDATION AND JUSTIFICATION				
<Insert Justification for Recommendation>				
General Contractor I VAUGHN CONSTRUCTION	Special emphasis in RESEARCH, LABORATORIES, AND GENERAL CONSTRUCTION.	\$ -	0	0.00
General Contractor II HORIZON GROUP INTERNATIONAL	Special emphasis in GENERAL CONSTRUCTION.	\$ -	0	0.00
General Contractor III CENTENNIAL CONTRACTORS	Centennial Contractors Enterprises, Inc. (Centennial) provides responsive contracting services that support large facilities and infrastructures by managing construction projects focused on renovation, rehabilitation, and repair work. In addition to being a pioneer and expert in Job Order Contracting (JOC) programs, Centennial provides solutions that are integrated with the customer's needs, budgets and operations.	\$ -	0	0.00
General Contractor IV TREVINO GROUP	Special emphasis in GENERAL CONSTRUCTION.	\$ -	0	0.00
General Contractor V P2MG	an 8A certified firm of experienced architects, engineers, project, and construction managers has successfully completed over \$450 million dollars of K-12, higher education, city, county, state and federal government construction and design projects.	\$ -	4	0.00
Accept or Reject Director/PPM	<REJECT, insert new RECOMMENDATION AND JUSTIFICATION>.			
Accept or Reject Executive Director	< REJECT, insert new RECOMMENDATION AND JUSTIFICATION>.			
1st Recommendation	Company Name / JOC Name			
2nd Recommendation (General Contractor ONLY)	Company Name / JOC Name			

Evaluate

MPP-PM



Job Order Contractor Evaluation

Company Name: _____ Project Contact Name _____

Date _____ Project No. _____ Project Name _____

Trade Performed: General Environmental Flooring
(check all that apply)

Contract Type: Job Order Contractor Subcontractor Other
(check all that apply)

Please rate the effectiveness of the Contractor's performance on the capital improvement project across the following dimensions:

Evaluation Criteria: 0 = N/A 1 = Low 5 = Moderate 10 = High

Performance Dimensions:		Value	Score
1) Expertise, knowledge and experience	Dedicated experienced people for duration of project & maintained EDGE commitment.	0-10	
2) Problem solving and decision making	Provided effective & creative problem solving, coordination & fair decision making on project.	0-10	
3) Timeliness and responsiveness	Performed responsibilities, coordination & provided information/documentation in a timely manner.	0-10	
4) Process facilitation, communication and partnering	Effective project documentation & communication in facilitating a successful project.	0-10	
5) Scope management	Identified issues & effectively managed changes within project.	0-10	
6) Schedule management	Effectively managed/coordinated project schedule to complete milestones and project on time.	0-10	
7) Budget management	Offered valuable input to owners for managing project on budget.	0-10	
8) Quality management	Performed quality construction in a safe manner through demonstrated QA/QC processes.	0-10	
9) Risk management	Provided prompt notification and effective action in managing/balancing project risks.	0-10	
10) Overall project management	Delivered effective overall project management for owners.	0-10	
Total		0-100	

Based on these comments, would you recommend this Contractor for comparable work in the future?

Yes No

Please provide any comments regarding the Contractor's performance or the quality of its work.

Comments:

Evaluator's Name: _____ Telephone Number: () -

Stakeholder's Group: FM FPC Other

If mailing completed evaluation, please forward to:
University of Houston, Plant Operations-Contracts Administration, 4211 Elgin, Houston, Texas 77204



Expertise
Problem solving
Timeliness
Communication
Scope
Schedule
Budget
Quality
Risk
Overall



Reporting:

- **Project Managers/Evaluators:**
 - Post-Evaluation for services performed by Service Provider or JOC.

- **Contract Administration:**
 - Monthly & Quarterly activity reports

- **Executive Leadership:**
 - Quarterly review to ensure Service Providers and JOC's continues to provide the 'best value' to the University.
 - Bi-Annual review to assess compliance to program guidelines and to evaluate the effectiveness of the program.

Questions / Answers



FINISH LINE – THE END!



HANDOUTS & Other

1. Business Process for Awarding Projects Under Continuing Services
 - Request for Continuing Services Form
 - Continuing Services Evaluation Form

2. Business Process for Job Order Projects
 - Request for Job Order Form
 - Job Order Evaluation Form

3. Continuing Services and Job Order
 - Contact List

- **Plant Ops Web Link:**
 - <http://www.uh.edu/plantops/projdel/>