

The Hard Bid Process & Timeline

(High Level Overview)

1. Initial Planning

Client submits initial work order request to Capital Programs

Project Manager meets with the client within 10 business days to discuss the project, conduct a preliminary assessment, and estimate costs

Client decides whether or not to proceed. If client proceeds, client agrees to pay for Project Start Up phase. If client decides not to proceed, no costs are incurred.

2. Project Startup

Client reviews process of the project with milestone deliveries & timeline

Conditions of Satisfaction are discussed between the client and the Project Manager

A mutual understanding of the project is agreed to using the Project Impact Assessment Checklist

Confirm estimated project costs

Client decides whether or not to proceed.

**The Project Impact Assessment Checklist will be referred to and used throughout the project*

3. Funding Request and Bid

Client provides funding*.

Capital Programs goes through advertising, bidding, and awarding work

The Project Manager will notify all relevant parties once a contract has been executed

**Funding may be provided up front or in incremental amounts, depending on the project.*

4. Design Professional Selection & Programming

Based on the nature of the project, a Design Professional is selected based on qualifications and client requirements.

Check and adjust funding request based on design

Facilities & Capital Programs review any known or triggered deficiencies (e.g. code, capacity, or fire and life safety)

Design Professional leads the programming effort to determine and document specific customer and UCSF performance requirements in detail.

Client provides input on equipment relocation (as needed)

5. Bidding & Construction

A Construction kick off meeting occurs

Construction occurs with regular meetings and open communication with client

6. Turn space over to client

Turn the project (and space) over to the client

7. Project Closeout

Closeout Stakeholder Meeting occurs

A handover meeting occurs

All relevant parties review the UPR with the Project Manager

Client completes the Conditions of Satisfaction survey

Remaining funds are returned to the client*.

Everyone celebrates completion

**Timing for this varies depending on the project.*

- CLIENT
- PROJECT MANAGER (PM)/CLIENT
- PROJECT MANAGER (PM)
- PROJECT MANAGER (PM)/ OTHER
- EVERYONE