

## Job Aid: Fastlane Process for Rotational Contracting

### Purpose

The purpose of this job aid is to provide guidance on the new “Fastlane” process to speed projects eligible for rotational contracting through the Purchase Order creation process. These include on-call design contracts (On-Call A/E Academic, On-Call A/E Medical, On-Call A/E Small Projects, On-Call M/E Academic, On-Call M/E Medical, On-Call Structural/Civil) and construction contracts (On Call Minor GC, On-Call GC, On Call Minor Electrical Contracting, On Call Mechanical Contracting, On Call Abatement, On Call Program Management, On Call Commissioning, On Call Design/Build)

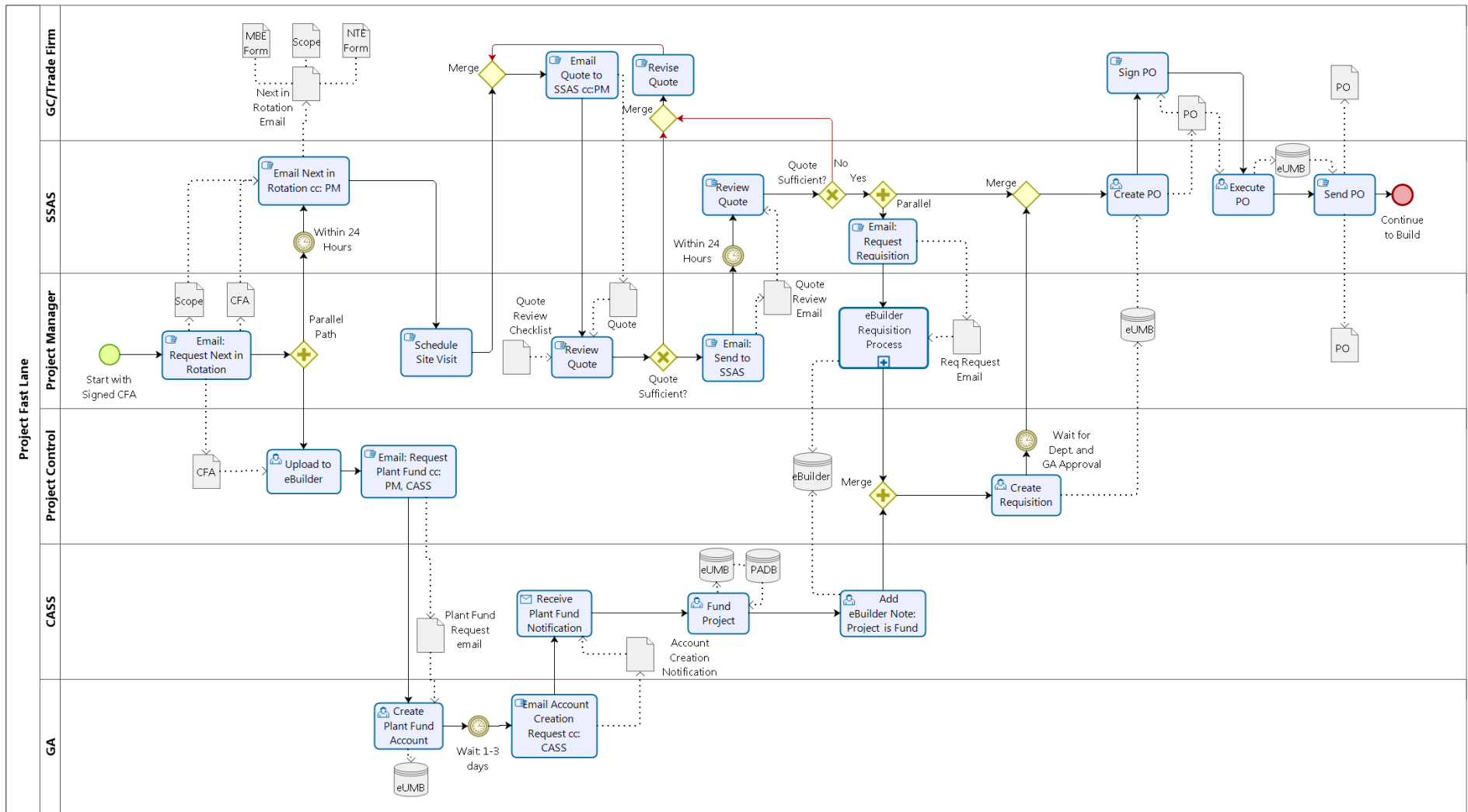
### Overview

The Fastlane process introduces a new workflow for generating purchase orders for Design and Construction projects that are eligible for rotational contracting. The goal of the process is to move projects 25% faster from project creation to purchase order creation, a savings of 9 business days. This is accomplished by reordering process steps to avoid waiting, eliminating non-value-added handoffs, and minimizing rework.

### Key Process Changes

The new process is outlined in detail on the next page, but here are the key changes for D&C, SSAS, and CASS personnel:

- **New SSAS email address ([Fastlane@umaryland.edu](mailto:Fastlane@umaryland.edu)):** A new email address has been set up specifically for correspondence on Fastlane projects. SSAS will respond to emails on Fastlane projects within 24 hours.
- **Accelerating Quote Development:** Previously, PMs needed to submit a requisition in order for SSAS to identify the next on-call rotational contractor. The new process will be to provide SSAS with a copy of the signed CFA indicating funding for the project is secured and SSAS will directly solicit the vendor to begin work on a quote. SSAS will provide vendors with a standard quote form.
- **Mistake-Proofing Requisition Amounts:** Previously, PMs needed to submit a requisition based on their estimate, which contributed to 25% of projects submitting a second requisition to add funding. The new process gets the vendor quote firmed up before submitting the requisition.
- **Detailed PM Review of Contractor Quotes:** SSAS will equip PMs with a checklist to check the quote over for common mistakes. The PM and SSAS will work with the vendor on the quote prior to submitting on a requisition.
- **Requisitions must indicate “FASTLANE”:** To signal that a requisition has followed the Fastlane project and should be moved to the top of the SSAS work pile, Project Control will indicate “FASTLANE” on the submitted requisition.



Job Aid: Project Manager Fast Lane Processes

Process Step	Relevant content
<p>1. <b>The Project Manager obtains a signed CFA and determines that the project size and scope is a fit for an on-call rotational vendor, inclusive of potential change orders.</b></p>	<p>Rotational contract limits</p>
<p>2. <b>The Project Manager emails <a href="mailto:Fastlane@umaryland.edu">Fastlane@umaryland.edu</a> to request SSAS to assign the next rotational contractor to the project. Cc: Project Control</b></p> <ol style="list-style-type: none"> <li>a. Attach the signed CFA</li> <li>b. Attach the Scope (with Schedule)</li> </ol> <p>3. <b>Project Control uploads the CFA to eBuilder.</b></p> <p>Check to make sure that the schedule dates stated include enough time for final invoicing; SSAS will use these for the PO dates.</p>	<p><b>From:</b> UMB Project Manager  <b>To:</b> <a href="mailto:FastLane@umaryland.edu">FastLane@umaryland.edu</a>  <b>Subject:</b> Rotational Request: <a href="#">Project 19-XXX</a></p> <p>SSAS,  Please assign the next <u>On-Call _____ (i.e. GC, etc.)</u> in the rotation.  CFA and Scope (with Schedule) are attached below.</p> <p>Thanks,  UMB Project Manager</p> <p><b>2 attachments</b></p> <p><a href="#">Project 19-XXX Scope.pdf</a>  <a href="#">Project 19-XXX Signed CFA.pdf</a></p>
<p>4. <b>SSAS will contact the next contractor in the rotation within 24 hours and cc: the Project Manager.</b></p> <ol style="list-style-type: none"> <li>a. Attach the Scope of Work</li> <li>b. Attach the NTE bid sheet</li> <li>c. Attach the MBE forms</li> <li>d. Update the SSAS tracking spreadsheet</li> </ol>	<p><b>From:</b> SSAS Buyer  <b>To:</b> “Next On-Call GC”  <b>CC:</b> UMB Project Manager  <b>Subject:</b> On-Call Contract: Request for <a href="#">insert appropriate language (NTE Quote or A/E Quote or Proposal)</a> for <a href="#">Project 19-XXX</a></p> <p><b>Rotation No.:</b> <a href="#">insert rotation number</a>  <b>Contract No.:</b> <a href="#">insert contract number</a>  <b>Contractor Name:</b> <a href="#">insert Contractor name</a>  <b>Contractor Contact:</b> <a href="#">insert Contractor Name, number and email</a>  <b>UMB Contact:</b> <a href="#">insert PM Name, number and email</a></p> <p>Per your on-call contract with the University of Maryland, Baltimore, <a href="#">X General Contractors</a> is invited to bid the attached project scope of work. Please reply to this email (cc: UMB Project Manager) with a quote no later than <a href="#">insert date (within 14 calendar days)</a>; UMB reserves the right to request a quote from the next vendor in rotation if a timely quote is not received. If you do not wish to perform this work, please reply</p>

	<p>to this email immediately. A form has been attached to help structure your <u>insert appropriate form (Not-to-Exceed (NTE) or A/E Proposal)</u>; note that all NTE bids must include cost breakdowns for subcontractors as well.</p> <p><b>MBE Requirement for this task order:</b> ___% with sub-goals (if applicable provide information)</p> <p><b>The UMB Project Manager has been copied on this email. Please contact them as soon as possible to schedule a walk-through.</b></p> <p>Thank you, <u>Buyer</u> UMB Strategic Sourcing and Acquisition Services</p> <p><b>3 attachments</b> <u><a href="#">Project 19-XXX Scope.pdf</a></u> <u><a href="#">NTE bid form.docx</a></u> <u><a href="#">MBE Documentation.docx</a></u></p>
<p><b>5. The Project Manager contacts the Contractor to schedule a site visit and/or answer questions.</b></p>	
<p><b>6. The Contractor replies to the email from SSAS (cc: Project Manager) with a quote for the scoped work using the NTE form.</b></p>	<p><b>From:</b> Next On-Call GC <b>To:</b> SSAS Buyer <b>CC:</b> UMB Project Manager <b>Subject:</b> Re: On-Call Contract: Request for <u>insert appropriate language (NTE Quote or A/E Quote or Proposal)</u> for Project 19-XXX</p> <p>Buyer, Please see our attached quote for project 19-XXX. Let me know if you have any questions. Best, Next On-Call GC</p> <p><b>1 attachment</b> <u><a href="#">Project 19-XXX Quote.pdf</a></u></p>
<p><b>7. The Project Manager reviews quote using the Quote Review Checklist. Insufficient quotes are sent to the contractor for revisions.</b></p>	<p style="text-align: center;"><b>Quote Review Checklist</b></p> <ol style="list-style-type: none"> <li>1) Confirm quote covers the requested scope of work with nothing omitted from or added to the scope.</li> <li>2) Quotes do not exceed task order limits.</li> <li>3) Math correct on the face of the quote.</li> <li>4) Breakdown of General Conditions with corresponding allowance.</li> <li>5) Quantities and Unit Prices (w/breakout of material and labor costs) w/quoted mark-up and/or unit price(s).</li> </ol>

	<ol style="list-style-type: none"> <li>6) Subcontractor costs (w/breakout of material and labor costs) w/quoted mark-up and/or unit price(s).</li> <li>7) A list of proposed subcontractors, if any.</li> <li>8) Cost is to the nearest penny. (If a contractor uses rounding it must be to the nearest penny and the contractor must round up and down, not just up.)</li> <li>9) No additional fees (i.e. MBE, burden, parking and travel, etc.)</li> <li>10) Read any exclusions and clarifications and confirm there is no obviously conflicting language.</li> <li>11) Verify Key Personnel (Project Manager, Field Superintendent, and Foremen) against contract (see <a href="#">SSAS FTP site</a>).</li> <li>12) MBE forms attached (if applicable)</li> <li>13) MBE % met</li> </ol>
<p><b>8. The Project Manager emails the quote to SSAS for a one-touch review.</b></p>	<p><b>From:</b> UMB Project Manager  <b>To:</b> <a href="mailto:FastLane@umaryland.edu">FastLane@umaryland.edu</a>  <b>Subject:</b> FW: Re: Rotational Request: Project <b>19-XXX</b></p> <p>SSAS,</p> <p>I reviewed the attached quote using the SSAS checklist and found no errors. Please proceed with your QA review.</p> <p>Thank you,</p> <p>UMB Project Manager</p> <p><b>2 attachments</b></p> <p style="text-align: center;"><a href="#">Project 19-XXX Quote.pdf</a>  <a href="#">Project 19-XXX NTE Bid Sheet.docx</a></p>
<p><b>9. SSAS completes a one-touch QA review</b> within 24 hours. Insufficient quotes are sent to the contractor (<b>cc: Project Manager</b>) for revisions.</p>	

<p>10. <b>SSAS emails the Project Manager to signal that the quote is sufficiently detailed and correct</b>, and that the Requisition can be submitted.</p> <p>a. Attach MBE forms for Contractor to begin preparing</p>	<p><b>From:</b> SSAS Buyer  <b>To:</b> UMB Project Manager  <b>CC:</b> Next On-Call GC; Lindsay Nichols  <b>Subject:</b> Re: FW: Re: Rotational Request: Project 19-XXX  <b>Rotation No.:</b> <a href="#">insert rotation number</a>  <b>Contract No.:</b> <a href="#">insert contract number</a>  <b>UMB Contact:</b> <a href="#">insert PM Name, number and email</a></p> <p>Project Manager: The quote is acceptable and the requisition may be submitted. Please add "FASTLANE" to the comment field of the Requisition.          MBE Requirement for this task order: ___% with subgoals (if applicable provide information)          Contractor: Please submit the attached MBE form within <a href="#">insert date (within 10 business days)</a> so UMB can process a purchase order without delay.</p> <p>Thanks,          SSAS Buyer</p> <p><b>1 attachment</b>  <b>MBE Form.docx</b></p>
<p>11. <b>The Project Manager completes the eBuilder Requisition Process.</b></p>	
<p>12. <b>Project Control emails General Accounting to request Plant Fund Account</b> using information on the CFA form.</p> <p>a. Attach Signed CFA form</p>	<p>Project Control emails General Accounting with the following:</p> <p><b>From:</b> Project Control  <b>To:</b> DL-BFGeneralAccounting@umaryland.edu  <b>CC:</b> CASS  <b>Subject:</b> <a href="#">00433-Project ID # Request</a></p> <p>Hello,</p> <p>Requesting a new project ID for attached CFA. Additional information below:</p> <p><b>PCBU:</b> <a href="#">00433</a>  <b>Owner Department:</b> 06504011  <b>Fund:</b> <a href="#">430</a>  <b>Program:</b> <a href="#">601</a></p> <p>Thanks,          Project Control</p> <p><b>1 attachment</b>  <b><a href="#">Project 19-XXX CFA.pdf</a></b></p>

<p><b>13. General Accounting creates the Plant Fund Account in eUMB</b> for the new project.</p>	
<p><b>14. General Accounting sends account creation email to CASS, cc: Project Control</b> to confirm that a new Plant Fund Account has been created.</p>	
<p><b>15. CASS funds the project in eUMB.</b></p>	
<p><b>16. CASS adds a note to the project in eBuilder</b> to signal that the project has been funded.</p>	<p><b>Sample eBuilder note from CASS:</b> <u>Project XX-XXX funded on MM/DD/YYYY.</u></p>
<p><b>17. Project Control creates a Requisition in eUMB.</b></p> <ul style="list-style-type: none"> <li>a. <b>Note "FASTLANE" in the comments field</b> to signal to SSAS that the requisition needs to be processed within 24 hours of receipt.</li> <li>b. Attach Scope</li> <li>c. Attach Vendor Quote</li> </ul>	
<p><b>18. The Contractor Completes MBE Forms.</b> The Contractor sends completed MBE forms to SSAS.</p>	
<p><b>19. SSAS creates a Purchase Order</b> for the scoped work.</p> <ul style="list-style-type: none"> <li>a. SSAS executes the Purchase Order in eUMB.</li> <li>b. SSAS sends the Purchase Order to the Contractor and the Project Manager.</li> </ul>	
<p><b>20. Process Complete.</b> Move to Build</p>	