

**Scotia Union School District
Amy Gossien, Superintendent
417 Church Street
Scotia, CA 95565**

(707)764-2212

REQUEST FOR PROPOSALS AND QUALIFICATIONS

for

**LEASE LEASEBACK CONSTRUCTION SERVICES FOR THE
STANWOOD A. MURPHY ELEMENTARY
SCHOOL GYMNASIUM BUILDING PROJECT**

RFP Issued: April 16, 2021

Mandatory Walk-Thru: N/A

Sealed Proposals Due: May 3, 2021 at 1:00 PM

Interviews: May 4-7, 2021

Selection by Governing Board: Tentative Date of May 13, 2021

Request for Sealed Fee Proposals and Qualifications

For Lease-Leaseback Construction Services

Scotia Union School District Gymnasium Project

Pursuant to Education Code section 17400 et seq., the Scotia Union School District (“District”) invites qualified firms to submit responses to this request for proposals and qualifications (“RFP”) to provide lease leaseback (“LLB”) construction services for the Gymnasium Construction (“Project”) located at 230 Mill Street, Scotia, CA 95565.

Respondents must email, mail or hand-deliver an original + three (3) copies of their sealed proposal for the Project to:

Amy Gossien
Superintendent
470 Church Street / P.O. Box 217
Scotia, CA 95565
Email: agossien@scotiaschool.org

All responses must be received by the District no later than 1:00 PM on Monday, May 3, 2021.

[*Optional*] An informational meeting will be held at N/A am/pm on _____, _____. The meeting will be held at the _____, located at _____. To attend the meeting virtually, please contact _____ at _____ no later than _____ pm on _____ for the Zoom link.

The RFP and construction documents are available for download at the following link:

<https://siskiyoudesigngroup.egnyte.com/fl/pKbXYyqsNV>

Questions regarding this RFP shall be directed to Guy Fryer at Siskiyou Design Group, Inc. and must be submitted on or before 1:00 pm on Wednesday, April 28, 2021.

Sincerely,

Amy Gossien,
Superintendent

PART I

BACKGROUND & INSTRUCTIONS

A. Background

The Scotia Union School District (“District”) is a single school district that serves students in grades Transitional Kindergarten-Eighth. The District is located in Humboldt County.

The District has retained Siskiyou Design as its architect for the Project (“Architect”). DSA approval of the plans and specifications for the Project has not yet been issued, but will be obtained after award of the Lease-Leaseback Agreement.

B. Scope of Work

The Project will consist of:

1. Demolition of existing original non-field act Recreation Building (18,500 SF).
2. Construction of New Gymnasium facility (12,536 SF) including site development, testing and remediation of existing non-conforming retaining walls.

The purpose of this RFP is to assemble a pool of qualified persons, firms, partnerships, corporations, associations, or professional organizations to provide design, constructability review, value engineering, master scheduling, cost estimating, budgeting, and construction services for the development and construction for the Gymnasium Project (“Project”), in accordance with the lease-leaseback structure set forth in Education Code section 17400 et seq. The selected Contractor shall have experience with the construction of public school facilities and in working with the Office of Public School Construction (“OPSC”), the Division of the State Architect (“DSA”), and Title 24 of the California Code of Regulations. To submit a proposal, Contractors must be properly licensed by the California Contractors State License Board and registered with the Department of Industrial Relations (“DIR”) as required by law. The selected Contractor will be required to comply with the Labor Code prevailing wage requirements and the District’s bonding and insurance requirements. The selected Contractor shall be required to work cooperatively with District staff, the Governing Board, all other technical consultants, the architect, the project inspector, and any program and/or construction manager, if any, retained by the District for the Project, citizens’ oversight committee, other District committees, and the community to facility timely and professional completion of the Project.

Construction and Post Construction Services:

The Contractor shall perform all work and obligations described in the attached Lease Leaseback Agreement, including the following construction and post-construction services:

1. Construction of the Project in accordance with the plans and specifications.
2. Coordinate and expedite record drawings and specifications.

3. Compile operations and maintenance manuals, warranties/guarantees, and certificates.
4. Prepare final accounting and close-out reports.
5. Other responsibilities necessary for the completion of the Project in accordance with the plans and specifications.

C. Contract Requirements

DSA approval of the plans and specifications for the Project has not yet been obtained. The Contractor will be expected to enter into the Lease Leaseback Agreement for all construction work. Once DSA approval is obtained, the selected Contractor shall provide the District with objectively verifiable information of its costs to perform the Project and a written rationale for the total construction cost, including documentation sufficient to support the calculation (“Total Base Rent”). Contractor’s written rationale shall detail the “base construction cost” for the Project, consisting of (a) all subcontracts to be awarded by Contractor for the Project, plus (b) any separately awarded contracts for materials and supplies for the Project. The District Governing Board shall approve or reject the Total Base Rent at a public meeting and execute the Exhibit D: Schedule of Lease Payments before the Contractor may proceed with the Project.

We are anticipating the construction time frame for the Project as follows:

1. Construction drawings completed by Siskiyou Design Group, Inc.
2. DSA submittal by: **PLEASE SEE ATTACHED SCHEDULE**
3. Expected DSA back-check & approval by: **PLEASE SEE ATTACHED SCHEDULE**
4. LLB contractor’s submission of final Total Base Rent & approval by _____
5. Construction administration: TBD
6. DSA Close-out: _____

See the Lease Leaseback Agreement and other Contract Documents for additional details.

The Contract Documents for the Project will consist of:

- i. the District’s Administrative Regulation 3311.2
- ii. the RFP and the Contractor’s completed Qualification Questionnaire
- iii. the Lease Leaseback Agreement for Construction Services, including the Project plans and specifications
- iv. the Site Lease
- v. the Facilities Lease
- vi. the LLB General Conditions
- vii. the Payment and Performance Bonds, and
- viii. the Certificates of Insurance for the Project, if applicable.

D. Scope of Fee Proposal

The District's proposed estimate of the Project price is not to exceed \$8,000,000.00, which is inclusive of contingency costs. This estimate is based solely on the Architect's most recent estimate of the total Project costs and is subject to change.

Construction and Post Construction Services

Contractor's fee proposal for construction and post construction work shall be in the form of a percentage ("Percentage") to be applied to the construction cost of the Project as determined in accordance with Education Code section 17406(a)(3). Once the construction cost is determined, the successful Contractor's Percentage will be applied to that construction cost to determine the Total Base Rent of the Project. Contractor will accept the Total Base Rent as total compensation for its overhead, general conditions expenses and profit on the Project. Contractor's costs that are intended to be covered by the Total Base Rent, include, but are not limited, to, the following:

1. General conditions and general requirements, including but not limited to temporary facilities, utilities, structures, fences, dust control, scheduling, safety, scaffolding, and SWPPP.
2. Overhead and profit.
3. Supervision of subcontractors and suppliers and other management responsibilities.
4. All bonds and insurance, including but not limited to payment and performance bonds.
5. Contractor mark-up on subcontracted labor and materials.
6. Contractor mark-up on materials.
7. Contractor mark-up on self-performed labor.

E. Subcontractors

All subcontractors who will perform more than 0.5% of the construction work must be selected by a competitive bidding process or best value process as described in Education Code section 17406(a)(4) and must be registered with DIR as required by law. Contractor shall establish reasonable qualification criteria and standards for subcontractors and shall provide public notice of availability of work to be subcontracted in accordance with the publication date applicable to the District's competitive process, including a fixed date and time on which qualifications statements, bids, or proposals will be due.

All subcontractors shall be afforded the protections of the Subletting and Subcontracting Fair Practices Act (commencing with Public Contract Code section 4100).

F. Selection Procedures and Guidelines

The purpose of this RFP is to enable the District to select the Contractor that submitted the proposal that is the best value to the District for the Project as required by Education Code section 17406. The term "best value" as used in this RFP is defined in Education Code section 17400, and is inclusive of a competitive procurement process whereby the Contractor is selected on the basis of objective criteria for evaluating qualifications with the resulting selection representing the best combination of price and qualifications.

The District will use the selection process outlined below, which conforms to Education Code section 17406 and ensures that the best value selection by the District is conducted in a fair and impartial manner. A review and selection committee composed of key District officials and consultants will review and evaluate all proposals.

Proposals will be opened privately to assure confidentiality and to avoid disclosure of the contents to competing Contractors prior to and during the review and evaluation process. Following selection of a Contractor pursuant to this RFP, proposals may be subject to disclosure in accordance with applicable law.

Selection Process

Qualification Questionnaire Portion

For the qualifications portion of the best value analysis, the District will evaluate the specific criteria listed in the Qualification Questionnaire and each Contractor's qualifications will be scored using the scoring criteria set forth in the Qualification Questionnaire. The total maximum score for each Contractor is 140 points.

Fee Percentage Proposal Portion

For the fee percentage proposal portion of the best value analysis, the District will evaluate the amount of Contractor's fee percentage proposal. The fee percentage proposal portion of the best value analysis will be scored on a 100 point scale. The District will score Contractors on the basis of the lowest to highest price proposal submitted. All Contractors submitting a price proposal will receive points, in increments of ten (10), based on the amount of the price proposal, with the Contractor with the lowest price proposal receiving the most points available and the Contractor with the highest price proposal receiving the fewest points available. Specifically, the Contractor with the lowest fee percentage proposal will receive 100 points, the Contractor with the second lowest fee percentage proposal will receive 90 points, the Contractor with the third lowest fee percentage proposal will receive 80 points, and so forth until all Contractors have received points. In the event two Contractors submit fee percentage proposals with the same overall percentage, both Contractors shall be awarded the same amount of points.

Interview Portion

The interview portion will consist of interviewing selected contacts listed in Qualification Questionnaire from at least two completed similar type projects and an interview with the Contractor.

Reference Interviews

In each interview question, the person being interviewed is asked to rate a certain aspect of the Contractor's performance, using a scale of 1 to 10. The highest possible score is 130 points for each interview. A score of between 91 and 110 on one interview indicates the District should conduct another interview to collect additional information. If an additional interview is

required, the District shall take the highest two interview scores to determine the best value score. Contractors will be ranked based on their combined interview scores.

Contractor Interviews

Each Contractor will be asked the identical set of questions. The questions will be scored based on the enclosed Interview Scoring Matrix. The highest possible score is 400 points for the interview. Contractors will be ranked based on their overall interview score.

Total Best Value Score

After the District has allocated points to qualifying Contractors for the qualification, price proposal, and interview portions of the best value analysis, the District will combine the points received by each Contractor based on Contractor's qualifications, price proposal and interviews to create each Contractor's best value score. District will then rank all Contractors based on each Contractor's best value score. The Contractor with the highest best value score (highest combined point total from the qualifications and price proposal analysis) shall be ranked highest, and all remaining Contractors shall be ranked in descending order based on the Contractor's best value score, such that the Contractor receiving the lowest best value score receives the lowest ranking.

G. Award

The District reserves the right to reject any or all proposals, or waive any irregularities in any of the proposals submitted pursuant to this RFP. The Lease Leaseback Agreement shall be awarded to the responsive Contractor with the highest best value score. In the event of a tie (more than one Contractor have the same highest best value score), District may award the Project to the Contractor of its choice.

The Board is expected to make its selection at a regular meeting on Thursday, May 13, 2021. The meeting will be held at 7:00 p.m. at Stanwood A. Murphy Elementary School Library. The District will issue a statement regarding the basis of the award.

If the Contractor to which the Board awards the Project refuses to execute the Lease Leaseback Agreement or submit a payment bond, performance bond, proof of required insurance, and other required documents within ten (10) business days following award, the Board may revoke the award to that Contractor and award to the Contractor that submitted the next highest ranked proposal.

H. Anticipated Schedule for selecting the LLB Contractor

The following schedule has been established by the District for selection of the Contractor:

See attached schedule Advertisement of the request for proposals;

N/A [*Optional*] Mandatory Walk-Thru

April 28, 2021 @ 1:00 pm	Deadline for Questions to District
TBD	RFP Addendum Deadline
May 3, 2021 @ 1:00 pm	Response to RFP due
May 4-7, 2021	Contractor Interviews
	Evaluation of all the responses
May 13, 2021	Selection of the Contractor by the District Board

This timeline may be revised as needed. Evaluations, selection and recommendation will be based on the Contractor’s response, demonstrated competence and overall qualifications as presented in the response to this RFP.

I. Instructions for Submitting Proposals

1. GENERAL: The District intends to select the firm that best meets the District’s needs to perform the construction services described in this RFP.
2. RECEIPT OF PROPOSALS: All proposals shall be sealed and delivered to and in the possession of the District by the time and date specified in this RFP.
3. ACCEPTANCE OR REJECTION OF PROPOSALS: The District Board of Trustees will accept the best value proposal for the Project. The Board of Trustees of the District reserves the right to reject any and all proposals, or any or all items of any proposal as permitted by law, and to waive non-material variances.
4. PROPOSAL FORM REQUIREMENTS: All proposals must be typed. No changes can be made after the time for submitting the proposals without the District’s written approval.
5. SIGNATURE FORMAT: All proposals shall be signed at the end of the document by an authorized representative with authority to bind the firm; the signature shall be preceded by the following statement: “The undersigned is authorized to sign this response on behalf of the Contractor, and he/she hereby attests that all of the answers and responses to this RFP are true and correct to the best of his/her knowledge, after due investigation, under penalty of perjury under the laws of the State of California.”
6. ADDENDA OR BULLETINS: The District reserves the right to issue addenda or bulletins prior to the opening of the proposals subject to the limitations of Public Contract Code §4104.5. Any addenda or bulletins issued prior to the proposal deadline will be posted on the District’s website and shall be considered a part of the Contract Documents.
7. ASSIGNMENT PROHIBITED: No contract awarded under this RFP shall be assigned except with the prior written approval of the Board of Trustees of the District. Any

attempted assignment in violation of the provision shall be voided at the option of the Board.

8. FEDERAL OR STATE REGULATIONS: The proposal and any contract entered into are subject to all applicable statutes of the United States or of the State of California and all applicable regulations and orders of the Federal or State governments now in effect or which shall be in effect during the period of such contract.
9. NON-DISCRIMINATION: The Contractor shall not discriminate against any employee or applicant for employment because of race, color, ancestry, nationality, national origin, immigration status, ethnic group identification, ethnicity, age, religion, marital status, pregnancy, parental status, physical or mental disability, sex, sexual orientation, gender, gender identity, gender expression, or genetic information; a perception of one or more of such characteristics; or association with a person or group with one or more of these actual or perceived characteristics.
10. SECURITIES: The substitution of appropriate securities in lieu of retention amounts from progress payments in accordance with Public Contract Code §22300 is permitted.
11. BINDING FOR 60 DAYS: No proposal may be withdrawn for a period of sixty (60) days after the date set for the opening for proposals except as provided by Public Contract Code §§5100 *et seq.* The District reserves the right to reject any and all proposals and to waive any informalities or irregularities in the process.
12. PREVAILING WAGE MONITORING: The project is subject to compliance monitoring and enforcement by the California Department of Industrial Relations. In accordance with SB 854, all contractors and subcontractors working at the site shall be duly registered with the Department of Industrial Relations at time of proposal opening and at all relevant times. Proof of registration shall be provided as to all such contractors prior to the commencement of any work.
13. N/A: MANDATORY WALK-THRU MEETING: A mandatory walk-thru meeting will be held at _____, on _____ at _____ a.m./p.m. for the purpose of acquainting all prospective proposers with the Contract Documents and the Project site. Failure to attend the conference will result in the disqualification of the proposer of the non-attending firm.
14. REQUESTS FOR INFORMATION: A Contractor's failure to request clarification or interpretation of an apparent error, inconsistency or ambiguity in the Contract Documents waives that Contractor's right to thereafter claim entitlement to additional compensation based upon an ambiguity, inconsistency, or error, which should have been discovered by a reasonably prudent Contractor, subject to the limitations of Public Contract Code §1104. Any questions relative to the RFP shall be in writing and directed to the designee at the address specified in this RFP. These requests shall be submitted to Guy Fryer at Siskiyou Design Group, Inc. no later than Wednesday, April 28, 2021 @ 1:00 PM.

15. NO LOBBYING OR CONTACTS: Except during a public meeting noticed under the Brown Act, proposers shall not contact District officials, employees or representatives regarding this RFP, except for the specific District representative identified in this RFP.
16. EXAMINATION OF CONTRACT DOCUMENTS AND WORK SITE: Before submitting a proposal, all Contractors shall carefully examine the Contract Documents, including the plans and specifications, shall visit the site of the proposed work, and shall fully inform themselves of all conditions in and about the work site, as well as applicable federal, state and local laws and regulations that may affect the work. No Contractor shall visit the site without prior authorization of the District. Contractors shall contact the District Superintendent or designee for coordination of site visits.
17. SCORING/RANKING PROTEST PROCEDURE: Any protest of the best value scoring, ranking process and/or the determination shall be in writing and received by the District Office before 5:00 p.m. no later than three (3) working days following distribution by the District of the best value scoring and ranking report; any such protest shall comply with the following requirements:
 - a. The protest must contain a complete statement of the basis for the protest and all supporting documentation.
 - b. The party filing the protest must have actually submitted a proposal for the Project. A Subcontractor of a proposer submitting a proposal for the Project may not submit a proposal protest. A proposer may not rely on the proposal protest submitted by another proposer, but must timely pursue its own protest.
 - c. The protest must refer to the specific portion or portions of the Contract Documents upon which the protest is based.
 - d. The protest must include the name, address and telephone number of the person representing the protesting proposer.
 - e. The proposer filing the protest must concurrently transmit a copy of the protest and all supporting documentation to all other proposers with a direct financial interest which may be affected by the outcome of the protest, including all other proposers who appear to have a reasonable prospect of receiving an award depending upon the outcome of the protest.
 - f. The proposer whose ranking has been protested may submit a written response to the protest. Such response shall be submitted to the District before 5 p.m. no later than two (2) working days after the deadline for submission of the protest or receipt of the protest, whichever is sooner, and shall include all supporting documentation. Such response shall also be transmitted concurrently to the protesting firm and to all other proposers who appear to have a reasonable prospect of receiving an award depending upon the outcome of the protest.
 - g. The District shall evaluate all of the evidence presented and shall make a determination as to whether the protest is warranted and whether any additional action needs to be taken. The decision of the District shall be final.
 - h. The procedure and time limits set forth in this section are mandatory and are the proposer's sole and exclusive remedy in the event of proposal protest. The proposer's

failure to comply with these procedures shall constitute a waiver of any right to further pursue the protest, including filing a Government Code claim or legal proceedings.

- i. If the District determines that a protest is frivolous, the protesting proposer may be determined to be non-responsible and that proposer may be determined to be ineligible for future contract awards by the District.
- j. A “working day” for purposes of this section means a weekday during which the District’s office is open and conducting business, regardless of whether or not school is in session.

PART II

PROPOSAL REQUIREMENTS

An original + three (3) copies of the proposal must be provided, via email, mail or hand delivery, with no more than 30 single-sided pages in total length.

All Contractors submitting an RFP are required to follow the order and format specified below. Failure to follow the specified order and format may result in rejection of a proposal. Please tab each section of the submittal to correspond to the numbers/headers shown below.

A. Proposal Cover

The proposal shall include a cover page, which cover page shall set forth the RFP's title and submittal due date, the name, address, fax number, and the telephone number of responding firm (or firms if there is a joint venture or association).

B. Proposal Content

Your firm's Proposal shall include the following information:

1. Qualification Questionnaire
2. Proposal
3. Worker's Compensation Certification
4. Fingerprinting Certification

QUALIFICATION QUESTIONNAIRE

CONTACT INFORMATION

Firm Name: _____ Check One: Corporation
 (as it appears on CSLB license) Partnership
 Sole Prop.
 LLC
 Joint Venture

Contact Person/Title: _____
 (List Owner(s) if Firm is a Sole Proprietorship or Partnership)

Local Address: _____

Phone: _____ Fax: _____

Mobile: _____ Email: _____

List all California construction or other professional license numbers, classifications and expiration dates held by your firm:

License Number	Classification	Expiration Date

List your firm's DIR Public Works Contractor (PWCR) Registration Number(s):

PWCR Number	Entity Name	Expiration Date

If any of your firm’s license(s) are held in the name of a corporation, limited liability company, or partnership, list below the names of the qualifying individual(s) listed on the CSLB records who meet(s) the experience and examination requirements for each license.

License Number	Qualifying Individual	Expiration Date

PART I.
ESSENTIAL REQUIREMENTS FOR QUALIFICATION

Any Contractor that cannot satisfy all of Part I, regardless of the ranking or ability to meet other criteria, will not be considered for this RFP/Q.

1. Does your firm possess a valid and current California Contractor's license or other professional license as required by law for the Project?

Yes No

2. Does your firm have a liability insurance policy with a policy limit of at least \$2,000,000 per occurrence and \$4,000,000 aggregate?

Yes No

3. Does your firm meet the "skilled workforce" requirements set forth under Education Code section 17407.5?

Yes No

4. Does your firm have a current workers' compensation insurance policy as required by the Labor Code or is legally self-insured pursuant to Labor Code section 3700 et. seq.?

Yes No Contractor is exempt from this requirement, because it has no employees.

5. Has your firm completed at least two California public school K-12 construction projects of at \$1 million dollars, subject to DSA approval within the last three (3) years?

Yes No

If "Yes" list on a separate sheet the names of the projects, their location, the owner, the project manager, the project superintendent, contact information, project amount, and the date each project was commenced and completed.

6. Is your firm currently registered with the Department of Industrial Relations and qualified to submit a bid or proposal and to otherwise perform work on a public project pursuant to Section 1725.5 of the Labor Code?

Yes No

7. Has your firm's contractor's license been revoked or suspended at any time in the last five years, even if later reinstated retroactively?

Yes No

8. Has a surety firm completed a contract on your firm's behalf, or paid for completion because your firm was default terminated by the project owner within the last five years?

Yes No

9. Is your firm, any of its officers, supervisors, managers, or any firm or individual identified herein ineligible to bid or be awarded a public works contract, or perform as a subcontractor on a public works contract, pursuant to Labor Code section 1777.1 or Labor Code section 1777.7, or any other federal, state, county, municipal or other local law providing for the debarment of contractors from public works?

Yes No

If the answer is "Yes," state the beginning and ending dates of the period of debarment:

10. Has your firm, any of its officers, supervisors, managers, or any firm or individual identified herein been convicted of a crime involving the awarding of a contract of a government construction project, the bidding or performance of a government contract, antitrust statutes, racketeering statutes, safety and health regulations, environmental laws, laws banning workplace discrimination, laws governing wages, hours or labor standards, or laws involving fraud, theft, or any other act of dishonesty?

Yes No

PART II.

**ORGANIZATION, HISTORY, ORGANIZATIONAL PERFORMANCE, COMPLIANCE
WITH CIVIL AND CRIMINAL LAWS**

A. Current Organization and Structure of the Business

For Firms That Are Corporations:

- 1a. Date incorporated: _____
- 1b. Under the laws of what state: _____
- 1c. Provide all the following information for each person who is either (a) an officer of the corporation (president, vice president, secretary, treasurer), or (b) the owner of at least ten per cent of the corporation's stock.

Name	Position	Years with Co.	% Ownership	Social Security #

- 1d. Identify every construction firm that any person listed above has been associated with (as owner, general partner, limited partner or officer) at any time during the last five years.
NOTE: For this question, "owner" and "partner" refer to ownership of ten percent or more of the business, or 10 percent or more of its stock, if the business is a corporation.

Person's Name	Construction Firm	Dates of Person's Participation with Firm

For Firms That Are Limited Liability Companies (LLC):

- 1a. Date Article of Organization filed: _____
- 1b. Under the laws of what state: _____
- 1c. Provide all the following information for all members of the LLC:

Name	Position	Years with Firm	% Ownership

- 1d. Identify every construction firm that any person listed above has been associated with (as owner, general partner, limited partner or officer) at any time during the last five years.
NOTE: For this question, “owner” and “partner” refer to ownership of ten percent or more of the business, or ten percent or more of its stock, if the business is a corporation.

Person’s Name	Construction Firm	Date of Person’s Participation with Firm

For Firms That Are Partnerships:

- 1a. Date of formation: _____
- 1b. Under the laws of what state: _____
- 1c. Provide all the following information for each partner who owns 10 percent or more of the firm.

Name	Position	Years with Co.	% Ownership	Social Security #

1d. Identify every construction company that any partner has been associated with (as owner, general partner, limited partner or officer) at any time during the last five years.

NOTE: For this question, “owner” and “partner” refer to ownership of ten per cent or more of the business, or ten per cent or more of its stock, if the business is a corporation.

Person’s Name	Construction Company	Dates of Person’s Participation with Company

For Firms That Are Sole Proprietorships:

1a. Date of commencement of business: _____

1b. Social security number of company owner: _____

1c. Identify every construction firm that the business owner has been associated with (as owner, general partner, limited partner or officer) at any time during the last five years.

NOTE: For this question, “owner” and “partner” refer to ownership of ten percent or more of the business, or ten percent or more of its stock, if the business is a corporation.

Person’s Name	Construction Company	Dates of Person’s Participation with Company

For Firms That Intend to Make a Bid as Part of a Joint Venture:

- 1a. Date of commencement of joint venture. _____
- 1b. Provide all of the following information for each firm that is a member of the joint venture that expects to bid on one or more projects:

Name of firm	% Ownership of Joint Venture

Note: Explain on a separate sheet. Provide all other pertinent information required in the sections above, for each Corporation, LLC, Partnership, or Sole-Proprietorship that is a part of the Joint Venture

For All Applicants:

1. Has there been any change in ownership of the firm at any time during the last three years?

NOTE: A corporation whose shares are publicly traded is not required to answer this question.

Yes No

If “yes,” explain on a separate signed page.

2. Has your firm changed names or license number in the past five years?

Yes No

If “yes,” explain on a separate signed page, including the reason for the change.

3. Is the firm a subsidiary, parent, holding company or affiliate of another construction firm?

NOTE: Include information about other firms if one firm owns 50 per cent or more of another, or if an owner, partner, or officer of your firm holds a similar position in another firm.

Yes No

If “yes,” explain on a separate signed page.

4. Are any corporate officers, partners or owners connected to any other construction firms.

NOTE: Include information about other firms if an owner, partner, or officer of your firm holds a similar position in another firm.

Yes No

If “yes,” explain on a separate signed page.

5. Has any owner, partner or officer of your firm operated a construction firm under any other name in the last five years?

Yes No

If “yes,” explain on a separate signed page, including the reason for the change.

6. State your firm’s gross revenues for each of the last three years:

Current Year: _____

Previous Year: _____

Year prior to previous year: _____

7. Please attach your most current reviewed or audited year-end financial statement, which must have been prepared by a certified public accountant, within twelve (12) months of submission of this proposal package.¹ In addition, please provide your most current financial statement, which must have been prepared within three (3) months of submission of this proposal package. This second financial statement may be prepared by an employee of the firm.²

¹ This financial statement shall not be prepared by any individual who is in the regular employ of the firm submitting the statement, nor by any individual or entity who has more than a ten percent (10%) financial interest in the firm’s business. If the individual or entity that prepared the audited year-end financial statement submitted with this proposal package has any financial interest in the firm’s business, the firm shall notify the District of such financial interest in a separate signed statement accompanying this proposal package.

² Public Contract Code section 20101(e) exempts from this requirement a contractor who has qualified as a small business pursuant to Government Code section 14837(d)(1), if the proposal is “no more than 25 percent of the qualifying amount

8. Name of accounting firm and primary contact: _____

 Address: _____
 Telephone: _____
9. How many years has this accounting firm prepared financial statements for you? _____

B. History of the Business and Organizational Performance

1. How many years has your organization been in business in California as a contractor under your present business name and license number? _____ Years
2. Is your firm currently the debtor in a bankruptcy case?
 Yes No

If “yes,” please attach a copy of the bankruptcy petition, showing the case number, and the date on which the petition was filed.

3. Was your firm in bankruptcy or receivership at any time during the last five years?
 Yes No

If “yes,” please attach a copy of the bankruptcy petition, showing the case number and the date on which the petition was filed, and a copy of the Bankruptcy Court’s discharge order, or of any other document that ended the case, if no discharge order was issued.

4. Has any CSLB license held by your firm or its Responsible Managing Employee (RME) or Responsible Managing Officer (RMO) been suspended within the last five years?
 Yes No

If “yes,” please explain on a separate signed sheet.

5. Does your firm currently have a permanent administrative office in the county where the project is located that has been in existence for at least two years (jobsite field offices shall not be included)?

provided in section 14837(d)(1).” A contractor seeking to invoke this exemption shall submit documentation evidencing its qualification for this exemption. As of January 1, 2001, the qualifying amount is \$10 million, and 25% of that amount is \$2.5 million.

Yes No

6. Has your firm completed at least three (3) public works projects in the county in which the project is located within the last two years?

Yes No

C. Disputes

1. At any time in the last five years has your firm been assessed liquidated damages after completion of a project under a construction contract with either a public or private owner?

Yes No

If yes, explain on a separate signed page, identifying all such projects by owner, owner's address, the date of completion of the project, amount of liquidated damages assessed and all other information necessary to fully explain the assessment of liquidated damages.

2. In the last five years has your firm, or any firm with which any of your company's owners, officers or partners was associated, been debarred, disqualified, removed or otherwise prevented from bidding on, or completing, any government agency or public works project for any reason?

NOTE: "Associated with" refers to another construction firm in which an owner, partner or officer of your firm held a similar position, and which is listed in response to Part II (A) on this form.

Yes No

If "yes," explain on a separate signed page. State whether the firm involved was the firm applying for pre-qualification here or another firm. Identify by name of the company, the name of the person within your firm who was associated with that company, the year of the event, the owner of the project, the project and the basis for the action.

3. In the last five years has your firm been denied an award of a public works contract based on a finding by a public agency that your company was not a responsible bidder?

Yes No

If "yes," explain on a separate signed page. Identify the year of the event, the owner, the project and the basis for the finding by the public agency.

NOTE: The following two questions refer only to disputes between your firm and the owner of a project. You need not include information about disputes between your firm and a supplier, another contractor, or subcontractor. You need not include information about “pass-through” disputes in which the actual dispute is between a sub-contractor and a project owner. Also, you may omit reference to all disputes about amounts of less than \$50,000.

4. In the past five years has any claim **against** your firm concerning your firm’s work on a construction project been **filed in court or arbitration?**

Yes No

If “yes,” on separate signed sheets of paper identify the claim(s) by providing the project name, date of the claim, name of the claimant, a brief description of the nature of the claim, the court in which the case was filed and a brief description of the status of the claim (pending or, if resolved, a brief description of the resolution).

5. In the past five years has your firm made any claim in court or arbitration against a project owner concerning work on a project or payment for a contract?

Yes No

If “yes,” on separate signed sheets of paper identify the claim by providing the project name, date of the claim, name of the entity (or entities) against whom the claim was filed, a brief description of the nature of the claim, the court in which the case was filed and a brief description of the status of the claim (pending, or if resolved, a brief description of the resolution).

6. At any time during the past five years, has any surety company made any payments on your firm’s behalf as a result of a default, to satisfy any claims made against a performance or payment bond issued on your firm’s behalf, in connection with a construction project, either public or private?

Yes No

If “yes,” explain on a separate signed page the amount of each such claim, the name and telephone number of the claimant, the date of the claim, the grounds for the claim, the present status of the claim, the date of resolution of such claim if resolved, the method by which such was resolved if resolved, the nature of the resolution and the amount, if any, at which the claim was resolved.

7. In the last five years has any insurance carrier, for any form of insurance, refused to renew the insurance policy for your firm?

Yes No

If “yes,” explain on a separate signed page. Name the insurance carrier, the form of insurance and the year of the refusal.

8. In the last five years has your firm held a public works contract on which more than three stop payment notices were served against your firm?

Yes No

If "Yes" explain on a separate signed page.

D. Criminal Matters and Related Civil Suits

1. Has your firm or any of its owners, officers or partners ever been found liable in a civil suit or found guilty in a criminal action for making any false claim or material misrepresentation to any public agency or entity?

Yes No

If "yes," explain on a separate signed page, including identifying who was involved, the name of the public agency, the date of the investigation and the grounds for the finding.

2. Has your firm or any of its owners, officers or partners ever been convicted of a crime involving any federal, state, or local law related to construction?

Yes No

If "yes," explain on a separate signed page, including identifying who was involved, the name of the public agency, the date of the conviction and the grounds for the conviction.

3. Has your firm or any of its owners, officers or partners ever been convicted of a federal or state crime of fraud, theft, or any other act of dishonesty?

Yes No

If "yes," identify on a separate signed page the person or persons convicted, the court (the county if a state court, the district or location of the federal court), the year and the criminal conduct.

E. Bonding

1. Please attach a notarized statement from an admitted surety insurer (approved by the California Department of Insurance and authorized to issue bonds in the State of California) which states your current bonding capacity.

2. Name of bonding company/surety: _____

Name of surety agent, address and telephone number:

3. List all other sureties (name and full address) that have written bonds for your firm during the last five years, including the dates during which each wrote the bonds:

4. If your firm was required to pay a premium of more than one per cent for a performance and payment bond on any project(s) on which your firm worked at any time during the last five years, state the percentage that your firm was required to pay, identify the project, identify the owner, and identify the dates of the project. You may provide an explanation for a percentage rate higher than one per cent, if you wish to do so.

5. During the last five years, has your firm ever been denied bond coverage by a surety company, or has there ever been a period of time when your firm had no surety bond in place during a public construction project when one was required?

Yes No

If “Yes” provide details on a separate signed sheet indicating the date when your firm was denied coverage and the name of the company or companies which denied coverage; and the period during which you had no surety bond in place.

F. Compliance with Occupational Safety and Health Laws and with Other Labor Legislation Safety

1. Has CAL OSHA cited and assessed penalties against your firm for any “serious,” “willful” or “repeat” violations of its safety or health regulations in the past five years?

NOTE: If you have filed an appeal of a citation, and the Occupational Safety and Health Appeals Board has not yet ruled on your appeal, you need not include information about it.

Yes No

If “yes,” attached a separate signed page describing the citations, including information about the dates of the citations, the nature of the violation, the project on which the citation(s) was or were issued, the amount of penalty paid, if any. If the citation was appealed to the Occupational Safety and Health Appeals Board and a decision has been issued, state the case number and the date of the decision.

2. Has the federal Occupational Safety and Health Administration cited and assessed penalties against your firm in the past five years?

NOTE: If you have filed an appeal of a citation and the Appeals Board has not yet ruled on your appeal, or if there is a court appeal pending, you need not include information about the citation.

Yes No

If “yes,” attach a separate signed page describing each citation.

3. Has the EPA or any Air Quality Management District or any Regional Water Quality Control Board cited and assessed penalties against either your firm or the owner of a project on which your firm was the contractor, in the past five years?

NOTE: If you have filed an appeal of a citation and the Appeals Board has not yet ruled on your appeal, or if there is a court appeal pending, you need not include information about the citation.

Yes No

If “yes,” attach a separate signed page describing each citation.

4. How often do you require documented safety meetings to be held for construction employees and field supervisors during the course of a project?

5. List your firm’s Experience Modification Rate (EMR) (California workers’ compensation insurance) for each of the past three premium years:

NOTE: An Experience Modification Rate is issued to your firm annually by your workers’ compensation insurance carrier.

Current year: _____

Previous year: _____

Year prior to previous year: _____

If your EMR for any of these three years is or was 1.00 or higher you may, if you wish, attach a letter of explanation.

6. Within the last five years has there ever been a period when your firm had employees but was without workers’ compensation insurance or state-approved self-insurance?

Yes No

If “yes,” please explain the reason for the absence of workers’ compensation insurance on a separate signed page. If “No,” please provide a statement by your current workers’ compensation

insurance carrier that verifies periods of workers' compensation insurance coverage for the last five years. (If your firm has been in the construction business for less than five years, provide a statement by your workers' compensation insurance carrier verifying continuous workers' compensation insurance coverage for the period that your firm has been in the construction business.)

G. Prevailing Wage and Apprenticeship Compliance Record

1. Has there been any occasion during the last five years in which your firm was required to pay either back wages or penalties for your own firm's failure to comply with the **state's** prevailing wage laws?

NOTE: This question refers only to your own firm's violation of prevailing wage laws, not to violations of the prevailing wage laws by a subcontractor.

Yes No

If "yes," attach a separate signed page or pages, describing the nature of each violation, identifying the name of the project, the date of its completion, the public agency for which it was constructed; the number of employees who were initially underpaid and the amount of back wages and penalties that you were required to pay.

2. During the last five years, has there been any occasion in which your own firm has been penalized or required to pay back wages for failure to comply with the **federal** Davis-Bacon prevailing wage requirements?

Yes No

If "yes," attach a separate signed page or pages describing the nature of the violation, identifying the name of the project, the date of its completion, the public agency for which it was constructed; the number of employees who were initially underpaid, the amount of back wages you were required to pay along with the amount of any penalty paid.

3. Provide the **name, address and telephone number** of the apprenticeship program sponsor(s) (approved by the California Apprenticeship Council) from whom you intend to request the dispatch of apprentices to your company for use on any public work project for which you are awarded a contract.

4. If your firm operates its own State-approved apprenticeship program:

- (a) Identify the craft or crafts in which your firm provided apprenticeship training in the past year.
- (b) State the year in which each such apprenticeship program was approved, and attach evidence of the most recent California Apprenticeship Council approval(s) of your apprenticeship program(s).
- (c) State the number of individuals who were employed by your firm as apprentices at any time during the past three years in each apprenticeship and the number of persons who, during the past three years, completed apprenticeships in each craft while employed by your firm.

5. At any time during the last five years, has your firm been found to have violated any provision of California apprenticeship laws or regulations, or the laws pertaining to use of apprentices on public works?

NOTE: You may omit reference to any incident that occurred prior to January 1, 1998, if the violation was by a subcontractor and your firm, as general contractor on a project, had no knowledge of the subcontractor's violation at the time they occurred.

Yes No

If "yes," provide the date(s) of such findings, and attach copies of the Department's final decision(s).

**PART III.
RECENT CONSTRUCTION
PROJECTS COMPLETED**

1. Contractor shall provide information about all public works projects, subject to DSA approval, completed as the general contractor within the last three (3) years. Names and references must be current and verifiable. Use separate sheets of paper that contain all of the following information:

Project Name: _____

Location: _____

Owner: _____

Owner Contact (name and current phone number):

Architect or Engineer: _____

Architect or Engineer Contact (name and current phone number):

Construction Manager (name and current phone number):

Inspector of Record (name and current phone number):

Description of Project, Scope of Work Performed:

Total Value of Construction (including change orders): _____

Date Construction Commenced: _____

Original Scheduled Completion Date: _____

Time Extensions Granted (number of days): _____

Actual Date of Completion: _____

****For Informational Purposes Only. Do Not Fill Out****

QUALIFICATION QUESTIONNAIRE SCORING

PART I: Essential Requirements for Qualification

Contractor must answer “Yes” to questions 1 through 6 below. Any “No” (or blank) answers shall result in disqualification.

		Yes	No
1.	Valid and current contractor’s license		
2.	Liability Insurance with Appropriate Limits General Contractor: \$2,000,000 & \$4,000,000		
3.	Meets “skilled workforce” requirements		
4.	Valid worker’s compensation insurance policy		
5.	At least 2 DSA-approved CA public school K-12 projects of \$1 million + w/in 3 years		
6.	Currently registered with DIR		

Contractor must answer “No” to questions 7 through 10 below. Any Yes (or blank) answers shall result in disqualification.

7.	Contractor’s License Revocation or Suspension within last 5 Years		
8.	Surety completed a project due to contractor default		
9.	Contractor ineligible to bid due to Labor Code violations		
10.	Convicted of a crime involving construction laws		

Part II: Organization, History, Organizational Performance, Compliance with Civil and Criminal Laws

Section A. Current Organization and Structure of the Business

Information provided in this section must be complete and to the District’s satisfaction. Failure to provide all requested information shall result in disqualification. This Section is not scored.

Section B. History of the Business and Organizational Performance

		Possible Scores	Score
1.	Years in business under same name/license	6 years or more = 5 5 years = 4 4 years = 3 3 years or less = 2	
2.	Debtor in a bankruptcy case	No =5 Yes =0	
3.	Bankruptcy last 5 years	No = 5 Yes = 0	
4.	Suspended license last 5 years	No = 5 Yes = 0	
5.	Local Admin Office	Yes = 5 No = 0	
6.	Local project experience	Yes = 5 No = 0	

(Maximum Possible Score 30)

II.B Total Score _____

Section C. Disputes

		Possible Scores	Score
1.	Liquidated Damages in last 5 years	No = 5 1 or 2 times = 3 2 times or more = 0	
2.	Debarred, Disqualified, removed or prevented from bidding in last 5 years	No = 5 Yes = 0	
3.	Denied bid on grounds of non-responsibility	No = 5 Yes = 0	

4.	Claim against firm in court or arbitration	No = 5 1-2 instances = 3 More than 2 = 0	
5.	Made claim against owner in court or arbitration	No = 5 1 instance = 3 More than 2 = 0	

6.	Surety payments on contractor's behalf	No = 5 1 instance = 3 More than 1 = subtract 5	
7.	Insurance carrier refused to renew insurance policy	No = 5 Yes = 0	
8.	Project with more than 3 stop payment notices in last 5 years	No = 5 Yes = 0	

(Maximum Possible Score 40)

II.C Total Score _____

Section D. Criminal Matters and Related Civil Suits

		Possible Scores	Score
1.	Liable or convicted of crime or civil suit involving false claim	No = 5 Yes = subtract 5	
2.	Convicted of crime involving construction law	No = 5 Yes = subtract 5	
3.	Convicted of a crime involving fraud, dishonesty, etc.	No = 5 Yes = subtract 5	

(Maximum Possible Score 15)

II.D Total Score _____

Section E. Bonding

**Questions 1-3: Information provided in these questions must be complete to the District's satisfaction. Failure to provide all requested information shall result in disqualification. These three questions are not scored.

		Possible Scores	Score
4.	Required to pay a premium	No = 5 1-1.25% premium = 4 1.25-1.5% premium = 3 More than 1.5% = 0	
5.	Denied coverage by surety	No = 5 Yes = 0	

(Maximum Possible Score 10)

II.E Total Score _____

Section F. Compliance with OSHA and Other Labor Legislation Safety

		Possible Scores	Score
1.	CAL OSHA violations last 5 years	No = 5 1 instance = 4 2 instances = 3 3+ instances = 0	
2.	Federal OSHA citations last 5 years	No = 5 1 instance = 4 2 instances = 3 3+ instances = 0	
3.	EPA, Air Quality or RWQCB citations last 5 years	No = 5 1 instance = 4 2 instances = 3 3+ instances = 0	
4.	Safety meetings	Weekly = 5 Monthly = 3 Quarterly = 1 None = 0	
5.	Experience Modification Rate	EMR .95 or less = 5 .95 – 1 = 3 Other = 0	
6.	Workers' comp lapse in last five years	No = 5 Yes = 0	

(Maximum Possible Score 30)

II.F Total Score _____

Section G. Prevailing Wage and Apprenticeship Compliance Record

**Questions 3 & 4: Information provided in these questions must be complete to the District's satisfaction. Failure to provide all requested information shall result in disqualification. These two questions are not scored.

		Possible Scores	Score
1.	Required to pay back wages under State prevailing wage law	No = 5 1 instance = 4 2 instances = 3 3+ instances = 0	
2.	Required to pay back wages under Federal prevailing wage law	No = 5 1 instance = 4 2 instances = 3 3+ instances = 0	
5.	Apprentice violations	None = 5 1 instance = 4 2 instances = 3 3+ instances = 0	

(Maximum Possible Score 15)

II.G Total Score _____

TOTAL SCORE

II.A Total Score [Pass/Fail] _____

II.B Total Score _____

II.C Total Score _____

II.D Total Score _____

II.E Total Score _____

II.F Total Score _____

II.G Total Score _____

Grand Total _____

(Maximum Possible Grand Total = 140)

PRICE PROPOSAL

1. Receipt of Addenda

Receipt of the following addenda is hereby acknowledged:

Addendum # _____ Dated: _____ Addendum # _____ Dated: _____

Addendum # _____ Dated: _____ Addendum # _____ Dated: _____

2. Contractor's Fee Percentage Proposal for the Project:

- Fee Percentage for Construction and Post Construction Services:
_____ %

WORKERS' COMPENSATION CERTIFICATE

Labor Code §3700 in relevant part provides:

"Every employer except the State shall secure the payment of compensation in one or more of the following ways:

- (a) By being insured against liability to pay compensation in one or more insurers duly authorized to write compensation insurance in this State.

- (b) By securing from the Director of Industrial Relations a certificate of consent to self-insure, which may be given upon furnishing proof satisfactory to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to his employees."

I am aware of the provisions of §3700 of the Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that Code, and I will comply with such provisions before commencing the performance of the work of this Contract and will require all Subcontractors to do the same.

Contractor

By: _____

In accordance with Article 5 (commencing at §1860), Chapter 1, Part 7, Division 2 of the Labor Code, the above certificate must be signed and filed with the awarding body prior to performing any work under this Contract.

**CRIMINAL BACKGROUND INVESTIGATION / FINGERPRINTING
CERTIFICATION**

This Certification pertains to the _____ (“Project”) between the _____ (the "District" or the "Owner") and _____ (the "Contractor").

The undersigned does hereby certify to the Governing Board of the District that (1) he/she is a representative of the Contractor, (2) he/she has personal knowledge regarding the facts herein certified, (3) he/she is authorized and qualified to execute this certificate on behalf of Contractor; and (4) that the following is true and correct:

1. Education Code. Contractor has taken at least one of the following actions with respect to the Project (check all that apply):

_____ The Contractor has complied with the fingerprinting requirements of Education Code section 45125.1 with respect to all of Contractor's employees and all of its subcontractors' employees who may have contact with District pupils in the course of providing services pursuant to the Contract, and the California Department of Justice has determined that none of those employees has been convicted of a felony, as that term is defined in Education Code section 45122.1. A complete and accurate list of Contractor's employees and of all of its subcontractors' employees who may come in contact with District pupils during the course and scope of the Contract is attached hereto; and/or

_____ Pursuant to Education Code section 45125.2, the Contractor has installed or will install, prior to commencement of any work, a physical barrier at the Project site, as approved in writing by the District, that will limit contact between Contractor's and subcontractors' employees and District pupils at all times; and/or

_____ Pursuant to Education Code section 45125.2, the Contractor certifies that all Contractor and subcontractor employees will be under the continual supervision of, and monitored by, an employee of the Contractor who the California Department of Justice has ascertained has not been convicted of a violent or serious felony. The name and title of the employee who will be supervising Contractor's employees and its subcontractors' employees is:

Name:

Title:

_____ The Work on the Contract is at an unoccupied school site and no Contractor employee and/or subcontractor employee or supplier of any tier of Contract shall come in contact with the District pupils.

2. Megan's Law (Sex Offenders). I have verified and will continue to verify that the employees of Contractor and any subcontractor who will be on the Project site and the employees of the Subcontractor(s) that will be on the Project site are **not** listed on California's "Megan's Law" Website (<http://www.meganslaw.ca.gov/>).

Note: The Contractor's responsibility for background clearance extends to all of its employees, subcontractors, and employees of subcontractors coming into contact with District pupils regardless of whether they are designated as employees, subcontractors or acting as independent contractors of the Contractor.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date: _____
Name of Contactor: _____
Signature: _____
Print Name: _____

INTERVIEW PORTION

Reference Interviews

The following questions will be used to interview selected contacts listed in the Qualification Questionnaire from at least two completed similar type projects for each Contractor. District will conduct the interviews. No action on the Contractor's part is necessary. These questions are included in the package given to the Contractor for information only.

In each interview question, the person being interviewed is asked to rate a certain aspect of the Contractor's performance, using a scale of 1 to 10. The highest possible score is 130 points for each interview; 260 points total for both interviews. A score of between 91 and 110 on one interview indicates the District should conduct another interview to collect additional information. If an additional interview is required, the District shall take the highest two interview scores to determine the best value score. Contractors will be ranked based on their combined interview scores.

Interview Questions

First, please give a brief description of the project.

1. Are there any outstanding stop notices, liens, or claims currently unresolved on contracts for which notices of completion were recorded more than 120 days ago? (If answer is "No" = 10 points; 1 point for each is deducted from overall score)
2. On a scale of 1-10, with 10 being the best, did the contractor provide adequate personnel? (Max. 10 points)
3. On a scale of 1-10, with 10 being the best, did the contractor provide adequate supervision? (Max. 10 points)
4. On a scale of 1-10, with 10 being the best, was there adequate equipment provided on the job? (Max. 10 points)
5. On a scale of 1-10, with 10 being the best, was the contractor timely in providing reports and other paperwork, including change order paperwork and scheduling updates? (Max. 10 points)
6. On a scale of 1-10, with 10 being the best, did the contractor adhere to the project schedule that your [agency] [business] approved? (Max. 10 points)
7. Was the project completed on time? (10 points if the answer is "Yes").

Or, if the answer is "no," on a scale of 1-10, with 10 being the best, to what extent was the contractor responsible for the delay in completion?

8. On a scale of 1-10, with 10 being the best, rate the contractor on the timely submission of reasonable cost and time estimates to perform change order work. (Max. 10 points)

9. On a scale of 1-10, with 10 being the best, rate the contractor on how well the contractor performed the work after a change order was issued, and how well the contractor integrated the change order work into the existing work. (Max. 10 points).
10. On a scale of 1-10, with 10 being the best, rate how well the contractor performed in the areas of turning in Operation & Maintenance manuals, completing as-built drawings, providing required training and taking care of warranty items? (Max. 10 points)
11. On a scale of 1-10, with 10 being the best, rate the contractor on whether there were an unusually high number of claims, given the nature of the project, or unusual difficulty in resolving them. (Max. 10 points)
12. On a scale of 1-10, with 10 being the highest, rate the contractor with respect to timely payments by the contractor to either subcontractors or suppliers. (If the person being interviewed knows of no such difficulties, the score on this question should be “10.”)
13. On a scale of 1-10, with 10 being the best, how would you rate the quality of the work overall? (Max. 10 points)

Contractor Interviews

Each Contractor will be asked the following identical set of questions. The questions will be scored based on the enclosed Interview Scoring Matrix. The highest possible score is 400 points for the interview. Contractors will be ranked based on their overall interview score.

1. What staff from your firm will be on site daily? In other words, what levels of staff will be on site? Superintendent? Project Engineer? Project Manager etc.?
2. Please discuss your current workload and schedules, and describe how you intend to complete this work given your current workload.
3. Can you share how your firm handles document control and the processing of all the project documentation, such as RFI's, RFP's, etc.?
4. Describe your experience with similar type projects? How have you delivered these projects on time?
5. Can you provide us with examples of other projects you have completed using the lease-leaseback method? Do you currently have any projects that are currently complete but in the lease phase?
6. How do you evaluate your subcontractors to ensure you are selecting a quality sub?
7. Has your firm completed at least one public works project within the county which the project is located in the last five years? If not, how would you go about mobilizing a project in this area?
8. Do you have any questions for the committee?

Interview Scoring Matrix

	Contractor:				
	Unsatisfactory	Below Average	Average	Above Average	Excellent
1. Staffing	0	10	15	20	25
2a. Workload and Scheduling	0	10	15	20	25
2b. Project management of current workload	0	10	15	20	25
3a. Paperwork Processing	0	10	15	20	25
3b. Document Control	0	10	15	20	25
4a. Experience with similar projects	0	10	15	20	25
4b. Delivery of projects on time	0	10	15	20	25
5. Lease-leaseback experience	0	10	15	20	25
6. Subcontractor relationships	0	10	15	20	25
7. Local experience	0	10	15	20	25
	Total Score per interview questions:				
					(250 max. score possible)
Overall Assessment based on the interview:					
	Unsatisfactory	Average	Above Average		
Assessment of Project Team, including qualifications, experience	0	25	50		
Experience with Similar Projects; owner evaluation, quality and budget control	0	25	50		
Project Management, including planning, coordination, scheduling, cost control, local experience, capabilities and techniques	0	25	50		
	Total:				
				(150 max. score possible)	
Contractors score	Max score possible:	400			

**** For Informational Purposes Only. Do Not Fill Out****

Ranking of Best Value Scores

SECTION I – CONTRACTOR QUALIFICATIONS

In the follow table, enter all proposing Contractors and the total points received from the qualifications evaluation (*Refer to Qualification Questionnaire*) (Maximum points available is 140).

CONTRACTOR	POINTS AWARDED

SECTION II – FEE PERCENTAGE PROPOSALS

In the following table, enter all proposing Contractors based on their fee percentage proposal for the Project in order from lowest to highest. In the event two Contractors submit the same price proposal, both Contractors shall be awarded the same amount of points. (Maximum points available is 100).

Construction and Post Construction Services – Fee Percentage

CONTRACTOR	PRICE PROPOSAL	POINTS AWARDED
		100
		90
		80
		70
		60
		50
		40
		30
		20
		10

SECTION III – INTERVIEW PORTION

Reference Interviews (Maximum 260 points per Contractor)

CONTRACTOR	POINTS AWARDED

Contractor Interviews (Maximum 400 points per Contractor)

CONTRACTOR	POINTS AWARDED

PART IV - BEST VALUE SCORE

In the following table, enter all proposing Contractors, their scores from the qualifications, price proposal evaluations, interviews, and their total combined score. The total combined score is the Contractor’s “best value score.”

CONTRACTOR	SECTION I POINT TOTAL	SECTION II POINT TOTAL	SECTION III POINT TOTAL	SECTION I, II & SECTION III COMBINED TOTAL

SECTION V – BEST VALUE RANK

In the following table, enter all proposing Contractors and best value score in order from the highest best value score to the lowest best value score. The Contractor with the highest best value score shall be ranked No. 1 overall.

CONTRACTOR	BEST VALUE SCORE (highest to lowest)	RANK
		1
		2
		3
		4
		5
		6
		7
		8
		9
		10