Mooresville Graded School District

REQUEST FOR
Qualification
For
MGSD Renovation/Addition
Design-Build Team

Mooresville Graded School District 305 North Main Street Mooresville, NC 28115

Proposal Process, Questions/Inquiries, and RFQ Submission:

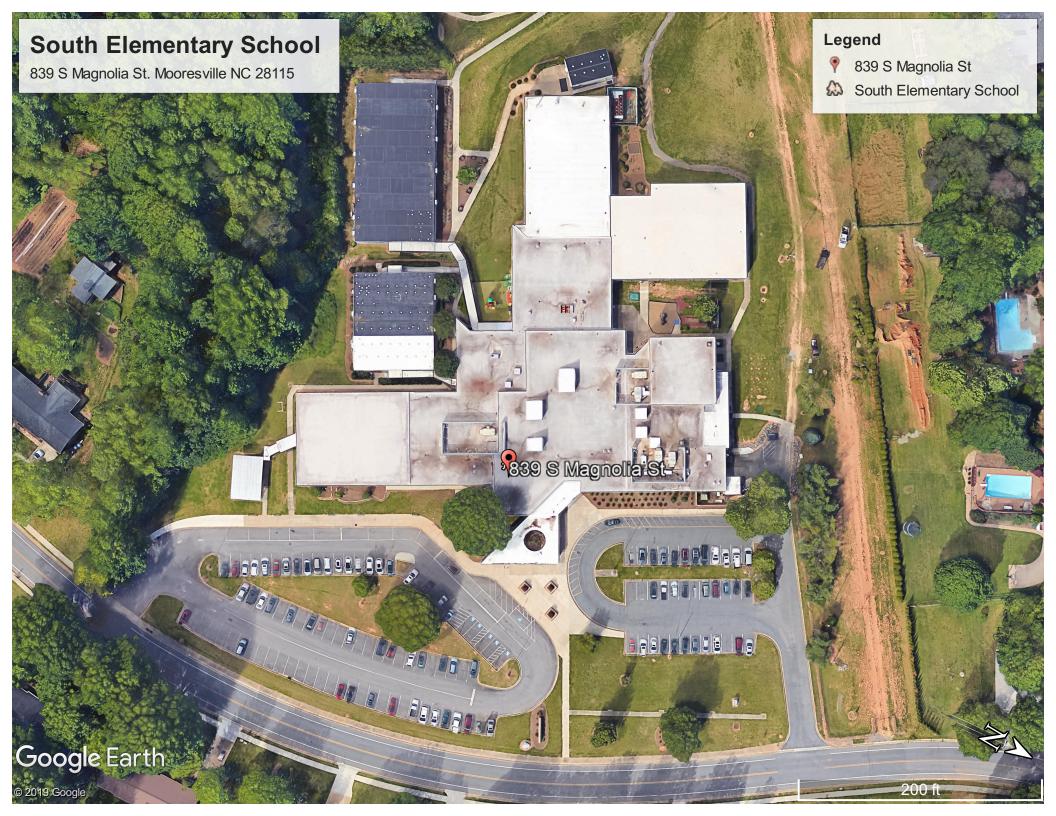
Terry Haas Chief Financial Officer Phone: (704) 658-2540

E-mail: Terry Haas thaas@mgsd.k12.nc.us

| Table of (| Contents | 2 |
|----------------------|--|---------|
| Preliminary | Site Plan | 3 |
| SECTION 1 | DESCRIPTION OF PROJECT AND SCOPE | |
| 1.1 | Contract Characteristics. | |
| 1.2 | Guiding Principles | |
| 1.3 | Challenges | |
| 1.4 | Partnership | |
| 1.5 | Identification of Project Office | |
| 1.6 | Project Description | |
| 1.7 | Project Milestones | |
| SECTION 2 | REQUEST FOR QUALIFICATIONS (RFQ) | |
| 2.1 | Pre-Submission Inquiries. | |
| 2.2 | Date, Time & Place of Submission | |
| 2.3 | Submission Format | |
| | 2.3.1 Written Submission | |
| | 2.3.2 Electronic Submission | |
| 2.4 | Proprietary Information | |
| 2.5 | Submission Requirements | |
| | 2.5.1 Past Performance | |
| | 2.5.1.1 Project Master List. | |
| | 2.5.1.2 Relevant Project Summaries | |
| | 2.5.1.4 Litigation | |
| | 2.5.1.5 Safety Record | |
| | 2.5.2 Design Builder Capacity | |
| | 2.5.2.1 Bonding Capacity | |
| | 2.5.2.2 Insurance | |
| | 2.5.2.3 Relevant Projects | |
| | 2.5.3 Management Approach | |
| 2.6 | Evaluation | |
| | 2.6.1 Evaluation Factors | 10 |
| | 2.6.2 Factor Descriptions and Evaluation Criteria | 10 |
| | 2.6.2.1 Past Performance | |
| | 2.6.2.1.1 Relevance | 11 |
| | 2.6.2.1.2 Quality | 11 |
| 2.7 | Special Notice to Firms | 11 |
| CECTION 2 | OVEDVIEW OF SELECTION DDOCESS & SCODING O | DITEDIA |
| SECTION 3 3.1 | OVERVIEW OF SELECTION PROCESS & SCORING O Overview of Firm Selection Process | |
| 3.1 | Scoring Criteria | |
| 3.4 | Scoring Criteria | 12 |
| | MINORITY AND FEMALE-OWNED AND SMALL BUSI | |
| 4.0 | Policy Statement and Minority Participation Goal | 13 |

Attachment: Past Performance Questionaire





SECTION 1. DESCRIPTION OF PROJECT AND SCOPE

1.1 Contract Characteristics. Mooresville Graded School District, herein referred to as MGSD, intends to award a Design-Build contract for this Project. Selection of the Design-Build Team is by means of a qualifications-based selection process. The ability of the Design-Builder to deliver the Project on time, on budget, within the criteria and constraints identified in this RFQ, and pursuant to the requirements of Section 143-128.1A of the North Carolina General Statutes, so as to furnish the "best value" to MGSD, will determine the ranking for, and selection of, the Design-Builder for the contract.

All Design-Builders responding to this Request for Qualifications who satisfy the stated criteria shall be evaluated by MGSD according to the weighting schedule identified in this Request for Qualifications. The three most highly-qualified Design-Builders will be ranked, and MGSD will begin negotiations with the highest-ranked Design-Builder.

- **1.2 Guiding Principles.** The overarching goal for this Project is to design and build the Mooresville Renovation/Addition at Park View & South Elementary Schools. MGSD seeks to work in an effective partnering relationship with the successful Design-Builder to accomplish this goal.
- **1.3 Challenges.** The successful Design-Builder Team will need creative solutions to address the following significant challenges:
 - Managing the fixed budget to achieve acceptable levels of quality while providing all program spaces noted in the Owner's Criteria, in the completed project.
 - Scheduling construction activities and site traffic so as not to create hazardous conditions for students, staff or local residents.
 - Designing and delivering a school facility that provides an optimal learning environment for students and an energy efficiency level high enough to be Energy Star certified by the EPA.
 - Assuring that materials selected for the design will satisfy the intended use of the end-users and be of good quality.
 - Collaborating with the MGSD staff to best determine the facility layout and functionality to most effectively achieve the programming needs of the school.
 - Managing and monitoring the job progress throughout the design and construction phases to meet MGSD timelines.
- **1.4 Partnership.** The degree of success of this project will depend largely upon the nature of the relationship between the Design-Builder and MGSD. The MGSD's intent is to work with the Design-Builder as an integrated team with common goals of improving quality, improving productivity, achieving cost savings, and achieving other economies and efficiencies across the full spectrum of performance. The MGSD will provide the Design-Builder maximum flexibility to determine specific work methods that satisfy the performance-based requirements in the contract. MGSD expects the Design-Builder to take customer preferences into consideration, participate with the MGSD in continuous improvement activities (such as optimizing the phasing of the effort), and proactively address risks and challenges to the Project's success. MGSD will endeavor to work with the Design-Builder to implement processes, as are appropriate, for this Design-Build Project that maximize efficiency and provide the MGSD insight into Project progress without an undue level of Owner oversight.
- **1.5 Identification of the Project Office.** MGSD issues this Request for Qualifications (RFQ) soliciting qualifications from those Design/Builder teams interested in designing and constructing the MGSD Renovation/Addition at Park View & South Elementary Schools.

At 305 North Main Street Mooresville, NC 28115. The RFQ can be requested from Terry Haas, Chief Financial Officer (704) 658-2540 or theas@mgsd.k12.nc.us. It can also be picked up at the Central Administration Office located at 305 North Main Street; Mooresville, NC 28115. The design and construction services described herein are being procured pursuant to Section 143-128.1A of the North Carolina General Statutes.

All questions and correspondence in conjunction with this solicitation is to be made in writing and should be directed to the MGSD contact identified below. Contact with any other MGSD Personnel should not be made and could result in rejection of any related submission.

Proposal Process Questions/Inquiries, and RFQ Submission:

Terry Haas

Chief Financial Officer Phone: (704) 658-2540

E-mail: Terry Haas thaas@mgsd.k12.nc.us

1.6 Project Description. MGSD will select the three most-highly qualified Design-Builder respondents, and will open negotiations with the most-highly qualified Design-Builder, for the contract for delivery of the Project. The Project will include the addition of approximately 26,500 square feet as a gymtorium along with renovations and updates to the existing HVAC at both sites. It will also include updates to the cafeteria and dining space as well as restructuring parking and playgrounds. We anticipate a total project budget of \$13,500,000. This includes the cost of site work, construction, all design and contractor fees. MGSD will procure loose furniture and technology through separate funds in coordination with the Design-Builder. We anticipate project completion by Summer 2021. The project addresses are: Park View Elementary 217 W. McNeely Avenue, Mooresville, NC 28115; South Elementary 839 S. Magnolia Street, Mooresville, NC 28115

The Design-Builder's scope of work will include:

- Pre-construction project planning including assistance in the preparation of a schedule, preliminary cost estimate and value engineering measures. Make submissions to all regulatory agencies and obtain permits.
- Prepare site, architectural, structural, mechanical, plumbing and electrical design plans based on the MGSD Criteria documents.
- Site Design: demolition and clearing plans, grading and drainage plans, sedimentation and erosion control plans, layout and staking plans, elevations and sections, construction details, lighting and signage, landscape and planting plans and details.
- Building Design: building plan configuration and elevation elements including exterior building skin
 materials and colors, foundation, structural and roof systems, building fenestration and openings, overall
 dimensions, materials testing requirements, Mechanical/Electrical/Plumbing design including systems,
 equipment and calculations, energy and performance modeling, systems review, coordination and
 integration to include all utilities and controls.
- Development and refinement of cost estimates and project schedules.
- Collaborating with the MGSD staff to best determine the facility layout and functionality to most effectively achieve the programming needs of the school.
- Energy Efficiency & Learning Environments: Designing and delivering a school facility that provides an optimal learning environment for students and an energy efficiency level high enough to be Energy Star certified by the EPA.
- Construction administration and observation including daily site construction management, safety inspections, daily contractor coordination meetings and weekly progress meetings with the Owner.

• Project closeout, establishment of warranties, guarantees and owner's manuals.

1.7 Project Milestones

- Issue RFQ: <u>January 30, 2020</u>
- Advertise RFQ: <u>January 30 February 7, 2020</u>
- Deadline for written questions and clarifications on RFQ: February 19, 2020
- Deadline for submission of Statement of Qualifications: March 12, 2020
- Owner completes qualification evaluation to establish a shortlist of firms remaining. Owner notifies shortlisted firms and schedules interviews (if required.): On or after March 17, 2020
- Complete interviews of short-listed firms: March 19-20, 2020
- Notify selected Design-Build firm, begin contract negotiations: March 24, 2020
- School Board award of contract: April 14, 2020
- Notice to Proceed: To be Determined
- Project Completion: To be Determined

SECTION 2. REQUEST FOR QUALIFICATIONS (RFQ)

- **2.1 Pre-Submission Inquiries.** Submit written inquiries, questions or comments by email to the individual listed in Section 1 of this document. All requests for information or clarification must be submitted by the date listed in Section 1. Unless the question deals with issues of a proprietary nature, responses to questions or comments will be answered by MGSD addendum and emailed, hard copies will not be issued. Regardless, it is each potential respondent's sole responsibility to ensure they acquire any addenda issued or questions answered.
- **2.2 Date, Time & Place of Submission.** Qualifications must be received at the office of MGSD Project Contact, identified in Section 1.7, **by 4:00 PM on March 12, 2020**. The MGSD Project office will date and time stamp each submission, late submissions will not be accepted. All submitted materials will become the property of MGSD and will not be returned.

Regardless of the manner you choose to deliver your package, it is the Design-Builder's responsibility to make sure it is received before the submission deadline.

2.3 Submission Format. Proposals shall conform to the instructions in this section; deviation may result in the possible exclusion of such proposals from further consideration, in the sole discretion of MGSD. Packages received after the deadline will not be considered.

2.3.1 Written Submission

- a. <u>Number of Copies</u>: Firms shall submit ONE (1) original of their qualifications submission as described herein.
- b. <u>Text</u>: Text shall be at least single-spaced, on 8½x11-inch paper, with a minimum one-inch margin all around. Pages shall be numbered consecutively. A page printed on both sides shall be counted as two pages. Submission as double-sided printing/copying on recycled paper is encouraged. No foldout pages shall be used. Pages submitted in excess of any page limitations stated throughout this document may not be evaluated.
- c. <u>Font Size</u>: Print shall be of a minimum 12-point font size or a maximum 10 characters per inch (10-pitch, pica) spacing. Bolding, underlining, and italics may be used to identify topic demarcations or points of emphasis. Graphic presentations, including tables, while not subject to the same font size and spacing requirements, shall have spacing and text that is easily readable.
- d. Binding: Original should be submitted in an economical, three-ring binder.
- **2.3.2 Electronic Submission. In addition** to the original as identified above, the Design-Builder shall include a complete copy of the original proposal information in electronic format (USB flash drive, CD, or DVD). Text and graphics portions of the electronic copies shall be in **PDF format.**
- **2.4 PROPRIETARY INFORMATION:** Trade secrets or similar proprietary data which the Design-Builder does not wish disclosed to other than personnel involved in the evaluation or contract administration will be kept confidential to the extent permitted by G.S. 132-1.3 if identified as follows: Each page shall be identified in boldface at the top and bottom as "CONFIDENTIAL". Any section of the proposal which is to remain confidential shall also be so marked in boldface on the title page of that section. Cost information may not be deemed confidential. In spite of what is labeled as confidential, the determination as to whether or not it is shall be determined by North Carolina Law. Design-Builder shall indemnify and hold harmless the Mooresville Graded School District Board of Education for any costs and expenses associated with the failure to release or disclose any portion of Design-Builder's response that is labeled "CONFIDENTIAL" to a third party.

2.5 Submission Requirements. The following information shall be submitted as part of this RFQ:

| Tab | Description | RFQ Reference | Max. Page Limit | |
|---------------------|------------------------------------|---------------|------------------------|--|
| Past Performance | | | | |
| A | Project Master List | 2.5.1.1 | No limit | |
| В | Relevant Project Summaries | 2.5.1.2 | 2 pages/project | |
| С | Past Performance Customer Feedback | 2.5.1.3 | 1/ea. Relevant Project | |
| Management Approach | | | | |
| A | Organizational Structure | 2.5.3 A | 2 pages | |
| В | Capacity to Perform | 2.5.2 | 2 pages | |

2.5.1 Past Performance

2.5.1.1 Project Master List. Design-Builders shall submit a list of projects involving similar projects, in terms of use, scope, and size, which are either ongoing or completed by the Design-Builder and, if the design is being performed by an outside firm, the architect/engineer team within the last 15 years. Firms may limit the Project Master List to those projects performed by the company division/business segment responding to this RFQ and proposing to perform the prospective contract. There is no page limit for the Project Master List.

Provide the following information for each project listed:

- Date completed
- Location of project
- Total construction cost
- Name of Design-Builder, Architect, and Engineers
- Type of project delivery method used
- General description of building's use, special attributes, unique features, energy certifications, building/design awards, etc.

2.5.1.2 Relevant Project Summaries.

- **2.5.1.2.1** Each Design-Builder shall complete and submit summaries, as described below, for its 10 most "Relevant Projects" from the Master Project List.
- **2.5.1.2.2** "Relevant" projects are defined as those K-12 school design-build projects completed by the Design-Builder within the last 15 years with similar or greater levels of scope, size, and complexity to the MGSD Project.
- **2.5.1.2.3** For all Relevant Projects selected, firms shall summarize the following information in addition to the information requested above:
- Describe the relevance to the MGSD Project. This should expand upon information provided in the Master Project List.
- Describe the project team composition (design/construction firms involved).
- Describe the cost and schedule performance including explanations for any cost and/or time growth experienced.
- Include the project's safety record (i.e., number of lost time accidents).
- Describe the owner's goals regarding minority, woman-owned, and small business participation in the project and the Design Builder's success in meeting any such goals.
- If sustainable design principles were incorporated into the project, indicate the certification level and success achieved, and a projection as whether long term energy/cost savings justified the additional initial cost for implementing these features.
- **2.5.1.3 Past Performance Customer Feedback.** The Design-Builder shall provide any written customer feedback related to the Design-Builder's past performance and customer satisfaction from the 10 selected Relevant Projects. Provide the contact name, title, and contact information for each customer who offered feedback so that MGSD can verify the feedback and gain additional insight into the Design-Builder's performance.
- **2.5.1.4 Litigation.** The Design-Builder shall list all K-12 Schools with whom they have had litigation on any of their past projects, the reason for the litigation and how that litigation was resolved.

2.5.1.5 Safety Record. Safety of students, staff, and the public is critically important on this project. The Design-Builder shall include a description of their safety plan along with their safety ratings including their EMR, REC, LTA, and DART.

2.5.2 Design-Builder Capacity

- **2.5.2.1 Bonding Capacity.** The Design-Builder shall provide a letter of bondability from their bonding company stating both their single project and total capacity to demonstrate the Design-Builder has the ability to bond the project and to provide indication of the Design-Builder's capacity and past performance.
- **2.5.2.2 Insurance.** The Design-Builder must document existing insurance coverage in the following minimum amounts and not less than North Carolina's statutory requirements. Coverage must be from established insurance carriers with AM Best Rating of at least B++ (Good). The coverage must be free from any exclusion related to the Design-Build delivery method. It will be a condition of the Design-Build Contract that the Design-Builder must keep the coverage in place for at least three (3) years after the Date of Substantial Completion. If the Design-Builder is currently carrying coverage less than the specified amounts, a letter from the Design-Builder's insurance carrier affirming the Design-Builder's ability to obtain the required coverage, along with a statement by the Design-Builder of its willingness to obtain the required coverage will also meet the documentation requirements of the RFQ.

Provide Certificates of Insurance, as outlined in Part 4 of the Qualification Questionnaire for Design-Build Services that document the following minimum insurance coverages.

#2 000 000

Worker's Compensation and Liability Insurance

| Employer's Liability: Bodily Injury by Accident | \$500,000 each accident | | |
|---|----------------------------|--|--|
| Employer's Liability: Bodily Injury by Disease | \$500,000 policy limit | | |
| Employer's Liability: Bodily Injury by Disease | \$500,000 each employee | | |

Commercial General Liability Insurance (Occurrence Based)

| General Aggregate Limit (per job): Other than products/completed operations | \$2,000,000 | | |
|--|-------------|--|--|
| Products / Completed Operations: | \$1,000,000 | | |
| Personal & Advertising Injury Limit: | \$1,000,000 | | |
| Each Occurrence Limit: | \$1,000,000 | | |
| Fire Damage (any one fire): | \$50,000 | | |
| Medical Expenses (any one person): | \$5,000 | | |

Professional Services Liability Insurance (Errors + Omissions)

Per Claim: \$2,000,000

Minimum 3-year extended reporting or continuation of coverage for 3 years following Date of Final Completion.

Comprehensive Auto Liability Insurance

Single Limit – each accident: \$1,000,000

Owner, Hired & Non-Owned Bodily Injury & Property Damage

Umbrella Excess Liability Insurance

Each Occurrence & Aggregate: \$10,000,000

Must provide umbrella coverage for all forms of insurance listed above.

2.5.3 Management Approach

- A. Organizational Structure: Each Design-Builder shall describe their organizational structure, and reasoning for their choice. List the benefits/advantages for its structure as well as any shortfalls. Describe if the team's proposed organizational structure for MGSD's project follow the same model as that which has been utilized in past projects.
- B. Capacity to Perform: Describe how the proposed management structure will perform to best realize a successful end project. Describe the expertise and capabilities of team members and their contributions to the Design-Build team.
- C. Explanation of its project team selection, which shall consist of either of the following:
 - a. A list of the licensed contractors, licensed subcontractors, and licensed design professionals whom the design-builder proposes to use for the project's design and construction.
 - b. An outline of the strategy the design-builder plans to use for open contractor and subcontractor selection based upon the provisions of Article 8 of Chapter 143 of the General Statutes.

2.6 Evaluation

2.6.1 Evaluation Factors. All submissions will be evaluated on criteria including, but not limited to, financial stability, past performance on and experience with relevant projects (in terms of design, construction, and design-build experience), ability to control construction costs, time schedules, project observation and management, and commitment to achieve participation of minority, women-owned, and small business entities through the good faith efforts required under Chapter 143 of the North Carolina General Statutes. The weighting for these criteria is as detailed in section 3.2.

2.6.2 Factor Descriptions and Evaluation Criteria

2.6.2.1 Past Performance.

Past performance will be evaluated as a measure of MGSD's confidence in the Design-Builder's ability to successfully perform this project based on demonstrated relevant and recent performance. In evaluating Past Performance, evaluators will assess the:

- Relevance of the past performance
- Demonstrated quality of the past performance
- Satisfaction level of clients
- Degree projects were kept within budget and met deadlines
- Degree litigation was avoided among parties

The Design-Builder's past performance will be evaluated based on the information received as part of the Master Project List, Relevant Projects List, Past Performance Customer Feedback, and phone interviews with identified customers. The projects identified by the Design-Builder in the Relevant Project Summaries may not serve as the sole basis of evaluation of past performance. MGSD reserves the right to obtain and utilize information obtained by the MGSD from sources other than those identified by the Design-Builder.

2.6.2.1.1 Relevance. MGSD will evaluate the projects identified by the Design-Builder in the Relevant Project Summaries (and other information obtained by MGSD to assess the relevance of each project). In addition to the level of size and complexity, evaluators will consider the extent to which the Design-Builder is structuring this project similarly to their past projects.

Evaluators will assign one of the following Relevance ratings to each project evaluated. Projects with Highly Relevant scores will be given more consideration in the evaluation of the quality of the Design-Builder's past performance than projects with lower relevance scores.

2.6.2.1.2 Quality. In assessing the quality of the Design-Builder's past performance, evaluators will consider the Design-Builder's demonstrated ability to meet project quality and schedule requirements, effectively manage resources, meet performance requirements and cost objectives, and ensure customer satisfaction.

Adverse past performance information obtained will be presented to the affected Design-Builder and that Design-Builder will have an opportunity to respond with any mitigating facts. A Design-Builder with limited or no recent or relevant past performance will receive a rating of Neutral/Unknown Confidence, and will not be rated favorably or unfavorably on past performance.

2.7 Special Notice to Firms. Firms are advised that MGSD may utilize other contracted consultants or firms to assist during the source selection. The exclusive responsibility for source selection will reside with MGSD. These companies are bound contractually by Organizational Conflict of Interest and disclosure clauses with respect to proprietary information. Contractor personnel assisting in the proposal evaluation will take all necessary action to preclude unauthorized use or disclosure of a Design-Builder's proprietary data.

SECTION 3: OVERVIEW OF SELECTION PROCESS AND SCORING CRITERIA

3.1 Overview of the Design-Builder Selection Process

3.1.1 Selection Criteria

The Design-Builder will be selected using (i) a qualifications-based selection process during the Request for Qualifications (RFQ) stage to develop a short list and (ii) a negotiations process pursuant to Article 3D of Chapter 143 of the North Carolina General Statutes for the final Design-Builder selection. The qualifications based scoring criteria is included in this document.

3.1.2 Short List

Each firm responding to this RFQ will be evaluated and selected based on its qualifications and the qualifications and experience of the particular individuals identified as the candidate's proposed team for the Project and/or the selection criteria for the proposed team for the Project, as applicable. After evaluating the responses to this RFQ, MGSD will score all firms and shortlist the three most-highly qualified candidates, except if the School District determines that fewer than three firms are qualified. It will re-advertise the RFQ pursuant to Section 143-128.1A(d) of the North Carolina General Statutes.

3.1.3 Interview

Prior to determining a final ranking of the short-listed firms, MGSD *may* elect to interview the three firms. The purpose of the interview will be to meet the proposed Design-Build teams (if applicable), become familiar with key personnel and/or with the strategy proposed by the candidate, and understand the Project approach and ability to meet the stated objectives for the Project. Please be prepared to discuss with specificity the candidate's capacity to conduct this work in compliance with a proposed timetable, budget, and the good-faith obligations. MGSD will notify each short-listed firm to schedule individual times for the interviews. After interviews each shortlisted firm will be rescored based on the published criteria, which will result in a ranking with the highest ranked firm being the most highly qualified firm.

3.1.4 Negotiations

MGSD will open negotiations with the most highly qualified Design-Builder for a contract to design and construct the Project for a fair and reasonable fee, pursuant to Sections 143-64.31(a) and 143-128.1A(d) of the North Carolina General Statutes. If MGSD cannot negotiate a contract consistent with those sections and with this RFQ, then the MGSD shall terminate negotiations and initiate negotiations with the next most highly qualified Design-Builder.

3.1.5 Notice of Owner's Discretion

MGSD reserves the right to reject any and all submissions, including the right to reject all submissions and to re-advertise the Project. MGSD further reserves the right to waive any irregularity or defect in any of the submissions received, so long as said irregularity or defect does not render the submission nonresponsive or in violation of Chapter 143 of the North Carolina General Statutes.

3.2 Scoring Criteria

All firms submitting responses to this RFQ will be evaluated pursuant to the RFQ criteria and weighting schedule listed below. A total score will be used to determine those firms invited to the Shortlist phase.

3.2.1 Design-Builder Evaluation/Selection Criteria and Scoring

Each submitter will be evaluated and shortlisted based on their Statement of Qualifications score (100 points maximum) as determined through a qualification review process and scoring criteria noted below:

- Design-Build Team Experience and Qualifications: <u>25 Points</u>
 - o Includes: team experience, past relevant projects, satisfaction level of past clients.
- Proposed Design & Engineering Professionals' Experience and Qualifications: 20 Points

- Design Builders demonstration of past energy-efficient performance as demonstrated by EPA Energy Star scores on past projects: 20 Points
- Project Understanding and Approach: 20 Points
- Minority Business Participation: <u>5 points</u>
- Deliverable Quality, Project Schedule, and Safety Controls: 5 Points
- Statement of Qualifications Quality and Responsiveness: <u>5 Points</u>
 - o If interviews are conducted, up to <u>10 Points</u> may be added to the above total, based on evaluation of the panel, for a possible total of 110 points.

Section 4: MINORITY & FEMALE-OWNED, SMALL BUSINESS, and DISADVANTAGED BUSINESS ENTERPRISE PARTICIPATION

4.1 Discrimination Policy

MGSD does not discriminate on the basis of race, color, sex, national origin, religion, age, or disability. Any contractors or vendors who provide services, programs or goods for MGSD are expected to fully comply with the MGSD's non-discrimination policy.

4.2 Participation Goal

In accordance with North Carolina General Statute 143-128.2, MGSD established a verifiable ten percent (10%) goal for all building construction contracts for participation by Historically Underutilized Businesses as defined by the NC Department of administration HUB Office.

PERFORMANCE QUESTIONNAIRE

Your assistance is requested in support of a source selection.

Please complete this Questionnaire and mail or email to:

Terry K. Haas

Chief Financial Officer

thaas@mgsd.k12.nc.us (704) 658-2540

When complete, the information on this form is SOURCE SELECTION SENSITIVE INFORMATION $(41\ U.S.C.\ 423)$ and shall be protected accordingly.

| 1 80 | | | | | | | |
|--|---|-------------------|------------------|-------------|-------------|--|--|
| TO BE COMPLETED BY OFFEROR | | | | | | | |
| CONTRACTOR or ARCHITECT NAME & ADDRESS: | 2. CONTRACT NO.: | | | | | | |
| | 3. CONTRACT INITIATION DATE: | | | | | | |
| | 4. COMPLETION DATE: | | | | | | |
| | 5. CONTRACT VALUE (with options): \$ | | | | | | |
| | 6. TYPE OF C | CONTRACT: | | Design Bid | | | |
| | Construction Manager at RiskOther (please indicate) | | | | | | |
| 7. PROJECT TITLE, LOCATION, AND DESCRIPTION (Including TOTAL Co | ONSTRUCTION | VALUE): | | | | | |
| Please add a continuation page | e if additional | space is nec | essary. | | | | |
| TO BE COMPLETED BY EVALUATIN | NG ORGANIZA | TION REPRES | SENTATIVE | | | | |
| 8. EVALUATION: A. EVALUATOR'S NAME, POSITION (Project Manager | / COR/ Other) AN | ND ORGANIZA | TION: | | | | |
| B. EVALUATOR'S PHONE NUMBER: | C. MONTHS | PERFORMAN | CE MONITOR | ED BY EVALU | JATOR: | | |
| Please circle the response code for each topic (A – G) that best reflects y | | with this Con | tractor or Arc | hitect. | | | |
| | = Poor | • | | | | | |
| <u> </u> | O = Not Observ | ved | | | | | |
| CIRCLE THE MOST APPROPRIATE RESPONSE | | | | | | | |
| A. Quality of Products and Services - Assess the contractor's conforma | ance to contract re | equirements, spe | cifications, and | l | | | |
| standards of good workmanship (| | - | | | standards). | | |
| 0 | \mathbf{E} | A | M | P | N/O | | |
| B. Performance – Assess the Contractor's or Architect/Engineer's over | rall performance | for the project. | | | | | |
| 0 | E | A | M | P | N/O | | |
| C. Schedule – Assess the timeliness of contractor in meeting the projec | t schedule (deadl | ines) | | | | | |
| 0 | E | A | M | P | N/O | | |
| | | | | | | | |
| D. Design- Assess the degree of functionality of the overall design. | | | | | | | |
| 0 | E | A | M | P | N/O | | |
| E. Design - Assess the Architect's appropriate use of materials, in terms | of durability, cost | t, and appearanc | | | | | |
| 0 | E | A | M | P | N/O | | |
| F. Design - Assess degree that Owner's program requirements were met | in final design | | | | | | |
| O | E | A | M | P | N/O | | |
| v | L | 11 | 141 | • | 100 | | |
| D. Technical Requirements – Assess the contractor's ability to fulfill th | e technical requir | rements of the co | ontract. | | | | |
| 0 | E | A | M | P | N/O | | |
| | | | | | | | |
| E. Cost Control – Assess the contractor's ability to manage the contract | - | | | _ | | | |
| 0 | E | A | M | P | N/O | | |
| F. Customer Satisfaction – Assess the contractor's responsiveness to cu | stomer concerns | and "user friend | liness". | | | | |
| 0 | E | A | M | P | N/O | | |
| | | | | | | | |
| G. Overall Assessment of Contractor, or Architect, or Team (as appropriate) | | | | | | | |
| | IF. | | М | D | N/O | | |