### BEST VALUE EVALUATION CRITERIA AND QUESTIONNAIRE

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As used herein, the term “entity” means the prospective bidder submitting this Questionnaire regardless of whether the entity is a sole proprietorship, a corporation, joint venture, or partnership. Please note that the term “prospective bidder” may sometimes be used interchangeably with the term “entity.”

|  |  |  |
| --- | --- | --- |
| **SUBMITTED BY:** |  |  |
|  |  | (Entity Name. If a Joint Venture, state name of JV Entity) |
|  |  |  |
|  |  | (Contact Name) |
|  |  |  |
|  |  | (Address) |
|  |  |  |
|  |  | (City, State, Zip Code) |
|  |  |  |  |  |
|  |  | (Telephone Number) |  | (Facsimile Number) |
|  |  |  |  |  |
|  |  |  |
|  |  | (E-mail) |

**INSTRUCTIONS:**

Bidders shall submit a completed Best Value Questionnaire by responding to the following questions and criteria and shall attach all required documents and information as indicated below. Package shall be in PDF format and tabbed and using the same outline format presented in this questionnaire.

Submit this entire questionnaire and associated attachments as required by Supplementary Instructions to Bidders Item 7 in Article 5.3.1 Submission of Bids.

In addition to submitting questionnaire responses, the Bidder shall submit items to support Item II - Relevant Experience and Item III - Demonstrated Management Competency.

Provide responses to the Best Value criteria using the same outline format presented in this questionnaire, Article I through V. If no response is given to a question, then no points will be given.

See checklist at the end of this Questionnaire.

**TOTAL POINTS AVAILABLE – 1,000**

1. Financial Condition……………………………. 150 Points
2. Relevant Experience…………………………... 275 Points
3. Demonstrated Management Competency…... 275 Points
4. Labor Compliance……………………………… 150 Points
5. Safety Record…………………………………... 150 Points

 Total Points……………………………………....1,000 Points

1. **FINANCIAL CONDITION – 150 POINTS**
2. Enter your firm’s current bonding capacity. $\_\_\_\_\_\_\_\_\_\_\_\_\_.00.
3. Submit a signed declaration from the Surety Company stating the amount of bonding capacity available to your firm. In addition, either submit a notarized declaration or include the following in the last paragraph of the declaration:

“The undersigned declares under penalty of perjury that the above statement(s) submitted is true and correct and that this declaration was executed in \_\_\_\_\_\_\_\_\_ County, \_\_\_\_\_ (state), on \_\_\_\_\_\_ (date).”

1. Submit proof of your firm’s current Liability Insurance.

(NOTE: SURETY COMPANIES USED BY BIDDER SHALL BE AN ADMITTED SURETY INSURER AS DEFINED IN THE CALIFORNIA CODE OF CIVIL PROCEDURES SECTION 995.120.)

If bonding capacity meets or exceeds the $2,700,000.00 minimum the value, full points will be given.

1. **RELEVANT EXPERIENCE – 275 POINTS**
	1. **Instructions:**
		1. Bidder shall submit a narrative that responds to the items listed in Article II.B.1 thru 9, Project Narrative Outline. Narratives shall follow the outline format of Article II.B.1 thru 9, Project Narrative Outline (Max 3 pages per project in 8 ½ x 11 page format).
	2. **Project Narrative Outline. Include the following information for three (3) Qualifying Projects:**
		1. General project information of the Qualifying Project submitted with your Prequalification package:
			1. Project name:
			2. Location:
			3. Name of Owner and current contact information (name, address, telephone # and email address):
		2. Briefly describe the Qualifying Project type using words such as renovation, new construction, medical, healthcare, lab, etc. Was this project delivered utilizing Job Order Contracting (JOC)?
		3. Describe your firm’s quality control and inspection process implemented during the construction phases of the Qualifying Project to ensure conformance with all codes, owner standards, specifications, drawings and tracking of non-conformance and punch list items.
		4. Describe any specific challenges with the Qualifying Project that had to be overcome including lessons learned, and specific concerns during the pre-construction and/or construction phases and how they were resolved.
		5. Describe any significant issues on the Qualifying Project to account for the difference between original and final schedule and the difference between original and final cost.
		6. Describe how you would approach the development of an Infection Control Risk Assessment (ICRA) plan for a project that requires a ICRA Class IV permit. Include a description of how you would exhaust the air and maintain negative pressure.
		7. Describe how you would approach building a temporary construction barrier for a project located in a rated main corridor of an I-2 occupancy building. Include all required elements.
		8. Describe how you would overcome procurement challenges to meet a contract schedule.
		9. Provide an example of how you would mitigate noise, vibration, and other construction-related concerns.
2. **DEMONSTRATED MANAGEMENT COMPETENCY – 275 POINTS**

### Instructions:

* + 1. Bidder shall submit a schedule narrative as required in Article III.B.1 (Max 1 pages in 8 ½ x 11 page format).
		2. Bidder shall submit responses to items listed in Article III.C.1 thru 3 and shall follow the outline format (refer to individual items for page counts).
		3. Bidder shall submit a narrative that responds to the items listed in Article III.C.4 thru 5. Narrative shall follow the outline format (Max 2 pages in 8 ½ x 11 page format).

### Contract Schedule:

1. Bidder shall submit a schedule narrative describing the bidders understanding of JOC project delivery with assumptions and potential schedule issues, if any. Describe your preferred scheduling software.

# Project Team Organization, management, and staffing plan

* + 1. Bidder shall submit an Organizational Chart as part of its bid identifying all of the proposed key personnel and how the team will be managed. If any of the team members have changed from the originally submitted Prequalification Submittal, each new team member shall be identified. Indicate whether or not each key person has worked together before as part of the proposed team on similar projects. Limit one (1) 8 ½ x 11 page.
		2. Bidder shall submit resumes demonstrating qualifications of the key personnel who will be assigned to this program. Key personnel are defined as, but not limited to the following: Project Executive, Project Manager, and Construction Field Superintendent. Resumes shall include experience of the key personnel. Resumes shall describe their position/title, education, professional licensing, and relevant projects over the last seven (7) years. Four resumes per 8 ½ x 11 page (see example Exhibit A the end of this Package).
		3. Bidder shall submit a table or matrix showing the Bidder’s current and pending major project commitments. Include in this table or matrix all Key Personnel, their current and planned project commitments and the percentage of time assigned to those commitments and the percentage of time available for this Project. Limit one (1) 8 ½ x 11 page.
		4. Describe what your firm’s process will be for screening and vetting subcontractor’s supplemental requests.
		5. Describe how the bidder will manage the RFI and submittal process for the JOC program. Identify the management software used to track this process.
1. **LABOR COMPLIANCE – 150 Points**
2. Provide the **name**, **address and telephone number** of the apprenticeship program (approved by the California Apprenticeship Council) from whom Bidder intends to request the dispatch of apprentices to Bidder for use on the Project.

 Name \_\_\_\_\_\_\_

 Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Telephone Number \_\_\_\_\_\_\_\_\_\_\_\_

1. If Bidder operates its own State-approved apprenticeship program state the year in which each such apprenticeship program was approved and attach evidence of the most recent California Apprenticeship Council approval(s) of Bidder’s apprenticeship program(s).
2. At any time during the last five years, has Bidder been found to have violated any provision of California apprenticeship laws or regulations, or the laws pertaining to use of apprentices on public works?

[ ]  Yes [ ]  No

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

1. During the last five (5) years, was Bidder required to pay either back wages or penalties for Bidder’s failure to comply with the State's prevailing wage laws? If "yes," identify the violation by providing the project name, date of the violation, name of the entity (or entities), a brief description of the nature of the violation, and a brief description of the status of the violation (pending, or if resolved, a brief description of the resolution).

[ ]  Yes [ ]  No.

1. **SAFETY RECORD – 150 POINTS**
2. Does your firm have a written Injury and Illness Prevention Program (IIPP) that complies with California Code of Regulations, Title 8, Sections 1509 and 3203?

[ ]  Yes [ ]  No.

1. Does your firm have a written safety program that meets CAL/OSHA requirements?

[ ]  Yes [ ]  No.

### Will your firm have personnel assigned and dedicated to Safety on this project?

[ ]  Yes [ ]  No.

If “Yes”, state the names of all such personnel who will be assigned and individually list their specific duties:

Name, Title Specific Duties

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Include in their resumes (see Article III.C.2) safety certifications and/or safety related training received.

1. Have you had accidents, which resulted in a construction fatality, on any of your projects within the last five (5) years?

[ ]  Yes [ ]  No.

If yes, provide additional information. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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1. Do you have any recordable injury in the past 5 years?

[ ]  Yes [ ]  No.

If “yes”, include the average total recordable injury for the past 5 years: \_\_\_\_\_

Include a total recordable illness rate for the past 5 years: \_\_\_\_\_

Include lost work rate for the past 5 years: \_\_\_\_\_

1. Attach EMR verification from State of California or from insurance company for each of the past 5 years.

EMR Rating:

Current Current: \_\_\_\_\_\_

Previous year 2: \_\_\_\_\_\_\_\_

Previous year 3: \_\_\_\_\_\_\_\_

Previous year 4: \_\_\_\_\_\_\_\_

Previous year 5: \_\_\_\_\_\_\_\_

 **G**. Have you had Cal-OSHA fines in the Serious, Repeat or Willful categories?

If yes, provide additional information. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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I declare under penalty of perjury under the laws of the State of California that the information provided above is true and correct.

Bidders’ Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_

Name of the person signing: \_\_\_\_\_\_\_\_\_\_\_\_\_

Title/Position at the company: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### CHECK LIST – EXHIBIT A

Provide responses using the same outline format presented in this questionnaire, Article I through V. Package shall be in PDF format and tabbed.

|  |  |  |  |
| --- | --- | --- | --- |
| Check | Item | Ref. | Sheets |
|  | Completed Questionnaire |  |  |
|  | Signed Declaration from Surety | I.B |  |
|  | Proof of Liability Insurance | I.C |  |
|  | Relevant Experience Narrative | II.B.1 thru 9 | Max 3 pages per project |
|  | Schedule Narrative  | III.B.1 | Max 1 page |
|  | Organization Chart | III.C.1 | Max 1 page |
|  | Key Personnel Resumes | III.C.2 | (4) per page |
|  | Project Commitment Matrix | III.C3 | Max 1 page |
|  | Management Narrative  | III.C.4 thru 5 | Max 2 pages |
|  | Additional Labor Compliance Documents if Necessary | IV |  |
|  | EMR Verification | V.F |  |

**Exhibit A - Example of requested 4 resumes per page per Article III.C.2**

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