### BEST VALUE EVALUATION QUESTIONNAIRE

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As used herein, the term “entity” means the prospective bidder submitting this Prequalification 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: The criteria used for each project should reflect the specific needs and requirements of that project. However, absent approval from the Office of the President: (1) the five categories listed may not be modified (2) no changes may be made to the specific questions in the Labor Compliance Issues category. Points allocated per category within the allowed range may be determined by the Campus

### Total Points Available – 1000 Maximum

**1. FINANCIAL CONDITION**

### Points – {Minimum Allocation = 150}

The University requires that Bidders provide the following information regarding their financial condition. To verify the following information, each Bidder shall also submit a copy of its latest financial statement, either reviewed or audited in accordance with Generally Accepted Accounting Principles.

Current assets $\_\_\_\_\_\_\_\_\_\_\_

Current liabilities $\_\_\_\_\_\_\_\_\_\_\_

Total Revenue $

Net Income $

Total Debt $\_\_\_\_\_\_\_\_\_\_\_

Total Assets $

Total net worth $\_\_\_\_\_\_\_\_\_\_\_

**NOTE: A financial statement that is not either reviewed or audited is not acceptable.**

**2. RELEVANT EXPERIENCE**

### Points – {Minimum Allocation = 150}

a. Demonstrate overall experience of Bidder with the type of construction required for the Project by providing detailed and relevant examples of past or current projects that relate to or are similar in scope/complexity/design to the Project. With respect to each project listed herein, address all disputes/claims/delays and all value engineering/cost savings/schedule savings recommended by Bidder and implemented on the Project

b. Provide information on previous experience with University projects within the past 5 years by both the entity and Project team members, specifically addressing all disputes/claims/delays and all value engineering/cost savings/schedule savings recommended by Bidder and implemented on the Project. This area should provide detailed explanations of the issues involved and the resolution.

**3.** **DEMONSTRATED MANAGEMENT COMPETENCY**

### Points – {Minimum Allocation = 150}

### A. Proposed Contract Schedule

The University requires that Bidders develop and submit a Proposed Contract Schedule as part of its bid identifying all of the proposed phases of construction, key milestones, the interrelationship of phases, and a description of assumptions and schedule issues, if any.

# B. Project Team Organization

Each Bidder shall include the following information:

**1. Organizational Chart:**

The University requires that Bidders develop and submit an Organizational Chart as part of its bid identifying all of the proposed key personnel of each team component 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 along with background information describing the new team member.

**2. Qualifications of Key Personnel:**

Each Bidder shall submit resumes demonstrating qualifications of the key personnel who will be assigned to this project. Key personnel are defined as, but not limited to the following: {EXAMPLES: Project Planner, Project Manager, Project Engineer, Construction Project Manager, Construction Field Superintendent}. Resumes shall include a description of training and experience of the key personnel in their respective areas of expertise. Resumes shall describe their current position/title, proposed position/title, education, professional licensing, and work experience over the last ten (10) years. Each resume shall also indicate whether or not each key person has worked before as part of the proposed team on similar projects.

**C. Management and Staffing Plan**

Each Bidder shall also be responsible for developing and submitting a Management and Staffing plan which illustrates the management approach to performing the Work; and the required staff including the key personnel along with their identified time commitments required to perform the Work plan.

The Management and Staffing Plan must indicate all staff required through completion of Construction. Each Bidder must submit a staffing schedule tied to the Preliminary Schedule showing the time commitment of each individual identified under the key personnel item herein.

Each Bidder shall also be responsible for developing and providing as part of this bid 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.

**4.** **LABOR COMPLIANCE**

### Points – {Minimum Allocation = 150}

1. 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 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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).

1. If any of the trade work identified below will be performed by subcontractors listed by Bidder in the Subcontractor Listing that accompanies its bid then answer the question below for each of such affected subcontractors.

{EXAMPLE: Electrical, plumbing etc.}

Provide the **name**, **address and telephone number** of the apprenticeship program (approved by the California Apprenticeship Council) from whom Subcontractor intends to request the dispatch of apprentices to Subcontractor for use on the Project.

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

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

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

If Subcontractor 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 Subcontractor’s apprenticeship program(s).

1. 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. If any of the trade work identified below will be performed by subcontractors listed by Bidder in the Subcontractor Listing that accompanies its bid then answer the question below for each of such affected subcontractors.

{EXAMPLE: Electrical, plumbing etc.}

During the last five (5) years, was [IDENTIFY SUBCONTRACTOR] 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?

Yes  No.

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).

1. If any of the trade work identified below will be performed by subcontractors listed by Bidder in the Subcontractor Listing that accompanies its bid then answer the question below for each of such affected subcontractors.

{EXAMPLE: Electrical, plumbing etc.}

During the last five (5) years, was [IDENTIFY SUBCONTRACTOR] required to pay either back wages or penalties for [IDENTIFY SUBCONTRACTOR] failure to comply with the State's prevailing wage laws?

Yes  No.

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).

**5. SAFETY RECORD**

**Points** – **{Minimum** **Allocation = 150}**

1. 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

1. Will your firm have personnel permanently 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 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Attach resumes (include certification and 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. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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 Category Code: \_\_\_\_\_\_\_\_\_\_\_\_\_

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

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

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: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_