STATE OF NORTH CAROLINA

Section E: Qualifications Questionnaire for Construction Manager at Risk

Due Date: September 29th, 2016; 4:00 PM

Submitted to: Buddy Hale,
UNC Greensboro, Facilities Design and Construction, 105 Gray Drive, Greensboro, NC 27412,
Phone: 336-334-5269, E-mail: tohale@uncg.edu

Provide all of the information below in the order listed:

Project Title: Nursing and Instructional Building,
UNC at Greensboro, Greensboro, NC

Table of contents: Provide a Table of Contents:

Proposer’s Name and Principal Office serving this project:
(Include Company Name and address along with the name of the contact person with telephone number and e-mail address)

I. Profile of Proposer:

A. Give corporate history of the company including organizational structure, years in business and evidence of authority to do business in North Carolina.

B. Provide annual workload for each of the last five (5) years; number of projects and total dollar value.

C. List projects for which the company is currently committed including name & location of each project, time frame to complete & dollar volume of each project.

D. Financials – Attach latest balance sheet and income statement if available, based on company type. Audited statements preferred. If not available, attach a copy of the latest annual renewal submission to the relevant licensing board. Indicate Dunn & Bradstreet rating if one exists. Financials shall be submitted in a separate enveloped and provided as Attachment 1. The financial will not be counted toward your total page count. (Firms must submit financial data and may clearly indicate a request for confidentiality to avoid this item becoming part of a public record.)

E. Attach letter from Surety Company or its agent licensed to do business in North Carolina verifying proposer’s capability of providing adequate performance and payment bonds for this project.

F. Proposers must possess all licenses required by North Carolina law, including, at a minimum, an unlimited general contractor’s license in the building classification. Submit proof of current licensing with proposal.
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G. List all construction projects performed by the proposer for agencies and institutions of the State of North Carolina during the past 10 years.

H. Litigation/Claims. If yes to any of the questions below, list the project(s), dollar value, contact information for owner and designer and provide a full explanation with relevant documentation.

1. Has your company ever failed to complete work awarded to it? ___Yes ___No

2. Has your company ever failed to substantially complete a project in a timely manner (i.e. more than 20% beyond the original contracted, scheduled completion date)? ___Yes ___No

3. Has your company filed any claims with the North Carolina State Construction Office within the last five years? ___Yes ___No

4. Has your company been involved in any suits or arbitration within the last five years? ___Yes ___No

5. Are there currently any judgments, claims, arbitration proceedings or suits pending or outstanding against your company, its officers, owners, or agents? ___Yes ___No

6. Has your present company, its officers, owners, or agents ever been convicted of charges relating to conflicts of interest, bribery, or bid-rigging? ___Yes ___No

7. Has your present company, its officers, owners, or agents ever been barred from bidding public work in North Carolina? ___Yes ___No
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II. Project Experience

A. List up to six projects of similar size, scope and complexity performed by the proposer.

B. For each of the six projects, include specific details on the extent to which pre-construction & construction phase services were provided.

C. For the six projects listed above where CM services were provided, list the Guaranteed Maximum Price (if given), or if not given, the estimated cost provided by you, and the total cost of the project at completion.

D. For each of the six projects above where CM services were provided, compare the number of days in the original schedule with the number of days taken for actual completion.

E. For each of the six projects listed above, attach project owner references including the name, address, telephone and fax numbers, and e-mail address of the project owner representative.

F. For each of the six projects listed above, denote if project was monitored by NC State Construction (SCO) and the name of the SCO monitor.

III. Key Personnel

A. List of key personnel who will be assigned to the project. **Attach sworn statement that the above persons will be exclusively assigned to this project for its duration.**

B. For each person listed above, list what aspects of pre-construction or construction the person will handle. For those persons who will divide their time between pre-construction and construction phases, indicate what percentage of their time will be devoted to each phase.

C. For each person listed in response to A & B above, list his/her experience with firm, other prior and relevant experience with projects of similar size and scope in construction/design, and the person’s location. Attach the resumes and references for each person listed.

D. **Attach project organizational chart** indicating the placement of each of the persons listed in response to A & B above.

IV. Project Planning

A. Provide a brief, overall description of how the project will be organized and managed, and how the services will be performed in both Pre-Construction and
Section E: Qualifications Questionnaire for Construction Manager at Risk

Construction Phases. Project planning that offers the same project manager for pre-construction and construction phases shall be given preference.

a. Value Engineering
b. Constructability Issues
c. Cost Model/Estimates
d. Project Tracking/Reporting
e. Request for Information (RFI) and Shop Drawings
f. Quality Control
g. Schedule and Staffing Plan

B. Minority Participation: Describe the program (plan) that your company has developed to encourage participation by Minority and other HUB firms to meet or exceed the 30% participation goals set by The University of North Carolina at Greensboro. **Attach a copy of that plan to this proposal.** Provide documentation of the Minority and other HUB participation that you have achieved over the past two years on both public and private construction projects. Outline specific efforts that your company takes to notify Minority and other HUB firms of opportunities for participation. The Proposer must identify the responsibilities of each Joint Venture, Partnership Party, Mentor Protégé, or Associate with respect to the scope of services/work inclusive of the requirements for each entity based on such services as described in this RFP document. The Mentor-Protégé Program must be designed to ensure and enhance the capability of protégé participants to be competitive, achieve entrepreneurial success, and contribute to the strength and vigor of our economy.

Provide HUB participation experience for the last 3 years for both private and state projects. If it was a joint venture, what was done together or individually.

Indicate the minority participation goal that you expect to achieve on this project.

This the _____ day of ____________, 20_______

**COMPANY NAME**

By: ______________________________

Title: ______________________________

Attest:

______________________________ (Corporate Seal)
STATE OF NORTH CAROLINA

Section E: Qualifications Questionnaire for Construction Manager at Risk

VERIFICATION

I HEREBY CERTIFY THAT THE RESPONSES OF ___________________________ ARE CORRECT AND TRUTHFUL TO THE BEST OF MY KNOWLEDGE AND FOR THOSE RESPONSES GIVEN WHICH ARE BASED ON INFORMATION AND BELIEF, THOSE RESPONSES ARE TRUE AND CORRECT BASED ON MY PRESENT BELIEF AND INFORMATION.

This the ______ day of ______________, 20__________

**COMPANY NAME**

By: ___________________________

(Corporate Seal) 

President

Attested: ___________________________

Secretary

STATE OF _______________________

COUNTY OF ______________________

I, __________________________, a Notary Public in and for the County and State aforesaid, hereby certify that __________________________ personally came before me this day and acknowledged that he/she is secretary of ______________ and that by authority duly given and as the act of the corporation, the foregoing instrument was signed in its name by its president, sealed with its corporate seal, and attested by him/herself as is secretary.

Witness my hand and official seal, this the _____day of ______________, 20__________

__________________________

Official Signature of Notary

__________________________, Notary Public

Notary’s Printed or Typed Name

__________________________

My Commission Expires:
Non-Collusion and Non-Suspension Statement

The undersigned certifies that (name and business address of CM candidate), North Carolina General Contractor License Number _____, has not in connection with this proposal or in any instance engaged in any conspiracy, combination, or any other act in restraint of trade or commerce declared to be unlawful by the provisions of N.C.G.S. 75-1 and 75-2 where the combination, conspiracy or other unlawful act in restraint of trade involves a contract for construction, renovation or repair, let or to be let by a governmental agency or a subcontract for construction renovation or repair with a prime contractor or proposed prime contractor for a governmental agency. N.C.G.S. 133-24.

Furthermore, the undersigned certifies that it is familiar with the response to the RFP for the University of North Carolina at Greensboro’s Nursing and Instructional Building and that said response, is fair and proper and is not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the undersigned or any of its agents, representatives, owners, employees or parties in interest. N.C.G.S. 133-30.

Finally, the undersigned certifies that it has not been suspended from bidding by the North Carolina State Building Commission or any other State building authority and that it is not an affiliate or subsidiary of any company suspended by the North Carolina State Building Commission or any other State building authority.

By____________________________________
Title___________________________________
Date____________________________________

IN WITNESS WHEREOF, I have hereunto set my hand and Notarial Seal this the _______ day of ________________, 20_______.

________________________________________
Official Signature of Notary

__________________________, Notary Public
Notary’s Printed or Typed Name

________________________________________
My Commission Expires:
Nursing and Instructional Building
Code # 46625       Item # 301

CM at Risk Pre-Proposal Meeting
Thursday, September 8, 2016 1:00 – 1:32 PM

Attendees: Sloan Stryffeler (Edifice); Amber Smith, Glenn Wise, Dave Perez, Matt Meyer (JE Dunn/New Atlantic); John Marr, David Repnyek, Tim Gray (Gilbane/Rentenbach); Adam Cardin, Rodney Cheek (Samet/SRS); Mark Dunnagan (Blum/TA Loving); Dennis Bowie (UNCG/FDC); Dan Moore (Walbridge), Vinnie Goel (A1Consulting {HUB}); TO “Buddy” Hale (UNCG/FDC); Garland Burton (BE&K Building Group); Janelle Rayford (Omni Source Solutions); Harrison Agbozo (Walter B. Davis Co.); Stewart Cowden (Barnhill); Donovan Everett (D.A. Everett); Jay Mosier, Chad Tate, Steve Gray, Justin Stillman, James Clayton (Rodgers/DPR); Jim Downing (Vannoy); Charlie Lewis (Barton Malow); Jamal S. Mention (J.S.Mention); Daniel L. Hall (Hamlett Associates, Inc.); Tom Hyzak, Steve Gourley, Emmalee Morris (Skanska); Brittany Grabsk (China Construction); Matt Takacs (UNCG/FDC); Tony Phillips (UNCG/HUB); Scott Baker (LS3P)

The following are additional notes taken from the Pre-Proposal Meeting.

- Project Description
- Project Specifics:
  - MBE/HUB
    This project should go beyond 30% HUB/MBE participation. When you write your HUB plan, do not include documentation “per the general statutes”. 10% means nothing to a $105,000,000 project.
    We want one point of contact from day one who is the HUB Contact. This will allow Mr. Phillips to communicate with one individual regarding any minority concerns during this project.
  - Scope
  - Location
- Process
  Provide in the RFP, HUB experience for the last 3 years for private and state projects. If it was a joint venture, what was done together or individually.
- Pre-Selection Committee
- Proposal Organization
- Helpful Hints
  - Remember to sign and stamp your submittal
- Questions:
  1) Is the cover page/cover letter included in the required total number of pages?
    - No. The cover page/cover letter is not included.
2) Is the page limit 15 double-sided pages for total of 30-page or 30 double-sided pages for a total of 60-pages?
   - **30 double-sided pages for a total of 60-pages**

3) Do section dividers count toward the total number of pages?
   - **A blank divider page does not count toward the page total. If the page is not blank, it does count toward the page total.**
# New Nursing & Instructional Building and South Chiller Plant

**CM@R Pre Proposal Meeting**

September 9th, 2016

<table>
<thead>
<tr>
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<td>Vinnie Goel</td>
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NURSING AND INSTRUCTIONAL BUILDING

CMR PRE-PROPOSAL MEETING
CMR PRE-PROPOSAL AGENDA

• WELCOME
• PROJECT DESCRIPTION
• PROJECT SPECIFICS
  • MBE/HUB
  • SCOPE
  • LOCATION
• PROCESS
• PRE-SELECTION COMMITTEE
• PROPOSAL ORGANIZATION
• HELPFUL HINTS
• QUESTIONS
WELCOME

• KEN PEARCE – DIRECTOR OF FACILITIES DESIGN AND CONSTRUCTION
• TONY PHILLIPS – MBE/HUB COORDINATOR
• PROJECT CONTACT
  • BUDDY HALE – ASSISTANT DIRECTOR OF CONSTRUCTION
• THIS IS A MANDATORY PRE-CONSTRUCTION MEETING
  • ONE REPRESENTATIVE OF THE CMR FIRM IS REQUIRED TO BE IN ATTENDANCE IN ORDER TO SUBMIT A RESPONSE UNCG’S REQUEST FOR PROPOSAL
  • IF THE SUBMISSION IS A JOINT-VENTURE, ONLY ONE MEMBER OF THE JV IS REQUIRED TO BE IN ATTENDANCE
• PLEASE COMPLETE SIGN-IN SHEET
• PLEASE PLACE A BUSINESS CARD IN REPOSITORY
PROJECT DESIGN TEAM

- ARCHITECT: LS3P, RALEIGH, NC IN ASSOCIATION WITH SMITHGROUP JJR
- CIVIL: TIMMONS, GREENSBORO, NC
- LANDSCAPE ARCHITECT: STEWART, RALEIGH, NC
- STRUCTURAL: SKA CONSULTING ENGINEERS, GREENSBORO, NC
- MEP: AFFILIATED ENGINEERING INCORPORATED, CHAPEL HILL, NC
- AV: THE SEXTANT GROUP, RALEIGH, NC
- COST: CUMMING CORPORATION, DURHAM, NC
PROJECT DESCRIPTION

• THIS PROJECT INCLUDES DEMOLITION OF THE MCIVER BUILDING AND CONSTRUCTION OF A 180,000SF, NEW FOUR STORY FACILITY.

• BUILDING WILL HOUSE THE SCHOOL OF NURSING AND PROVIDE CLASSROOM SPACE, TEACHING AND FLEXIBLE LABORATORY RESEARCH SPACE FOR BIOLOGY, CHEMISTRY AND HEALTH AND HUMAN SCIENCES.

• THE SCHOOL OF NURSING WILL OCCUPY APPROXIMATELY 50% OF THE BUILDING, INCLUDING TEACHING AND SIMULATION LABS.

• THE BUILDING WILL INCLUDE WET LABS, RESEARCH SPACE, OFFICES AND CONSTRUCTION OF SOUTH CHILLER PLANT

• THE PROJECT HAS A TOTAL PROJECT BUDGET OF $105,000,000.00.
PROJECT SPECIFICS

• MBE/HUB

• THE UNIVERSITY OF NORTH CAROLINA AT GREENSBORO EXPECTS TO EXCEED A 30% PARTICIPATION GOAL.

• THE PROPOSER MUST IDENTIFY THE RESPONSIBILITIES OF EACH JOINT VENTURE, PARTNERSHIP PARTY, MENTOR PROTÉGÉ, OR ASSOCIATE WITH RESPECT TO THE SCOPE OF SERVICES/WORK INCLUSIVE OF THE REQUIREMENTS FOR EACH ENTITY BASED ON SUCH SERVICES AS DESCRIBED IN THIS RFP DOCUMENT. THE MENTOR-PROTÉGÉ PROGRAM MUST BE DESIGNED TO ENSURE AND ENHANCE THE CAPABILITY OF PROTÉGÉ PARTICIPANTS TO BE COMPETITIVE, ACHIEVE ENTREPRENEURIAL SUCCESS, AND CONTRIBUTE TO THE STRENGTH AND VIGOR OF OUR ECONOMY.
PROJECT SPECIFICS

• SCOPE
  • THE PROJECT HAS THREE FACETS
    • THE DEMOLITION OF THE EXISTING MCIVER BUILDING
    • THE CONSTRUCTION OF THE NEW NURSING AND INSTRUCTIONAL BUILDING
    • THE CONSTRUCTION OF PHASE I OF THE SOUTH CHILLER PLANT.
  • DEMOLITION – TIGHT SITE, LIMITED LAYDOWN SPACE, LIMITED PARKING, LIMITED DISTANCE BETWEEN BUILDINGS
  • PROJECT HAS TWO SEPARATE SITES – ONE FOR DEMO AND NEW BUILDING AND ONE FOR SOUTH CHILLER PLANT
  • STAND—ALONE CHILLER PLANT, INITIAL BUILD OUT OF 2,000 TONS.
  • FUTURE EXPANSION CAPABILITIES TO AN ULTIMATE CAPACITY OF 7,500 TONS.
LOCATIONS

1. MCIVER BUILDING

108 ADMINISTRATION DRIVE, GREENSBORO, NC

2. SOUTH CHILLER PLANT

CORNER OF FOREST ST AND OAKLAND AVENUE IN GREENSBORO, NC
PROJECT SPECIFICS

- NURSING AND INSTRUCTIONAL BUILDING
  - Start of Design: November 2016
  - Completion of Design: March 2018
  - Notice to Proceed: May 2018
  - Completion of Construction: May 2020
  - Occupancy: May 2020

- SOUTH Chiller Plant
  - Start of Design: November 2016
  - Completion of Design: October 2017
  - Notice to Proceed: February 2018
  - Completion of Construction: March 2019
  - Occupancy: March 2019
PROJECT SPECIFICS

• ACCESS TO FACILITY OPERATION MUST REMAIN

• PARKING AND LAY-DOWN SPACE IS LIMITED.

• BUILDINGS AROUND DEMOLITION AND NEW BUILDING WILL BE OCCUPIED DURING THE PROJECT.

• NURSING AND INSTRUCTIONAL BUILDING
PROCESS

• After the closing date for receipt, the owner’s pre-selection committee will evaluate the proposals. Only those properly submitted and by designated date and time shall be reviewed.

• The pre-selection committee will form a shortlist of three to six firms.
  • The owner reserves the right to request clarifying information from any and all proposers at any time during the evaluation process.

• The pre-selection committee will receive an oral presentation from each firm that is shortlisted.

• The pre-selection committee will rank the top three firms in priority order based on the selecting criteria and recommend this slate of firms to the UNCG Board of Trustees.

• A contract will be negotiated number one ranked firm approved by the BOT.

• If a contract cannot be negotiated with the number one firm, the next firm will enter into contract negotiation, and so on until a contract has been executed with a firm.

• Proposal due 4:00 PM on September 29th, 2016
• PROPOSAL ARE EVALUATED USING THE SELECTION CRITERIA LIST IN SECTION E.
  • Workload that is fully able to accommodate the addition of this project.
  • Record of successfully completed projects of similar scope without major legal or technical problems.
  • Previous experience with the Owner, a good working relationship with Owner representatives, have completed projects in a timely manner and have performed an acceptable quality of work.
  • Key personnel that have appropriate specific experience and qualifications.
  • Relevant and easily understood graphic or tabular presentations.
  • Completion of CM-at-Risk projects in which there was little differences between the GMP and final cost.
  • Projects that were completed on or ahead of schedule.
  • Recent experience with project costs and schedules
• Construction administration capabilities.
• Proximity to and familiarity with the area where the project is located.
• Quality of compliance plan for minority business participation as required by N.C.G.S. 143-128.2.
• Incorporation of sustainable concepts and energy efficiency in past projects.
• Demonstrated ability to successfully management a project with multiple construction sites.
• Demonstrate the strength of pre-construction services and provide specific examples of how the preconstruction services contributed to meeting the project budget and project schedule.
• Experience in demolition with extremely limited work area
• Demonstrated experience with early packages, multi-phased construction and phased acceptance of project.
PRE-SELECTION COMMITTEE

• Members from School of Nursing and Health and Human Services

• Members from Biology, Chemistry and Facilities Departments

• Members from MBE/Hub Coordinator

• Each member of the committee has a vote.
  • Votes are not weighted... one for one vote

• Remember your audience when submitting
PROPOSAL ORGANIZATION

- The proposals organization and order are dictated by Section E: Qualifications Questionnaire
- Attachment to be included in the section requested
  - Exception financial balance sheets
HELPFUL HINTS

• THIS IS YOUR FIRST TEST QUESTION. FOLLOW DIRECTIONS!

• READ THE ADVERTISEMENT AND ALL PROVIDED MATERIAL IN ITS ENTIRETY.

• UNCG HAS PROVIDED INFORMATION IN THE PACKAGE AS TO WHAT WE EXPECT FROM OUR CONSTRUCTION MANAGER AT RISK.

• ENSURE YOU SHOW RELEVANCE ON SIMILAR PROJECT TO UNCG’S PROJECT.

• REMEMBER THE SELECTION CRITERIA AND MAKE SURE YOUR ADDRESS THEM IN YOUR PROPOSAL.

• IT IS THE SUBMITTING FIRM’S RESPONSIBILITY TO HAVE RFP RESPONSES TO THE UNIVERSITY BY THE DEADLINE.
  • THE UNIVERSITY IS NOT RESPONSIBLE FOR DELIVERY DELAYS, LOST TRUCKS OR ANY FAILURE BY THE FIRM TO DELIVER THE PACKAGE TO OUR OFFICE BY THE DEADLINE.
HELPFUL HINTS

• DESCRIBE THE PROGRAM (PLAN) THAT YOUR COMPANY HAS DEVELOPED TO ENCOURAGE PARTICIPATION BY MINORITY AND OTHER HUB FIRMS.

• DO NOT CONTACT ANYONE OTHER THAN THE PROJECT MANAGER REGARDING THIS PROJECT.
  • ANY CONTACT OR DISCUSSION OF THE PROJECT WITH SELECTION COMMITTEE, BOT’S MEMBERS, ETC MAY RESULT IN THE DISQUALIFICATION OF THE PROPOSAL.

• ALL QUESTIONS SHOULD BE SUBMITTED IN WRITING.
  • ANY QUESTION NOT SUBMITTED IN WRITING IS NOT CONSIDERED OFFICIAL AND THEY UNIVERSITY WILL NOT BE HELD ACCOUNTABLE FOR VERBAL ANSWERS TO QUESTIONS.

• ADDENDUM 1: WILL INCLUDE THIS PRESENTATION AND AN QUESTIONS ASKED DURING THIS MEETING.
FREQUENTLY ASKED QUESTIONS

• HOW MANY PAGES CAN THE RESPONSE BE?
  
• THE FORMAT SHOULD BE IN 8-1/2” X 11” PAGES. THE PACKAGE LENGTH SHOULD NOT EXCEED THIRTY (30) DOUBLE-SIDED PAGES, INCLUDING ALL REQUIRED SUBMITTED INFORMATION.

• HOW MANY COPIES DO WE PROVIDE?
  
• ONE (1) ORIGINAL PLUS TWO (2) COPIES: A TOTAL OF THREE (3)

• WILL WE BE ALLOWED TO VISIT THE SITE?
  
• THE SITE IS OPEN. PLEASE REMIND THAT WE ARE A UNIVERSITY AND WE ARE IN SESSION. ANY VISITATION SHOULD BE A QUIET AND AS LESS DISRUPTIVE AS POSSIBLE.

• WILL AN ORGANIZED SITE VISIT BE ORGANIZED?
  
• ONLY IF THE REQUESTED OR REQUIRED BY FIRMS.
FREQUENTLY ASKED QUESTIONS

• WHEN ARE PROPOSALS DUE?
  • 4:00 PM ON SEPTEMBER 29TH, 2016

• WHERE ARE THE RESPONSES TO BE SENT?
  • OFFICE OF FACILITIES DESIGN AND CONSTRUCTION, LOCATED IN THE GRAY HOME MANAGEMENT HOUSE, 105 GRAY DRIVE, GREENSBORO, NC, 27412
QUESTIONS

- **ADVERTISEMENT** – AUGUST 29, 2016
- **PRE-PROPOSAL MEETING** – SEPTEMBER 8TH, 2016
- **PROPOSALS DUE** – SEPTEMBER 29, 2016
- **INTERVIEW** – NOVEMBER 3, 2016
- **SELECTION (BOT APPROVAL)** – DECEMBER 9, 2016