

**SAN CARLOS SCHOOL DISTRICT
PROSPECTIVE LEASE-LEASEBACK DEVELOPER
PREQUALIFICATION EVALUATION PROCEDURE**

_____, 2016

Name of Developer: _____

- 1. Confirm Prequalification Statement Submitted is Responsive** – if the answer to any of the questions is “no,” then the Prequalification Package is nonresponsive. (See Section III.E of Prequalification Information)

A. Completeness

Did the Developer provide all requested information in its submitted Prequalification Statement?

Yes No

B. Signed Under Penalty of Perjury

Is the Prequalification Questionnaire signed under penalty of perjury by an individual who has the authority to bind the Developer on whose behalf they are signing?

Yes No

- 2. Incomplete, Misleading or Inaccurate Information** – if the answer to any of the questions is “yes,” then reject the Developer.

A. Is the information provided by the Developer is misleading or inaccurate in any material manner?

Yes No

B. Is the information contained in the Prequalification Package is not updated under penalty of perjury when it is no longer accurate?

Yes No

- 3. Confirm Essential Criteria**

a. License (See Section C.9. of Questionnaire)

Has the Developer held all Developer’s license(s) necessary to perform its work for at least three (3) years and have those license(s) not been suspended or revoked?

Yes No

(If no, then Developer is not qualified)

b. Registration (See Section C.8. of Questionnaire)

Is the Developer currently registered as a Public Works Contractor with the Department of Industrial Relations?

Yes No

(If no, then Developer is not qualified)

c. Disqualification (See Section C.12. and C.13. of Questionnaire)

Has the Developer ever been disqualified, debarred, forbidden, or found non-responsible or otherwise prohibited, from performing work and/or bidding on work for any school district or other public agency within the State of California in the past three (3) years.

Yes No

(If yes, then Developer is not qualified)

d. Insurance (See Section C.15. of Questionnaire)

Does Developer have liability insurance policy with a policy limit of at least \$1,000,000 per occurrence and \$2,000,000 aggregate?

Yes No

(If no, see attachment if they are capable of attaining the above limits. If not, then Developer is not qualified)

e. Workers Compensation (See Section C.16. of Questionnaire)

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

Yes No

(If no, then Developer is not qualified)

f. Bonding Capacity (See Sections C.26. through C. 31. of Questionnaire)

Does Developer demonstrated that it can provide a 10% bid bond, 100% payment bond, and 100% performance bond, each issued by a surety admitted and authorized to transact business as a surety in California?

Yes No

(If no, then Developer is not qualified)

- g. Criminal Matters and Related Civil Suits (See Section C.19. and C.20. of Questionnaire)

Has the Developer, or any of its owners or officers, shall not have been convicted of a crime involving the bidding, award or performance of a contract of a government construction project or fraud, theft, or any other action of dishonesty within the past five (5) years?

Yes No

(If yes, then Developer is not qualified)

4. Contact References

The District must contact each of Developer's references from a minimum of 3 of its most recent K-12 school district projects, including a lease-leaseback project, unless the Developer has not completed three (3) school district projects or a lease-leaseback project, in which case, the District will contact all of the Developer's references for school projects plus the most recent references from other projects so that the District contacts a minimum of three (3) references for Developer.

5. Complete Evaluation Worksheet

Insert total score from evaluation worksheet

Developer must have 55 out of 115 points or higher to qualify

Total Points

6. Appeal Process

If the Developer decides to appeal the District's qualification decision, it shall follow this procedure:

- a. Developer shall submit, in writing, within three (3) working days from notification, a request for a written response to the District to explain any aspect of the District's determination.
- b. Within three (3) working days from receipt of the District's written response to the developer's request, developer may submit, in writing, a request for reconsideration by the District's staff. Developer may submit with the request any information that it believes supports a finding that District's determination should be changed.

If the developer chooses not to avail itself of this process, the proposed prequalification rating may be adopted by the District without further proceedings.

**SAN CARLOS SCHOOL DISTRICT
PROSPECTIVE LEASE-LEASEBACK DEVELOPER
PREQUALIFICATION EVALUATION REFERENCE FORM**

_____, 2016

(To be utilized by District to evaluate references)

The District should fill out the information in Section I and then telephone the contact person. The District should then ask the questions in Section II, ensuring that it obtains the information as to whether the Developer's performance in that area was unsatisfactory, below average, average or above average. The District should then complete section III with that information and enter the average of the Total Numerical Rating of all the Evaluation Reference Forms for that Developer at the corresponding place on the Evaluation Worksheet.

Section I - General Project Information

Name of Developer:	Total Contract Costs:
	Contract Start/End Dates:
Project Title:	Actual Completion Date:
Scope of Work:	
Name of Public Agency/School District:	Telephone Number of Contact Person:
Name of Contact Person:	Date and Time of Interview of Contact Person:
Architect Firm:	Principal Architect in Charge of Project:

Section II – Telephone Interview Questions

1. Quality of Work

Were there quality-related problems on the project? Were these problems attributable to the Developer? Was the Developer cooperative in trying to resolve problems? If not, provide specific examples. **Please rate the Developer with respect to quality of work as either unsatisfactory, below average, average, or above average.**

2. Performance and Accountability

- a. Scheduling - Rate the Developer's performance with regard to adhering to project schedules. Did the Developer meet the project schedule? If not, was the delay attributable to the Developer? **Please rate the Developer with respect to scheduling as either unsatisfactory, below average, average, or above average.**

- b. Developer (Project) Management - Rate the Developer's ability to manage and coordinate its own subcontractors (if no subcontractors, rate the Developer's overall project management). Was the Developer able to effectively resolve problems? If not, provide specific examples. **Please rate the Developer with respect to project management as either unsatisfactory, below average, average, or above average.**

- c. Change Orders - Rate the Developer's performance with regard to change orders and extras. Did the Developer unreasonably claim change orders or extras? Were the Developer's prices on change orders and extras reasonable? If not, provide specific examples. **Please rate the Developer with respect to change orders as either unsatisfactory, below average, average, or above average.**

- d. Working Relationships - Rate the Developer's working relationships with other parties (i.e. owner, designer, prime contractors, other subcontractors, etc.). Did the Developer relate to other parties in a professional manner? If not, provide specific examples. **Please rate the Developer with respect to working relationships as either unsatisfactory, below average, average, or above average.**

- e. Paperwork Processing - Rate the Developer's performance in completing and submitting required project paperwork (i.e. submittals, drawings, requisitions, payrolls, etc.). Did the Developer submit the required paperwork promptly and in proper form? If not, provide specific examples. **Please rate the Developer with respect to paperwork processing as either unsatisfactory, below average, average, or above average.**

Section III - Numerical Rating

If the contact person rates the Developer unsatisfactory in any area, please attempt to provide written comments in Section II to explain the rating(s) assigned.

Developer's Name: _____

	Unsatisfactory	Below Average	Average	Above Average	RATING
1. Planning and Coordination of Work	-5	0	7	15	
2. Quality of Work	-5	0	1	5	
3. Performance and Accountability					
a. Scheduling	0	1	2	3	
b. Supervision; Subcontractor and Project Management	0	1	3	5	
d. Change Orders	0	1	2	3	
e. Working Relationship	0	0	1	2	
f. Paperwork Processing	0	0	1	2	
g. Litigation	0	1	2	3	
Total					
Maximum Possible	-10	3	20	40	

**SAN CARLOS SCHOOL DISTRICT
PROSPECTIVE LEASE-LEASEBACK DEVELOPER
PREQUALIFICATION EVALUATION WORKSHEET
_____, 2016**

Name of Developer: _____

1. Essential Criteria

If any one of the essential criteria is not met, there is no need to complete the remainder of the evaluation if this is the case.

2. References

_____ Points

Use the attached Evaluation Reference Form for each reference contacted for each Developer. Insert the average of all the scores from all references for Developer.

Average Numeric Rating from Evaluation Reference Forms	=	40 Points
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3. Years in Business Under Current License (See Section C.6. of Questionnaire)

_____ Points

10 or more years	=	15 Points
5 to 9 years	=	10 Points
2 to 4 years	=	5 Points
0 to 2 years	=	0 Points

4. Size of Completed Projects (See Section D. of Questionnaire)

Choose the one with the highest point value that Developer meets.

_____ Points

3 Completed Projects larger than \$5 million	=	10 Points
5 Completed Projects larger than \$2 million	=	8 Points
3 Completed Projects larger than \$2 million	=	6 Points
5 Completed Projects larger than \$1 million	=	4 Points
3 Completed Projects larger than \$1 million	=	2 Points

5. Liquidated Damages Per Project (See Section C.12. of Questionnaire)

_____ Points

0 Incidents	=	10 Points
1 to 4 Incidents	=	5 Points
5 or more Incidents	=	0 Points

6. Non-Compliance with Applicable Laws (See Sections C.13, 19, 20, 21, 22, 24, 25 and 26 of Questionnaire)

_____ Points

0 Projects	=	10 Points
1 to 9 Projects	=	5 Points
10 or more Projects	=	0 Points

7. Workers Compensation Modifier (See Section C.23. of Questionnaire)

_____ Points

Less than or equal to 0.85	=	10 Points
More than 0.85 and less than 1.0	=	5 Points
More than 1.0	=	0 Points

- 8. Financial Strength – Working Capital-** excluding line of credit (See Section E. of Questionnaire)

25% or more than \$2 million	=	10 Points
10% or more than \$1 million	=	5 Points
Less than \$1 million	=	0 Points

_____ Points

- 9. Financial Strength – Net Worth** (See Section E. of Questionnaire)

More than \$2 million	=	10 Points
Equal to \$1 million	=	5 Points
Less than \$1 million	=	0 Points

_____ Points

Maximum Points:	= 115
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TOTAL POINTS