

No. _____



UNITED INDEPENDENT SCHOOL DISTRICT AGENDA ACTION ITEM

TOPIC Discussion/Action re: Possible Revisions to Purchasing Policies and Procedures

SUBMITTED BY: Juan A. Molina, Ricardo Molina, Sr. and Pat Campos **OF:** Asst. Supt. for Finance

APPROVED FOR TRANSMITTAL TO SCHOOL BOARD: _____

DATE ASSIGNED FOR BOARD CONSIDERATION: _____ December 17, 2008

RECOMMENDATION:

RATIONALE:

BUDGETARY INFORMATION

BOARD POLICY REFERENCE AND COMPLIANCE

PROCUREMENT METHODS

Construction Projects

Procurement Methods for Construction Projects –

Education code 44.031

- Competitive Sealed Proposals
- Design Build Contracts
- Competitive Bidding
- Construction Manager-At-Risk
- Construction Manager Agent

Evaluation of Bids and Proposals for Construction

Services — Education Code 44.035

The Board of Trustees of a school district that is considering a construction contract using a method specified by Section 44.031(a) must, before advertising, determine which method provides the best value for the district

- The district shall base its selection on criteria authorized to be used under section 44.031(b) and publish in the request for bids, proposals, or qualifications the criteria and the relative weights given to the criteria.
- The district shall document the basis of its selection and make the evaluations public not later than the seventh day after the date the contract is awarded.

Competitive Sealed Proposals

Education code 44.039

A delivery method similar to competitive bidding. The District selects an architect/engineer to design and develop construction documents. Once documents are fully complete the District solicits proposals. Selection is based on a combination of price and other factors that the District deems provide best value.

- The district shall provide or contract for the inspection services, the testing of construction materials engineering and the verification testing services necessary for acceptance of the facility by the district.
- The district shall receive and publicly open the CSP. Within 45 days after the date of opening the district shall evaluate and rank each proposal submitted in relation to published selection criteria

Competitive Sealed Proposals

Advantages

- Selection flexibility
- Defined project scope
- Single point of responsibility
- Open, aggressive bidding
- Familiar delivery method

Disadvantages

- No design phase assistance
- Longer schedule duration
- Price not established until design complete

Competitive Sealed Proposals

Best Suited:

- New projects that are not schedule sensitive nor subject to potential change

Least Suited:

- Complex projects that are sequence or schedule sensitive.
Projects subject to potential change

Competitive Bidding

Education code 44.040

A delivery method wherein the District selects an architect/engineer to design and develop construction documents from which the District solicits lump sum bids. Selection is based on the lowest responsible bid and the contractor serves as a single point of responsibility for construction

Competitive Bidding

Advantages

- Open, aggressive bidding
- Familiar delivery method
- Defined project scope
- Single point of responsibility

Disadvantages

- No design phase assistance
- Longer schedule duration
- Price not established until bid is opened
- Lack of flexibility for change

Competitive Bidding

Best Suited:

- New projects that are not schedule sensitive nor subject to potential change

Least Suited:

- Complex projects that are sequence or schedule sensitive.
Projects subject to potential change

Step Process for CSP/BID

- Select professional services thru request for qualification statements (RFQ) for the architects and engineers
- Design phase
- Advertise and send out competitive sealed proposals (CSP) or competitive bids (BID)
- Evaluate and Award
- Issue contract documents, obtain bonding and issue notice to proceed
- Begin Construction

Draft Evaluation Form

EVALUATION OF SELECTION CRITERIA

CSP _____

The following criteria and score values will be used by a committee of school district administrators to evaluate this Competitive Sealed Proposal:

1. Price Proposal (Maximum of 50 points)
2. Relevant experience in projects of similar type and magnitude (Maximum of 30 points)
3. References related to projects listed under relevant experience above (4 points per favorable reference, Maximum of 20 points)

Project Name: _____ Date: _____

Proposer evaluated: _____

3. References related to projects listed under relevant experience above. 4 points per favorable reference - Maximum of 20 points

- Reference #1 _____ (4 pts. max.) 20
- Reference #2 _____ (4 pts. max.)
- Reference #3 _____ (4 pts. max.)
- Reference #4 _____ (4 pts. max.)
- Reference #5 _____ (4 pts. max.)

SUMMARY OF SCORE POINTS:

DESCRIPTION OF RANKING CRITERIA	VALUE POINTS	SCORE
1. Price Proposal: 50points		
Base price compared to offered low base price (Lowest offered base price/Proposed Base Price x Value Points)	50	
2. On a separate sheet, list projects of similar type and magnitude completed by your company. List name of project, owner, architect, contract amount, date of completion, and contact number of owner: 30 points		
0-5 years	20 points	
>5-10 years	25 points	
>10 years	30 points	

1. Price Proposal (50)
2. Relevant experience in projects of similar type and magnitude (30)
3. References related to projects listed under relevant experience above (20)

TOTAL SCORE:

Name & Title of Evaluator: _____

Signature of Evaluator: _____