

Heartwood RFQ evaluation

Evaluator #3; May 23, 2018

Instructions: Score you assign to proposals must be justifiable with a logical thought process. Document your scored and reasoning (notes) to be tuned with your valuation sheets. Note: All records are public records.

Evaluation Factor	Evaluation Criteria	Vendor	Jeffrey Paul Williams Jr. DBA WPJ Construction LLC
<p>Technical Qualifications: a. Ability of Professional Personnel (55 points maximum)</p>	<p>1. Do the resumes of the key staff support the firm's competency in doing this type of work? Key staff includes the Project manager, and other project team professionals. 10 points.</p>	<p>Modera Homes, LLC & Concept Companies, Inc. Yes. Four key staff resumes are included in the proposal to support the firm's competency of doing the desired kind of work. These include the Director of Construction, CEO, President and Realtor. All four staff are experienced licensed Contractors. The Director of Construction has a residential home focus. 10 points.</p>	<p>Unclear. Only the firm's CEO resume is included in the proposal. The CEO has been serving as the WPJ CEO in the past 5 years. No description of specific projects or scope provided in resume. Work experience, however, is listed in Schedules A and B. However, information is incomplete (i.e., engineering team, contract dates, cost of work, is missing), and therefore it is difficult to evaluate the experience relevance to this job. In addition, the CEO most recently served as a Public-School Facilities Manager and oversaw multiple school projects. Type of projects is not listed but implied not to be residential. 4 points.</p>
	<p>2. Has the firm done this type of work in the past? 10 points.</p>		<p>Unclear. Work experience is listed in Schedules A and B. However, information is incomplete (i.e., engineering team, contract dates, cost of work), and therefore it is difficult to evaluate the experience relevance to this job. Further info to be requested in oral interview. 3 points.</p>
	<p>3. Does the project require familiarity or specific experience relative to local land development</p>		<p>Yes. Firm previously worked in the City limits as implied from Schedules A and B.</p>

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	and/or building codes, regulations or similar regional requirements or processes, and does the firm possess such experience? (5 points)	listed in the proposal. 5 points.	5 points.
	4. What is the firms Florida Litigation history within the last ten years on projects they have worked on? (5 points)	Not clear from proposal. 0 points.	Not clear from proposal. 0 points.
	5. Any of this work to be subcontracted? If so, what are the abilities of the firm(s) to be subcontracted? (5 points)	Subcontractors not indicated in proposal. However, it is noted that Modera has sister construction companies that will collaborate on this project. 2 points. 2 points.	Subcontractors not indicated in proposal. However, it is noted that the firm will partner in a joint venture on this project. The qualifications of the partnering entity not included in the proposal. 1 points. 13 points.
Subtotal: Technical Qualifications: a. Ability of Professional Personnel (Questions 1 thru 5)	35 points maximum.		
	6. Has the company or key staff recently in the past 5-10 years done this type of work for the City, the State, or for local government?	Yes. A letter of reference from the City of Alachua Assistant City Manager, indicated that Concept Companies had multiple successful projects with the city. 10 points.	Yes. The firm worked on the A. Qujinn Jones Museum (Gainesville CRA). 10 points.
	7. Are there factors, such as unique abilities, which would make a (positive) impact on the project? Other Factors: Communication abilities, as reflected in the proposal clarity	Yes. See below. 10 points.	No. See below. 0 points.
	Other Factors: Marketing & Sales	The proposal is nicely presented and organized, in a way that is easy to follow, review and evaluate. It is aesthetically pleasing and inviting and includes above and beyond the minimal requirements. The proposal includes marketing strategy for the homes. From constructing a Model House at the	The proposal is presented in a confusing manner, pages are not bounded together or numbered, no introduction, table of contents, introduction to the team, or project understanding or any reference to the task in front of the team. Proposal does not include any marketing and sales strategy.

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		project outgo, through the company name (Modera = Modern Era), which represents the future community, to marketing and real estate professionals that are introduced as integral part of the project team.	
	Other Factors: Timeline	The proposal includes a detailed schedule of work, from date of contract execution to Certificate of Occupancy and closing.	Proposal does not include any timeline.
	Other Factors: Allowances & Design modifications	All allowances are referenced; detailed strategy for value engineering and finishes packets is included in proposal.	Some allowances are not referenced; no value engineering nor finishes strategy included in the proposal. 10 points.
Subtotal: Technical Qualifications: a. Ability of Professional Personnel (Questions 6 thru 7)	20 points maximum.		
Total: Section A: Technical Qualifications: a. Ability of Professional Personnel (Questions 1 thru 7)	55 points maximum.		19 points.
B. Capability to meet time and budget requirements (45 points maximum)	1. Does the level of key staffing and their percentage of involvement, the use of subcontractors (if any), office location, and/or information contained in the transmittal letter indicate that the firm will, or will not, meet time and budget requirements? (10 points)	Yes. Modera is part of a larger corporation, Concept Companies. As such, it relies on a large team of professionals with a range of expertise. Multiple strong reference letters are enclosed to the proposal. These reflect on the high-quality product and professionalism of the team.	Information not included in proposal. 0 points.
	2. Has the firm met or had trouble meeting time and budget requirements in similar projects? (10 points)	Unknown. TBD from reference calls.	Unknown. TBD from reference calls. 0 points.
	3. Have proof of insurability. (5 points)	Yes. Letter of reference from insurance company.	Yes. Certificate of insurance. 5 points.
	4. If time schedules are applicable, will they meet	Yes. Detailed schedule and timeline strategy is	Information not included in proposal.

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	he City's goals and timelines? (10 points)	included in the proposal. 10 points.	0 points.
	5. Workload: past (5 years), current, and future (5 points)	Past projects featured, and current projects listed. Workload unclear.	Current and future workload unclear. 0 points.
	6. Has the firm had a history of requesting change orders for work or extensions of time other than for unforeseen conditions or owner requested changes in scope? (5 points)	Unknown, TBD from reference calls. 0 points.	Unknown, TBD from reference calls. 0 points.
	45 points maximum.	25 points.	5 points.
Total: Section B: Capability to meet time and budget requirements (Questions 1 thru 6)			
Grand total	100 points maximum.	77 points	24 points
Written proposal evaluation. 100 points maximum.			
a. Understanding of project scope of work. 30 points maximum.	1. Did the proposal indicate a thorough understanding of the project scope of work? 2. Is the appropriate emphasis placed on the various work tasks? 3. Does the firm have experience with this type of project with a proven track record?	1. Yes. This is clear from the detailed Technical Proposal section. 2. Yes. Emphasis of the managing team, home construction, timelines and marketing. 3. Yes.	1. No. no reference to the specific project, site, goals or timeline. 2. No project description included in the proposal. 3. Yes. 10 points.
b. Project approach. 30 points maximum.	1. Did the firm develop a workable approach to the project? 2. Does the proposal specifically address the city's needs or is it "generic" in content?	1. Yes. 2. Specific. 30 points.	1. No. 2. Generic. 0 points.
c. Project manager.	1. Does the project manager have experience	1. Yes.	1. Unclear.



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<p>15 points maximum.</p> <p>d. Project team. 15 points maximum. 3 points each question.</p>	<p>with project comparable in size and scope? Does the project manager have a stable job history? Has he/she been with the firm long, or have there been frequent job changes?</p> <ol style="list-style-type: none"> 1. Was a project team identified? 2. Is the team makeup appropriate for the project? 3. Do the team members have experience with comparable projects? 4. Are there any sub-contracted firms involved? Will this enhance the project team? 5. Are the hours assigned to the various team members for each task appropriate? 	<p>2. Not mentioned how long PM has been with the firm. Check in Oral Interview. 7 points.</p> <ol style="list-style-type: none"> 1. Yes. Four team members; sister companies. 3 points. 2. Yes. A combination of construction professionals and marketing / realty experts. 3 points. 3. Yes. 3 points. 4. Sub-contractors not mentioned in proposal. 0 points. 5. Hours not assigned in proposal. 0 points. <p>9 points.</p>	<p>2. Yes. 8 points.</p> <ol style="list-style-type: none"> 1. Yes. Project manager and joint venture partner. 3 points. 2. Unclear. Venture partner not introduced, only firm CEO. 0 points. 3. Yes. 3 points. 4. Sub-contractors not mentioned in proposal. 0 points. 5. Hours not assigned in proposal. 0 points. <p>6 points.</p>
<p>e. Project schedule. 5 points maximum.</p>	<ol style="list-style-type: none"> 1. Is the proposed schedule reasonable based on quantity of personnel assigned to the project? 2. Are individual tasks staged properly and in proper sequence? 	<ol style="list-style-type: none"> 1. Schedule is very ambitious. May be reasonable with economies of scale. 2. Yes. <p>4 points.</p>	<ol style="list-style-type: none"> 1. Schedule is not included in proposal. 2. Sequencing not included in proposal. <p>0 points.</p>
<p>f. Proposal organization. 5 points maximum.</p>	<ol style="list-style-type: none"> 1. Was proposal organization per the RFQ? 2. Was all required paperwork submitted? 3. Did the proposal contain an excessive amount of generic boilerplate, resumes, pages per resume, photographs, etc.? 	<ol style="list-style-type: none"> 1. Yes. 2. Yes. 3. No. <p>5 points.</p>	<ol style="list-style-type: none"> 1. No. 2. Yes. 3. No. <p>3 points.</p>
<p>TOTAL: Written proposal evaluation.</p>	<p>100 points maximum.</p>	<p>87 points.</p>	<p>27 points.</p>

