

Open-End Services



UNC CHARLOTTE

Wednesday, February 4, 2015

Facilities Management

Agenda

Welcome – John A. Fessler, PE, Director

The Process – SF 330

The Past

The Schedule (contract FY)

The Chairs

The Project Managers

Questions



UNC CHARLOTTE

The Process

Overview (John A. Fessler, Director, Capital Projects)

- **Advertise, Review, Recommend, Select, Notify**
- **SF 330—Be specific, limited 30 pages**
- **Qualifications Based Selection (QBS)**
- **General Statute 143-64.31**



The Process

SF 330

Follow directions

- Number of copies
- Page length
- CD (one file pdf file please)

Winners

- Proven experience in category (the team)
- Local
- New faces



The Process

QBS

Our Team

- PE / AIA Chair
- Project Managers (two)

Your Team (workers not overhead)

- Appropriate expertise
- Past performance
- Proximity to campus
- Familiarity to local area
- Adequate staffing levels



The Past

2014/15—Fee total (\$533,490—to date)

- Architecture--\$250,885 (31 received, picked 7)
- Civil Engineering--\$121,640 (25 received, picked 3)
- Constr. Services--\$67,470 (13 received, picked 4)
- MEP--\$89,940 (15 received, picked 4)
- Surveying--\$3,555 (13 received, picked 3)
- Commissioning--\$0 (8 received, picked 1)



The Past

2013/14—Fee total (\$818,364)

- Architecture--\$321,447 (27 received, picked 8)
- Civil Engineering--\$200,852 (30 received, picked 6)
- Constr. Services--\$101,075 (18 received, picked 3)
- MEP--\$194,990 (22 received, picked 4)
- Surveying--\$0 (11 received, picked 4)
- Commissioning--\$0 (12 received, picked 2)



The Past

2014/15—Fee total \$533,490	(6 categories)
2013/14—Fee total \$818,364	(6 categories)
2012—Fee total \$1,006,051	(7 categories)
2011—Fee total \$553,225	(7 categories)
2010—Fee total \$1,119,168	(7 categories)
2009—Fee total \$500,835	(7 categories)



The Schedule

Jan 14	Post Advertisement
Feb 4	Mandatory Pre-proposal meeting
Feb 17	SF 330 due
Feb 19	Committee Chairs meet
Mar 19	Committee recommendations
Mar 23	Recommendations reviewed by senior staff
April	Board of Trustees approval
May	Notification to firms



The Chairs

Architecture—John Boal, AIA

Civil Engineer/Site—John Fessler, PE

Commissioning—Tom Sparks, PE

Construction Services—Jennifer Price, PE

MEP—Tony Schallert, PE

Surveying—Jeanine Bachtel, PE



Project Managers

Design Services

- Mac Fake, John Boal, Steve Terry, David Love
Amanda Caudle, David Daignault, Elizabeth Frere

Architectural Planning

- Chris Gilbert, Nick Patel

Capital Projects

- Jeanine Bachtel, Tom Bastian, Rick Ellis, John Fessler,
- Peter Franz, Brian Kugler, Tony Schallert,
- Dona Schauble, Tom Sparks



Questions

- **Transportation vs Civil Engineering (roads)—clarification**
- **Civil Engineering/Site—provide all services?**
- **Geotechnical Services—Construction**
- **Any contracts being renewed?**
- **CE / Landscape Architecture / Architecture**
- **Cover sheet does not count to 30 page limit**
- **Teaming due firm's services—if needed**

