



PROCUREMENT DIVISION

Park and Recreation

Request For Proposal

Tree Trimming and Disposal Services

487- TH-PRK004007

May 28, 2020

This Solicitation document is prepared in a Microsoft Word format. Any alterations to this document made by the Vendor may be grounds for rejection of proposal, cancellation of any subsequent award, or any other legal remedies available to Mecklenburg County.



**Procurement Division
700 East 4th Street, 4th Floor
Charlotte, North Carolina 28202**

May 28, 2020

This serves as official notice that Mecklenburg County located in Charlotte North Carolina through its Park and Recreation Department is soliciting and will receive proposals for Tree Trimming and Disposal Services. Requirements are outlined in the following specifications. Please review them carefully.

If you plan to submit a response, please complete **Form A. BID/Solicitation Participation Acknowledgement**.

- Return the form to Meckbids@mecklenburgcountync.gov
- By the date noted in the Schedule of Events

Questions regarding the Solicitation must be submitted by the date noted in the Schedule of Events.

- Email to Meckbids@mecklenburgcountync.gov.
- In the Subject Line include:
 - Attention: Tree Trimming and Disposal Services and 487-TH-PRK004007
 - Procurement Analyst Name (Listed below)

Proposals are to be submitted **electronically** in [MECKProcure](#) on the date noted in the Schedule of Events. Use the Checklist on the following page as a guide in preparing and submitting your response to the Solicitation.

- **NIGP Code:** 98888 Tree Trimming and Pruning Services

To submit a response to the Solicitation, vendors must create a profile in [MECKProcure](#). For more information on vendor registration and how to submit a response, please visit the Vendor Resources Site [here](#).

Technical support to assist with vendor registration or submission of your proposal/bid response will be available until 1:00 pm (EST) on the date the proposal/bid is due. Contact after 1:00 pm (EST) on the proposal/bid due date may not result in a successful bid submission.

- Contact: Karl Beil, Vendor Relationship Manager
 - Email: Karl.Beil@mecklenburgcountync.gov
 - Direct Telephone: 980-314-2033
 - Division Telephone: 980-314-2400

All changes to the terms, conditions or specifications stated in this Solicitation will be documented in a written addendum, issued by the Procurement Analyst. The Addenda will be posted in [MECKProcure](#), and may be accessed at this website by searching the Solicitation Number.

Sincerely,

Todd Holcomb
Procurement Analyst

Checklist for Submitting A Proposal:

Instructions: This Checklist is to provide guidance in submitting a response to the Solicitation. The checklist must be followed. The County may consider proposals non-responsive for any items or deadlines not met as listed below.

1. Read the document fully.
2. Submit **Form A. BID/Solicitation Participation Acknowledgement** to Meckbids@mecklenburgcountync.gov.
3. Refer to this **Schedule of Events** for dates, times and locations specific to the Solicitation.

DATE	Time (EST)	LOCATION	EVENT
5/28/2020	N/A	MECKProcure	Issue Solicitation Notice
6/11/2020	Before 2:00pm	Meckbids@mecklenburgcountync.gov	Form A. BID/Solicitation Participation Acknowledgement Forms Due
6/18/2020	Before 2:00pm	Meckbids@mecklenburgcountync.gov	Questions Due
6/25/2020	Before 2:00pm	MECKProcure	County Response to Questions
6/10 & 6/25	2:00pm	Vendor Training	Vendor Registration and Submittal Training
7/9/2020	Before 2:00pm	All proposals shall be submitted online via MECKProcure	Proposals Due
7/20 – 7/23	TBD	TBD as needed	Demonstrations / Interviews

Note: Mecklenburg County reserves the right to adjust this schedule as it deems necessary.

4. **Proposal Format** - The following items must be submitted in the following order along at the time of proposal submission. Vendors are encouraged to check off each item as the required action is completed:

- ☐ Letter of Transmittal see **Section 3.1, Proposal Content and Format**
- ☐ Executive Summary see **Section 3.2, Proposal Content and Format**
- ☐ **Form B, Pricing Worksheet**
- ☐ **Form C, Contract Exceptions Form**
- ☐ **Form D, Addenda Receipt Confirmation**
- ☐ **Form E, Minority, Women, Small Business Enterprise (MWSBE)**
- ☐ **Form F, Vendor Company Information - Background And Experience Form**
- ☐ **Form G, Vendor Reference**
- ☐ Required Insurances see **Section 3.5, Proposal Content and Format**

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1. Introduction

1.1. Objective

Mecklenburg County, located in the State of North Carolina, is seeking Bids/Proposals from qualified vendors to provide/perform Tree Trimming and Disposal Services.

Award of a Contract will be made to one (1) or more vendors on a competitive basis following the process, terms and conditions as described in this Solicitation.

Contract will be for a term of three (3) years, with option to renew for a minimum of two (2) additional consecutive one (1) year terms thereafter unless earlier terminated pursuant to the terms and conditions of the Contract.

Vendors shall provide pricing based on the requirements. The proposed cost shall remain in effect for the duration of the Contract which includes the initial term and two (2) additional consecutive one (1) year terms.

1.2. Mecklenburg County Rights and Options

- County may in its discretion require one or more vendors to make presentations to the evaluation team or appear before management and/or its representatives for an interview.
- During such interview, the vendors may be required to orally and otherwise present its proposal and to respond in detail to any questions posed. Additional meetings may be held to clarify issues or to address comments, as deemed appropriate.
- Vendors will be notified in advance of the time and format of such meetings. Since Mecklenburg County may choose to award a Contract without engaging in discussions or negotiations, the proposals submitted shall define the vendors best offer for performing the services described in this Solicitation.
- The commencement of such discussions, however, does not signify a commitment by County to execute a Contract or to continue discussions. County may terminate discussions at any time and for any reason.
- County will decide which proposal best meets the criteria outlined in the Solicitation.
- County reserves the right to waive any minor informalities or irregularities, which do not go to the heart of the proposal or prejudice other offers, or to reject, for good and compelling reasons, any and all proposals submitted.
- Should vendors find discrepancies or omissions in this Solicitation or any other documents provided by Mecklenburg County, the vendors should immediately notify the County of such potential discrepancy in writing via email as noted above, and a written addendum will be made available, if the County determines clarification necessary.
- Vendors are encouraged to make a good faith effort to include environmental considerations supporting waste reduction, recycling and buy-recycled products supporting markets for recycled and other environmentally preferable products whenever practical.
- County has [Solicitation Terms & Conditions](#) posted on the internet site which speaks to non-discrimination and equal opportunity. The County seeks to ensure that all segments of the business community have access to supplying the goods and services needed by County programs. The County affirmatively works to encourage utilization of minority business enterprise in procurement activities and provides equal opportunity for all businesses and does not discriminate against any vendor regardless of race, color, religion, age, sex, and national origin or disability.
- County reserves the right to reject any and/or all proposals in connection with this project, and to waive formalities in the proposal during any step of the procurement or awarding process (even after negotiations have begun).
- Final award of Contract is contingent upon availability of funds from Federal, State and/or local governing bodies.

2. Solicitation Process

2.1. Submission of Responses

- Responses must be submitted electronically via www.meckprocure.com.
- Responses sent by fax, email or flash drive will not be accepted.

2.2. Proposal Opening

- As required by North Carolina General Statute 143 – 131 according to type of Solicitation:
 - Procurement staff will open the proposals received after the Due Date.

- Proposals will not be read aloud or made available to inspect or copy until any trade secret issues/proprietary and/or confidential information has been resolved and a Contract has been awarded.
- Public Bid Opening required for Federally funded projects.

2.3. Evaluation

The standard of award will be based on the most comprehensive, competitive and best value solution for the County based on 100-point scale for the following criteria/weights, the County reserves the right to modify the evaluation criteria or waive portions thereof:

- **Experience. 40%**
 - Vendors will be evaluated based upon their experience in performing the same or substantially similar services, as reflected by its experience in performing such services
- **Cost . 30%**
 - Under this criterion, proposals will be compared in terms of the most reasonable, and or most effective pricing options
- **Technical Qualifications. 20%**
 - Vendors will be evaluated based upon their qualifications in performing the same or substantially similar services, as reflected by its experience in performing such services
- **Project Approach. 10%**
 - Vendors will be evaluated on their approach to completing the scope of work.
- **Interviews.**
 - Interviews may be conducted with vendors at the sole discretion of the County. Any costs associated with interviews is the sole responsibility of the vendor

2.4. Contract

- Should there be exceptions to the Contract, list them in **Form C. Contract Exception.**
- Please refer to the Sample County Contract marked below specific to this Solicitation.
 - ☒ (Sample Contract) BUSMA Purchase of Service
 - If your legal counsel needs to review the Sample County Contract for potential issues, the review must be completed prior to submitting a proposal.

3. Proposal Content and Format

3.1. Letter of Transmittal

The proposal must include a cover letter of transmittal attesting to its accuracy, signed by an individual authorized to execute binding legal documents on behalf of the vendor.

- The cover letter shall provide the name, address, telephone and facsimile numbers of the vendor along with the name, title, address, telephone and facsimile numbers of the executive that has the authority to Contract with County.
- Each vendor shall make the following representations and warranty in the cover letter, the falsity of which might result in rejection of its proposal: **“The information contained in this proposal or any part thereof, including any exhibits, schedules, and other documents and instruments delivered or to be delivered to County, is true, accurate, and complete. This proposal includes all information necessary to ensure that the statements therein do not in whole or in part mislead County as to any material facts.”**
- The cover letter must include any trade secret issues/proprietary and/or confidential information.

3.2. Executive Summary

A summary describing the vendor’s understanding of the County’s requirements/specifications and the proposed solution.

- A brief summary of the proposed total cost.
- A summary of the approach to be undertaken to perform the services.
- Highlights any superior or unique aspects of the proposal.
- If applicable, identification of the proposed project team (including responsibilities).

- If you wish to add supplemental information, please be sure the additional attachment(s) is labeled "Supplemental Information."

3.3. Statement of Work

Vendors must submit a Statement of Work to demonstrate competency in performing services as defined in this Solicitation.

- Include detailed description of the services to be completed along with sufficient information for the County to determine if the vendor meets each requirement.
- The County has identified the requirements for this Solicitation in the Scope of Work, Section 6.

3.4. Pricing

- Pricing will include all aspects of the project.
- Pricing will include travel at the [IRS Per Diem](#) rates for Charlotte NC.
- Any costs incurred in the process of preparing and/or submitting a proposal shall be borne by the proposer.

3.5. Insurance

- Evidence of adequate insurance or ability to obtain insurance must be include in the bid/response.
- Provide one of the following documents for the required insurance minimums marked below:
 - A Certificate of Insurance.
 - A signed and dated letter from your insurance provider on their company letterhead stating your ability to obtain coverage.
 - Mecklenburg County must be listed as Certificate Holder on the accord.
 - ☒ **Commercial General Liability**
 - Minimum \$1,000,000
 - Mecklenburg County must be listed as additionally insured.
 - ☒ **Automobile Liability**
 - Minimum \$1,000,000
 - ☐ **Professional Errors & Omissions**
 - Minimum \$1,000,000
 - ☐ **Network Security & Privacy Liability**
 - Minimum \$1,000,000/\$3,000,000 Aggregate
 - ☒ **Worker's Compensation and Vendors Liability**
 - State of North Carolina statutory requirements
 - If less than three (3) employees (including the owner(s)), provide signed statement on business letterhead that Worker's Compensation not required and state the number of full-time and part-time employees including owner(s)

3.6. Permits and/or Licenses

Must procure all necessary permits and licenses and abide by all applicable laws, regulations and ordinances of all Federal, State, and local governments in which work under any resulting Contract is performed.

4. Digital Accessibility Compliance

Mecklenburg County has a Digital Accessibility Policy related to all public-facing digital communications initiatives. The policy supports Mecklenburg County's goal of providing equal access to all members of the public, and complying with all applicable digital accessibility laws. Mecklenburg County has obligations under laws including (but not limited to): The Americans with Disabilities Act of 1990 (or "ADA", 28 CFR Parts 35 and 36), Section 508 of the Rehabilitation Act of 1973 (or "Section 508", 36 CFR 1194).

This policy should be used when procuring third-party products, components or services related to the "public-facing digital communications" that are considered to be in scope for accessibility compliance and defined as:

- **Mobile Websites and Applications:** Mobile optimized websites and native applications (e.g. iOS®, Android®) that can be used by the public to interact with any services offered by Mecklenburg County.

- **Websites & Social Media:** Websites and digital content (HTML or non-HTML) that can be accessed by the public via internet browser or social media platform (e.g. Facebook, etc.).
- **Other Public Facing Websites:** Other Mecklenburg County public-facing sites such as: E-Parks, EastwayRec.com, and other department websites.
- **Any other digital communications** effort towards public recipients.

To ensure compliance with this policy, a **Voluntary Product Accessibility Template (VPAT)** must be submitted to Public Information's Web Services Manager prior to any product public implementations.

5. Vendor Support

5.1. Vendor Registration and Training

Must be completed prior to response submission but is not required to access the Solicitation documents.

- See www.meckprocure.com to:
 - Register as a vendor, click on Register located on the left side of the page.
 - To access bid documents, click on Public Access located on the left side of the page.
- Training regarding Vendor Registration and Electronic Bid Submission will be provided by the Vendor Management Program Office. The training will assist with registration and electronic bid submission.
 - To participate in the training, you must [Register for training](#).
 - Confirmation of the scheduled training along with details will be forwarded to the registrant.

5.2. National Institute of Governmental Purchasing Codes (NIGP)

- NIGP Code is a universal taxonomy for identifying commodities and services in procurement systems.
- Define the code for the requested good/service.

6. Scope of Work

6.1 This contract will consist of all work necessary for the removal and disposal of Trees (alive or dead) within Mecklenburg County. It will include providing all necessary traffic control, labor, materials, and equipment required to complete this task. The contractor will remove the designated trees and dispose of all debris including but not limited to trees, limbs, and brush, and grind the stumps. All stumps shall be sawn off just above ground level, unless instructed for them to be to the ground. The contractor without additional cost to the County shall fill holes in the ground caused by the removal of trees and stumps. Trees are to be taken down within ten (10) working days of notification. NO TREES SHALL BE REMOVED FROM PRIVATE PROPERTY UNLESS SPECIFICALLY DIRECTED TO DO SO BY THE COUNTY.

6.2 It is the contractor's responsibility to have all utilities located prior to beginning any work and coordinate with utility companies to move them as necessary. The contractor shall take special care during the course of this operation to avoid damage to the existing roadway surface, sidewalks and curbs. The contractor shall avoid placing heavy equipment on sidewalks and curbs that will cause damage to these structures. Any damage caused by the contractor's operations shall be repaired at his expense. The contractor shall also take special care to avoid damage to existing roadway shoulders, side ditches, outfalls, other watercourses and drainage structures. Any damage caused by the contractor's operation shall be repaired at his expense. Damage in this case shall include the fillings of previously open ditches, watercourses or drainage structures with soil or debris.

Contractor must carry out all work according to the following specifications.

6.3. General Conditions

- 6.3.1** Contractor will remove all debris and trash generated in performing the work under this contract from each site on a daily basis. Disposal of these materials, chipped or not, is the Contractor's responsibility and must be done in a manner consistent with all applicable Local, State and Federal laws.

- 6.3.2** Following trimming or removal, all streets, driveways, sidewalks and paths must be swept clean.
- 6.3.3** Existing facilities, including grounds, structures, utilities, park amenities, trees, landscaping and so forth shall be protected by the Contractor. Any damage to existing facilities shall be reported to the County on the day such damage occurs. Contractor shall promptly repair damage with like materials when ordered to do so by the County at Contractor's expense. All repairs of damage to existing facilities shall be made to the satisfaction of the County. Failure to repair damage shall be just cause for withholding payment for work, which becomes due.
- 6.3.4** Any damage of public or private property caused by the Contractor's operations shall be resolved with the property owner within ten (10) days after damage occurs to the satisfaction of the County. The Contractor shall inform the County of any damage caused by the Contractor's operation on the day such damage occurs. Should the damage not be rectified within the time frame agreed upon or to the satisfaction of the County, the County reserves the right to repair or replace that which was damaged or assess the Contractor such cost as may be reasonable and related to damage caused by the contractor.

6.4 Safety Requirements

- 6.4.1** The contractor shall block off work areas from vehicular and pedestrian traffic while conducting work and remove temporary signs and barriers as soon as work is completed.
- 6.4.2** Prior to cutting, the contractor shall identify all overhead wires and guy wires to avoid damage to utilities.
- 6.4.3** Under no circumstances shall a work area be left in unsafe conditions. Before leaving a site unattended for any period of time the following must be addressed:
- 6.4.4** The main access road(s) entering and/or exiting a tree removal area must be cleared to allow for access by emergency vehicles.
- 6.4.5** All hangers, spring poles, and/or leaners, or any other falling hazard, must be completely felled before the end of each workday.
- 6.4.6** All trees which have been cut, even partials or minor cuts, must be felled.
- 6.4.7** Under no circumstances shall logs from trees be left for the public and adjacent homeowners to collect.

6.5 Tree Trimming Specifications

Where a tree is marked for trimming, Contractor shall:

- 6.5.1** Cut all dead, diseased or broken limbs greater than 1-1/2 inches in diameter from the marked tree.
- 6.5.2** Pruning cuts shall be clean and smooth; leaving the bark at the edge of the cut firmly attached to the wood. A three-cut process, sometimes known as "jump-cutting", shall be used to remove larger limbs in order to avoid stripping or tearing of the bark, and to minimize unnecessary wounding.
- 6.5.3** All cuts should be made sufficiently close to the parent limb or trunk without cutting into the branch collar or leaving a protruding stub, so that closure can readily start under normal conditions.
- 6.5.4** Remove all trimmed branches and limbs from the site.
- 6.5.5** Climbing harness or aerial lift bucket may be used for tree trimming work.

6.6 Tree Removal Specifications

Where a tree is marked for removal Contractor shall:

- 6.6.1** Remove the tree without damaging any surrounding trees, utilities or structures.
- 6.6.2** Remove all trunks, treetops, branches and limbs from the site.

6.7 Stump Grinding Specifications

Where a tree is marked for stump grinding, in addition to removing the tree per the tree removal specifications in Section 8.6, Contractor shall:

- 6.7.1** Grind the remaining stump to a minimum depth of eight (8) inches from surrounding grade or deeper if necessary, to completely sever the roots from the main root mass.
- 6.7.3** All surface roots and / or raised areas from the root flare shall be ground out or leveled and filled to match the surrounding grade.

- 6.7.4 Holes where stumps have been ground out and any other areas disturbed by Contractor's activities or equipment shall be backfilled and smoothed to the level of the adjoining grade with pulverized black dirt (topsoil).
- 6.7.5 The Contractor shall supply its own topsoil for backfilling which shall be of sufficient quality to support grass cover and contain no debris (glass, sawdust, large rock etc.)
- 6.7.6 Backfilling of holes shall occur on the same day grindings are removed; otherwise the site shall be properly barricaded overnight to ensure public safety.
- 6.7.7 The topsoil shall be properly leveled and compacted to ensure minimum settlement of the backfill material.

6.8 ADDITIONAL QUOTED AND EMERGENCY TREE SERVICES

- 6.8.1 During the term of this Agreement, the County may request Contractor to quote and carry out additional tree work and/or provide emergency tree services according to the specifications provided above. Emergency service would require immediate resources.
- 6.8.2 All additional quoted and emergency work carried out by the Contractor for the County shall be provided under the terms and conditions in this Agreement.
- 6.8.3 Additional quoted and emergency tree services shall be billed by the Contractor according to the hourly rates in the Form B. Pricing Worksheet.

Special Provisions-Greenway Operations

6.9 Notification/Start of Work

- 6.9.1 Once work begins, the project will be worked continuously until completion to the best of the contractor's ability. The contractor shall notify the County of any cancellations or delays in the project schedule.
- 6.9.2 Project activity shall only occur during Mecklenburg County business hours (Monday – Friday 7:00am-5:00pm).
- 6.9.3 Contact the Greenway Operations Manager prior to making any changes to the project plan.

6.10 Project Equipment/Bridge Capacity

- 6.10.1 During initial project review, entry/egress routes will be established. When crossing a greenway bridge, concrete boardwalk or low water crossing, vehicle size and weight limit restrictions must be confirmed, and equipment to be used approved by the designated Park and Recreation representative.
- 6.10.2 **NO vehicles** are permitted to drive on/over any elevated wood boardwalk. *(Use of utility carts may be authorized by the Park and Recreation representative with prior approval.)*
- 6.10.3 When crossing the property, the contractor shall stay on the paved Greenway trail where possible.
- 6.10.4 No equipment or debris shall be stored on the property overnight.

6.11 Safety/Signage

- 6.11.1 Greenway signage (typical industry signage such as: Caution, Work Ahead) shall be posted during working hours to alert Greenway users of the Project.
- 6.11.2 When driving vehicles or equipment on the Greenway trail, contractor shall drive cautiously and at speeds no more than 10mph with 4-way flashers activated.
- 6.11.3 Contractor shall take all precautions when entering and exiting the greenway from roadways.
- 6.11.4 Contractor shall take all precautions to ensure safety of Greenway users including but not limited to, cones, caution tape, advance warning measures, etc.
- 6.11.5 At least 50% of the width of the greenway shall remain open for public use and all efforts should be made to limit greenway closure. (Short term closures are permitted when necessary for public safety, E.g. felling operations, removing limbs over greenway surface etc.)

6.12 Completion of Work

- 6.12.1 Contractor shall be responsible for cleaning the Greenway and ensuring it is restored back to original condition (prior to project commencement).
- 6.12.2 All dirt, debris, and other project materials shall be cleaned up and removed from the Property.
- 6.12.3 Contractor shall notify the County when work is complete.
- 6.12.4 Any damage to County-owned improvements, resulting from the project, shall be the contractor's sole responsibility to repair.

6.13 List of Equipment

- 6.13.2 With your submission, include a list of all available equipment.

Form A. BID/Solicitation Participation Acknowledgement

This form is to acknowledge that you are interested in participating in this project and that you have read/reviewed the County Sample Contract that will be used upon award. Submission of this form by you or your company in no way guarantees that you will be selected to receive a Contract with Mecklenburg County.

Please complete and submit this form to the email address: Meckbids@mecklenburgcountync.gov.

You/your company must follow the Solicitation requirements in order for your response to be evaluated. Thank you for your interest.

AGENCY CONTACT INFORMATION			
Name:		Phone:	
Fax:		Email:	

AGENCY INFORMATION		
Agency Name:		
Name:	Title:	
Address:		
City:	State:	Zip Code:
Business Designation (check One)		
Individual [] Sole Proprietorship [] Public Service Corp [] Partnership []		
Corporation [] Government/ Nonprofit [] LLC []		

Form B. Pricing Worksheet

Instructions: Provide detailed list of any and all expected costs or expenses related to the proposed Statement of Work.

Tree Removal

Bid for tree removal:

Daily Rate \$ _____

- Includes crew, bucket truck and chipper.
- Stump removal will soon reflect in all proposals.

Bid for tree trimming with equipment:

Hourly Rate \$ _____

Bid for tree trimming with _____ crew members

Rate per Crew Member \$ _____

Stump Removal

Stump removal is per stump unless otherwise defined.

- | | |
|-------------------------------------|---------------|
| • Stump removal up to 24 inches: | Cost \$ _____ |
| • Stump removal 25 to 36 inches: | Cost \$ _____ |
| • Stump removal 37 inches and over: | Cost \$ _____ |

Emergency Call:

Emergency call is defined as immediate service or after hours of 5PM, call backs, and weekends.

- | | |
|------------------------------------|---------------------------------|
| • Per man hour _____ Crew Members: | Minimum Call back cost \$ _____ |
| • Debris Removal: | Man hour cost \$ _____ |
| | Crew member minimum # _____ |

Special Equipment:

Most equipment used in included in tree or stump removal price.

- Crane: Cost \$ _____
- Clam Truck: Cost \$ _____
- Bolting / rigging: Cost \$ _____
- Bucket/ Chipper truck: Cost \$ _____

Traffic Control

- Traffic control Cones / Signs / Crew Hourly Rate \$ _____

Form C. Contract Exception

Instructions: Please acknowledge exception status to the County Sample Contract.

[illegible]

Form D. Addenda Receipt Confirmation

Instructions: Please acknowledge receipt of all addenda posted to [MECKProcure](#) by including this form with your Proposal.

ADDENDUM #:

DATE REVIEWED:

I certify that this proposal complies with the General and Specific Specifications and conditions issued by Mecklenburg County except as clearly marked in the attached copy.

(Please Print Name)

Date

Authorized Signature

Title

Company Name

Form E. Minority, Women, Small Business Enterprise (MWSBE)

The aspirational goals for M/W/SBE participation on this project are set at 5% MBE, 4% WBE and 5% SBE.

M/W/SBE groups are defined as follows:

1. **ABE:** Asian Business Enterprise
2. **BBE:** Black Business Enterprise
3. **HBE:** Hispanic Business Enterprise
4. **NBE:** Native American Business Enterprise
5. **SBE:** Small Business Enterprise
6. **WBE:** Women Business Enterprise
7. **DBE:** Disadvantage Business Entrepreneurs

Do you customarily subcontract portions of your Contracts and projects with the County? ☐ Yes ☐ No

Do you intend to subcontract portions of this Contract? ☐ Yes ☐ No

List any services in this proposal for which you could seek quotes from M/W/SBE groups.

1. _____
2. _____
3. _____

M/W/SBE UTILIZATION COMMITMENT

We, **Insert Vendor Name**, do certify that on the [Click or tap here to enter text.](#) we will expend a minimum of **Insert %** of the total dollar amount of the Contract with Minority Business Enterprises, **Insert %** with Women's Business Enterprises and **Insert %** with Small Business Enterprises.

Name of Company	M/W/SBE Type	Description of Work	Dollar Value

A list of certified M/W/SBE vendors by the City of Charlotte is available on their [Charlotte Business Inclusion website](#) select Find A MWSBE Certified Vendor. If you need additional firms, which offer other services, or if you have any questions, contact the M/W/SBE office at 980-314-2940.

The County reserves the right to request verification of these payments.

The County's Minority, Women, & Small Business Enterprise Program are hereby incorporated into these Specifications by reference.

The undersigned hereby certifies that the bidder has read the terms of this form and is authorized to bind the firm to the information herein set forth.

Date

Name of Company

Name, Title and Signature

Proposed Product or Service

Total Dollar Amount Bid

Form F. Vendor Company Information - Background And Experience Form

Vendor Background	
Question	Response
Vendor Identification	
Vendor Legal Name:	
Vendor Assumed or DBA Name:	
Vendor Address:	
Vendor Contact Information:	
Corporate Notes	
Ownership:	
State company ownership status <ul style="list-style-type: none"> • Business • Sole Proprietor • Partnership • Corporation • Limited Liability Corporation (LLC) • Other 	
State what city and state the company was legally formed.	
State the date the company was formed.	
Certified Partnerships:	
Identify certifications held for implementing another firm's products. Include how long the partnership or certification has been effect.	
Organization Size:	
Describe organization, including any parent companies, subsidiaries, affiliates and other related entities. <ul style="list-style-type: none"> • If a Subsidiary <ul style="list-style-type: none"> ○ # of employees of proposing company/division ○ Identify revenues of proposing company/division 	
Vendor Experience	
Customer Base:	
# of public sector clients.	
# of clients that are municipalities/counties	
# of clients served similar in size to the County	
Terminated Projects:	
List any terminated projects. Please disclose the jurisdiction and explain the reason for the termination.	
Litigation:	
List any litigation that you have been involved with during the past two (2) years regarding services provided.	
Additional Narrative Response	

Background:	
Describe company in terms of size, type of services offered, and clientele served.	
Describe track record for providing services and/or deliverables similar to the Scope of Work in the Solicitation.	
Financial Information:	
State whether the company or its parent company (if any) has ever received any sanctions or is currently under investigation by any regulatory or government body.	
Project Team:	
Describe the key individuals responsible for performing the Statement of Work services and/or deliverables. <ul style="list-style-type: none"> • Include information regarding <ul style="list-style-type: none"> ○ Experience ○ Qualifications ○ Professional certifications/licensures ○ Other information as deemed necessary 	
Project Approach:	
Describe strategy/roadmap for delivery of the Scope of Work in the Solicitation	
Provide timeline and work to be completed to meet Statement of Work proposed outcomes.	

Form G. Vendor Reference Form

Please provide the following information for three (3) customers of comparable size and scope as outlined in this Solicitation, particularly North Carolina public sector customers that the vendor has been under Contract with during the past five (5) years, as well as any additional municipality references.

References may be called at any time during the procurement process. The County will not notify Vendors before reference checks begin.

The County reserves the right to check any other reference(s) that might be indicated through the explicitly specified contacts or that result from communication with other entities involved with similar projects.

If your Bid/Proposal includes a Third-Party Provider, you must also submit a separate copy of this form for each Third-Party Provider.

REFERENCE 1:

Name of Client: _____ Phone: _____

Address: _____

Primary Contact: _____ Title: _____

Email Address: _____ Phone: _____

Service Dates: _____

Summary and Scope of Services Provided:

Client Operating Budget: \$ _____ Client # of Employees: _____

REFERENCE 2:

Name of Client: _____ Phone: _____

Address: _____

Primary Contact: _____ Title: _____

Email Address: _____ Phone: _____

Service Dates: _____

Summary and Scope of Services Provided:

Client Operating Budget: \$ _____ Client # of Employees: _____

REFERENCE 3:

Name of Client: _____ Phone: _____

Address: _____

Primary Contact: _____ Title: _____

Email Address: _____ Phone: _____

Service Dates: _____

Summary and Scope of Services Provided:

Client Operating Budget: \$ _____ Client # of Employees: _____

10/2018