



## **How to Do Business with Charlotte-Mecklenburg Schools**

**Minority, Women, and Small Business Enterprise Program  
3301 Stafford Drive  
Charlotte, NC 28208  
980-343-6856**

Dear Potential Contractors/Suppliers:

Welcome to Charlotte-Mecklenburg Schools Minority, Women, and Small Business Enterprise Program. The Charlotte-Mecklenburg Board of Education is committed to promoting full and open access to business opportunities with Charlotte-Mecklenburg Schools (CMS) by proactively seeking diverse suppliers and building relationships through a competitive process. Minority-owned, women-owned, and small business enterprises (collectively “MWSBE”) as well as other responsible vendors shall have a fair and reasonable opportunity to participate in CMS procurement process.

Suppliers and contractors are extremely important to the success of educating our students through the production, construction, and delivery of quality products to the classroom. Charlotte-Mecklenburg Schools understands that diverse businesses are essential to the economic growth of our community. The school system is committed to supporting all businesses from all segments of the region. In doing so, not only do we benefit from the goods and services provided by diverse contractors and suppliers, but also play a key role in the state’s global competitiveness.

Because your business is important to us, we are providing this booklet to serve as a source of information to all vendors and prospective bidders who ever wondered how to do business with Charlotte-Mecklenburg Schools. Interested vendors will gain a better understanding of the MWSBE Program, CMS procurement methods, how to respond to bid opportunities, certification requirements, and our Capital Improvement Program.

We hope this resource tool is helpful. If you have any questions or comments, please contact the Supplier Development Office at 980-343-6856.

Sincerely,

Tim Ivey  
Chief Operating Officer

Chiquitha Lloyd  
Executive Director of  
Engagement, Access &  
Supplier Development

Skyne Betha  
Assistant Director of  
Supplier Development

# **Minority, Women and Small Business Enterprise Program**

The MWSBE Program provides interested suppliers and contractors with the necessary tools and understanding of how to do business with the school system, available small business assistance, certification requirements, and upcoming bid opportunities. While competitive bidding remains the cornerstone of CMS purchasing procedures, the MWSBE Office proactively works to increase the participation of minority, women, and small businesses through race neutral means by:

- Providing MWSBEs equal access to opportunity for participation in CMS contracts for Construction and Repair, Goods, Professional Services, and Other Services
- Encouraging all Charlotte-Mecklenburg Schools' personnel involved in procurement and contracting activities to maintain good faith efforts and appropriate purchasing procedures
- Establishing aspirational goals of participation for MWSBE firms capable of supplying those goods and services which are necessary for school system operations
- Providing procedures for determining and monitoring MWSBE participation and compliance with MWSBE requirements stated in the Policy
- Evaluating and reporting to the Superintendent and the Board of Education the results of contract activity subject to the provisions of the MWSBE Program
- Protecting Charlotte-Mecklenburg Schools from becoming a passive participant in any unlawful discrimination
- Promoting awareness of the MWSBE Program throughout Charlotte-Mecklenburg Schools and the Community

The MWSBE Office works closely with design managers to identify packages or areas of opportunity that will enhance utilization in construction-related projects, routinely consults with Procurement Services and others regarding use of the MWSBE vendor sourcing system, participates in proposal evaluations, and reviews all bids/requisitions above \$5,000 through the CMS financial management system.

# **Charlotte-Mecklenburg Schools**

## **Procurement Procedures**

Charlotte-Mecklenburg Schools has 186 schools and numerous administrative support sites. Procurement Services is responsible for the majority of purchasing and contracts. However, each school and administrative department has the authority to purchase certain commodities and contracted services for their particular needs. Equipment, materials and supplies are procured in a variety of ways including: State Term Contracts, Informal Quotes, Formal Bids, E-Procurement and Reverse Auction. Contracted services solicitations come in the form of Request for Proposal (RFP), Request for Quote (RFQ) or Invitation to Bid (IFB).

Purchases and contracts for goods or services greater than \$90,000 (known as Formal purchases) are advertised in local newspapers, North Carolina Interactive Purchasing System (NCIPS), E-Procurement, or through direct contact (i.e. phone, fax, or email). All prospective suppliers are encouraged to register their company for opportunities on the NCIPS and E-Procurement System.

Purchases and contracts for goods or services below \$90,000 (known as Informal purchases) are not subject to public advertisements. Informal purchases or contracts can be made through direct contact (i.e. phone, fax, or email). Schools and Departments are required to seek competition for all purchases above \$5,000 and include at least one MWSBE vendor (when available). Schools and Departments may also procure and pay for goods using a procurement card in an amount not to exceed \$1,000 per individual transaction.

### **RESPONDING TO RFQs/RFPs/IFBs**

The Request for Quotation (RFQ), Request for Proposal (RFP), or Invitation for Bid (IFB) provides all the necessary instructions and a complete description of the requirement with specifications, terms, and conditions to enable the preparation of a quote/proposal/ bid.

### **Responsibility of Bidders**

Prospective suppliers should be financially sound and able to perform fully according to the specifications, delivery requirements, services and other stipulations contained in the RFQ/RFP/IFB at the price(s) bid. In cases where the contractor refuses to comply with the resultant contract, Charlotte-Mecklenburg Board of Education reserves the right to purchase on the open market and charge the contractor with any excess costs incurred.

### **Bid Requirements**

Each responding vendor is responsible for carefully reading the RFQ/RFP/IFB and understanding its contents. Vendors who have previously submitted bids for the same commodity or service should not presume that the specifications, terms, and conditions are

necessarily the same. There may be slight differences that would only be realized after carefully reading the entire bid document. Any questions related to the bid should be directed to the purchaser named in the solicitation document.

Some standard requirements include the following:

**Bid Delivery:** Bids will be received at the address cited in the RFQ/RFP/IFB on or before the date and exact time specified. The bid may not be considered for evaluation if delivered after the specified bid opening time. It is the vendor's responsibility to make sure that the bid is submitted on time and to the proper place.

**Signature:** All solicitation documents must be properly signed and executed in the designated place(s). Signature in ink is a requirement in properly executing the bid. Failure to properly execute a bid will result in that bid not being considered for award.

**Price Alterations or Withdrawal of Bid Prior to Bid Opening:** Any price corrections on bids should be individually initialed in ink. Price corrections may only be made on a bid withdrawn prior to opening. In order to make corrections or withdraw a bid, proper identification must be presented.

**Additional Information:** For those bids requiring price lists, product literature or other information, such material must be provided in accordance with the instructions outlined in the RFQ/RFP/IFB.

**Conferences/Site Inspections:** When the solicitation document stipulates a *mandatory* conference or site inspection, interested vendors *must* attend the conference or site visit at the specified place, time, and date or their bids will be automatically rejected. Such requirements are intended to supply vendors with valuable information or visual inspection, which can help to ensure the completeness and accuracy of all bids.

**Terms and Conditions:** All solicitation documents are subject to the specified terms and conditions. Please read these terms and conditions carefully. **The inclusion of any other terms and conditions by the vendor may be grounds for rejection of that bid.** Terms and conditions included as part of published price lists, catalogs, and other documents submitted as a part of the bid response are considered to be waived and will have no effect either on the bid or any contract which may be awarded. The bidder specifically agrees to the terms and conditions specified in the RFQ/RFP/IFB by signing the "execution" page.

### **Questions about the RFQ/RFP/IFB**

If you have any questions prior to submitting a bid, contact the Purchaser whose name and telephone number is on each RFQ/RFP/IFB. Once the bid opening has occurred, changes by the vendor will NOT be permitted.

## **BID EVALUATION, AWARD, PERFORMANCE, AND PAYMENT**

### **Bid Opening**

Responses to Formal Processes (i.e. IFBs, RFPs) are opened and the names of the bidders, the manufacturers and catalog number(s) of the item(s) they have offered, prices, delivery and payment terms they have submitted become public record. Responses to informal processes (i.e. RFQs) remain confidential until after an award is made, i.e. a purchase order is issued to a successful supplier.

### **Evaluation**

During the period of evaluation and prior to award, possession of bids and accompanying information is limited to Charlotte-Mecklenburg Schools personnel involved in the evaluation process. At the discretion of the appropriate purchaser, vendors may be contacted where clarification of a proposal is necessary for proper evaluation; however, in doing so, no improvement in a bidder's competitive position is permissible.

Being the "low bidder" does not necessarily mean that an award will be made to that vendor. The purpose of the evaluation process is to determine the "best buy" for the School System, taking into consideration selection criteria in the RFQ/RFP/IFB and the factors spelled out by procedure and statute. Some factors considered in addition to price are: the quality of the articles offered, the general reputation and performance capabilities of the bidders, the substantial conformity with the specifications and other conditions set forth in the request for bids, the suitability of the articles for the intended use, the personal or related services needed, the transportation charges, the date or dates of delivery, and such other factors deemed pertinent or peculiar to the purchase in question.

### **Award**

After completion of the evaluation process, recommendations of award for equipment, supplies, and materials are made by a CMS Procurement Department Official. The Procurement Official canvasses the bids before contract certifications are issued to the successful vendor(s).

### **Certification of Award and Purchase Order**

A purchase order will be issued to the successful vendor. Shipment of goods should not be made until receipt of the official Charlotte-Mecklenburg Schools purchase order, which gives shipping and invoicing instructions.

### **Review of Awards**

After contract award, unsuccessful bidders can obtain the name of the successful bidder, price, and similar basic information through written or telephone request. Requests for more detailed information can be obtained by written request or by visiting the Purchaser to review the bid file during normal business hours. Vendors are encouraged to review bid

files since much valuable information can be obtained that may be useful in future bidding situations.

### **Deliveries**

All deliveries must be **F.O.B. Charlotte-Mecklenburg Schools (applicable location)**, vendor's expense. This expense should be included as a part of the product cost, not as a separate line item.

### **Invoicing and Payment**

Unless otherwise stipulated on the purchase order or contract, all invoices should be forwarded directly to the attention of the Accounts Payable Department. Applicable North Carolina sales and use tax shall be added to the invoices as a separate line item.

## Charlotte-Mecklenburg Schools - Capital Program Services



Charlotte-Mecklenburg Schools' Capital Program Services is a partnership between Charlotte-Mecklenburg Schools and LeChase Construction Services, Inc., Jacobs Construction and RJ Leeper Construction. Capital Program Services (CPS) is the operational arm of Auxiliary Services responsible for managing all activities associated with Bond/COPs funded projects. CPS is charged with the responsibility of ensuring CMS capital projects are designed and constructed to meet CMS quality standards, adhere to codes and are delivered on time while keeping the cost within the project budgets. To date, CPS has managed more the two billion in County approved Bond/COPS funds. The Capital Program Services Department is responsible for coordinating with the Planning Department, facilitating the design, bidding, and project management for CMS' major construction and renovation projects while serving as the Owner's representative. Major projects are assigned to a project team which consists of a Project Manager (PM), Field Manager (FM), Project Controls Representative (PCR), and Supplier Development Compliance Specialist. The project team is responsible for all daily communications related to the project and ultimately the delivery of the project.



## Getting Started

### 1. **Complete a Vendor Profile**

Charlotte-Mecklenburg Schools is committed to ensuring contractors, vendors, and suppliers are aware of opportunities to do business with the school system. The Supplier Development Team shares opportunities via e-mail alert through the Contractor/Vendor database. The database stores company information including contacts and scope(s) of work/services provided by contractors to best match MWSBEs with potential CMS opportunities and opportunities provided by other agencies and businesses in the Charlotte area. In addition, company information may be shared with prime contractors, project managers, and general contractors to assist in locating contractors of specific trades and/or interest.



If you would like to receive information regarding potential contracting, outreach, and networking opportunities, please complete a Vendor Profile and return to the Supplier Development Team as soon as possible.

### 2. **Schedule a meeting with the Supplier Development Team**

The Supplier Development Team will provide any interested vendor with detailed information on how to do business with CMS including bid and/or purchasing processes, appropriate departments and contacts and where to start. Please contact one of the individuals below:

#### **Skyne Betha, Assistant Director of Supplier Development**

Charlotte Mecklenburg Schools  
3301 Stafford Drive  
Charlotte, NC 28208  
980-343-6856  
[Skyne1.betha@cms.k12.nc.us](mailto:Skyne1.betha@cms.k12.nc.us)

#### **Ayanna Washington, Supplier Development Compliance Specialist**

Charlotte-Mecklenburg Schools  
3301 Stafford Drive  
Charlotte, NC 28208  
980-343-8600  
[Ayannad.washington@cms.k12.nc.us](mailto:Ayannad.washington@cms.k12.nc.us)

#### **Michelle Fox, Supplier Development Compliance Specialist**

Charlotte-Mecklenburg Schools  
3301 Stafford Drive  
Charlotte, NC 28208  
980-343-4898  
[Michelle.fox@cms.k12.nc.us](mailto:Michelle.fox@cms.k12.nc.us)

Please note, all contractors, vendors, and suppliers are welcome to schedule an individual appointment with the Supplier Development Team. While our team is committed to the increased participation of Minority, Women, and Small Businesses on CMS projects, we are also committed to equal opportunity and assisting any and all businesses interested in doing business with the school system.

### 3. **MWSBE Program Goals and Guidelines**

CMS is dedicated to providing Minority, Women, and Small Businesses equal access to opportunity for participation in Capital Improvement Projects (additions, renovations, and new construction), procurement, professional services, and system-wide purchasing contracts. Aspirational goals have been set by the school system for MWSBE firms capable of supplying goods and services which are necessary for school systems operations as follows:

Category	MBE Goal	WBE Goal	SBE Goal	Total M/W/SBE Goal
Construction	10%	6%	5%	21%
Architecture & Engineering	4%	7%	5%	16%
Professional Services	9%	9%	5%	23%
Other Services (other than Architecture & Engineering and other Professional Services)	5%	4%	5%	14%
Goods	3%	3%	5%	11%

### 4. **MWSBE Certification**

So that our reporting may accurately and definitively reflect the participation of MWSBEs on our projects, only those minority, women, and small businesses which have been certified by a bona fide agency as such will be credited towards the MWSBE participation for CMS contracts.

**Persons seeking certification must meet certain criteria:**

**MWSBE Certification applies to:**

A minority-owned business that is owned, operated, and controlled by one or more minority group members who have at least 51% ownership, operational and managerial control, interest in capital, earnings commensurate with their percentage of ownership and continuing not created solely to meet the MWBE requirements.

A minority is a citizen or lawful permanent resident of the United States and who is:

- a. African American
- b. Hispanic / Latino American

- c. Asian American
- d. Native American

A woman-owned business that owned, operated, and controlled by one (1) or more non-minority women that does not have origins in any of the groups listed under minority who have 51% ownership, interest in capital, earnings commensurate with their percentage of ownership and continuing not created solely to meet the MWBE requirements.

#### **SBE Certification applies to:**

A business enterprise owned, operated and controlled by one (1) or more eligible owners who have 51% ownership, interest, holds the professional or contractor license necessary for operation, and is 25% or less of the applicable size standards established by the Small Business Administration.

SBE certification also includes a personal net worth limitation, a minimum of three months in business, and location within the Charlotte Metropolitan Statistical Area (MSA).

If your firm is minority-owned, woman-owned, or is a small business interested in becoming certified in order to be counted towards MWSBE participation, you may want to visit the following links for more information regarding MWSBE Certification:

- For SBE Certification with the City of Charlotte: [Charlotte Business Inclusion](#)
- For MWBE or HUB Certification with the North Carolina Department of Administration: [NC HUB Certification](#)
- For MBE Certification with the Carolinas-Virginia Minority Supplier Development Council: <http://cvmsdc.org>
- For WBE Certification with the Women's Business Enterprise National Council – <https://www.wbenc.org/certification/>

#### **5. Market Your Company**

- Prepare a marketing/informational packet or capability statement about your company. Companies or agencies with whom you are interested in doing business will use the information to learn about your company and the goods or services you provide.
- If you are a subcontractor or supplier interested in doing business with General Contractors (GCs), get to know the GCs who typically bid school projects!! A list of the GCs who typically bid CMS construction projects can be obtained from the Supplier Diversity Team.
- Some GCs may require interested subs to complete a pre-qualification/contractor information form prior to accepting bids. Be sure to contact the GCs and inquire about how they do business with subcontractors and respond accordingly.
- Get involved with community organizations, outreach, networking, and informational sessions hosted by various groups in the construction industry with similar programs and objectives such as:
  - Central Piedmont Community College (CPCC)
  - Charlotte Area Transit Systems (CATS)

- City of Charlotte
- Hispanic Contractors Association of the Carolinas (HCAC)
- Inlivan (formerly Charlotte Housing Authority)
- Mecklenburg County
- Metrolina Minority Contractors Association (MMCA)
- North Carolina Department of Transportation (NC DOT)
- University of North Carolina at Charlotte (UNCC)

From time to time, CMS may forward information to contractors in our database regarding activities sponsored by the above-mentioned agencies and more.

### **The Bidding Process:**

#### **Before the bid:**

- **Get to know the GC's that typically bid with CMS:** Charlotte-Mecklenburg Schools uses the CM-at-Risk bid method for most large construction and renovation projects. Contractors interested in bidding as a subcontractor should familiarize themselves with the General Contractors (GCs) who typically bid CMS projects prior to bids. Subcontractors are encouraged to make contact with GCs, inform them of your interest to bid on future CMS projects, and inquire about doing business with them, not only on CMS projects but any other projects that you may be interested in and capable of doing. Building relationships is key to doing business!!
- **Look for Advertisements for Bids:** Charlotte-Mecklenburg Schools advertises upcoming opportunities with, but not limited to the following publications:
  - BID ALERTS (by e-mail to those in our database)
  - Greater Diversity News
  - Que Pasa Newspaper
  - The Charlotte Observer
  - [CMS Website](#)
  - [NC Electronic Vendor Portal](#)
- **Attend the Pre-Bid Meetings!!!:** Contractors interested in bidding jobs with CMS are strongly encouraged to attend the pre-bid meetings to learn more about the project. It is your best opportunity to ask questions about specific projects. The pre-bid meeting is also opportunity to meet, network, and get to know the GCs and other primes and subs bidding the project.
- **RESPOND to Requests for Bids:** Shortly after the pre-bid meeting, the CM-at-Risk for the CMS construction project will send out an electronic notification which will include a list of the pre-bid meeting attendees. It is imperative that you respond to the GCs and inform them of your intent to bid/not bid the project. Not responding may get your name removed from lists to be contacted for future opportunities! Even if you do not plan to bid, you are encouraged to respond so that you may stay in the loop for future opportunities.
- **GC's and major primes with subcontracting opportunities** are reminded of the MWSBE program goals and guidelines for CMS projects (10% MBE, 6%WBE, and 5%SBE) and should be contacting

MWSBE subcontractors for opportunities with their firm. The Supplier Development Team will assist any and all contractors in search of MWSBE subcontractors of various trades. Contractors who fail to meet the MWSBE goals and guidelines and do not seek the assistance of the Supplier Development Team may be found non-compliant as it relates to making “good faith efforts” to utilize MWSBE’s on CMS projects.

- **MWSBE’s** should familiarize themselves with the **Good Faith Efforts** with which the GCs bidding CMS projects are required to comply. As an MWSBE bidding to a GC as a subcontractor, there may be a “good faith effort” that could increase your ability to be more competitive and better able to do business with a GCs based on items offered in good faith to work with small businesses. A copy of the Good Faith Efforts list can be found in the Appendix of this manual.
- **Submit your bid on-time!!!:** Please make yourself aware of the bid date!!! Most GCs require bids from subcontractors to be submitted prior to the bid date. Be sure your bid is clear, complete, accounts for all addenda, and in a readable format. You may also want to double check with the GCs to be sure you are bidding correctly. For example, you will need to know if they are accepting lump sum and/or unit price bids.

#### **After the Bid**

- **Contact the CM-at-Risk or Supplier Development Team** to find out who is the apparent low bidder. MWSBEs should also inquire as to whether their name was listed by the apparent low bidder and/or any other GC that bid the project on the MWSBE Identification form submitted with each bid. Please note, all MWSBE subcontractors are not always known right at the time of bid and may be listed later in the project.
- **Follow-up with the GCs to whom you submit bids.** To find out where your bid stands with a GC, contact that GC directly. The apparent low bidder may refrain from speaking in too much detail with subcontractors until after they have been officially awarded the project by way of approval by the CMS Board of Education. If you are the low bidder as a subcontractor with a prime contractor, negotiations regarding your subcontract are strictly between your company and that prime contractor.

#### **ALWAYS...**

- **KEEP BIDDING!!!** Do not be discouraged and stop bidding just because you are not the low bidder. Keep bidding jobs and familiarizing yourself with the GCs, your competition, and stay abreast of where the market is and find your niche.
- **Follow up with the GC’s to whom you submit bids** and let them know if you intend to continue bidding to their company and or find out what they might recommend you do in an effort to be better able to do business with them.
- **Keep a bid log** of all the projects you bid to find room for improvement, error, to keep up with the market, etc.

- **DO YOUR BEST WORK!!!** Remember - with each of your jobs and contacts you are building a reputation and a resume. First impressions are lasting impressions and building relationships is key.
- **Keep in Contact with the Supplier Development Team.** The Supplier Development Team is here to assist any and all contractors in their efforts to do business with Charlotte-Mecklenburg Schools and provide you with valuable assistance and guidance. Make sure the team is aware of your continued interest in doing business with CMS, any changes to your company contact information and/or scopes of work.

### **Informal Construction and Renovation Opportunities:**

For smaller construction and renovation projects falling below the \$500,000 threshold, Charlotte-Mecklenburg Schools may elect to bid out informally. In this case, contractors are sought out based on the scope of work and invited to bid. It is, therefore, important that CMS is familiar with your company, has your most current contact information, and is aware of all scopes of works, special licenses, etc. MWSBE Goals and Guidelines will be enforced on all informal construction and renovation opportunities above \$5,000.

Informal bidding on construction and renovation projects may be facilitated and/or managed by other departments besides Capital Program Services, such as the Facilities Maintenance Department and/or smaller departments within.

### **Professional Services – RFP's and RFQ's:**

Professional services for Charlotte-Mecklenburg Schools such as Architectural, Engineering, Special Inspections and Testing is procured by way of RFP (Request for Proposals) or RFQ (Request for Qualifications). Again, it is imperative the CMS has current company information and is aware of the service you provide!! All RFP's and RFQ's are also advertised in The Charlotte Observer. E-mailed BID ALERTS may also be sent out regarding RFP's and RFQ's. MWSBE Goals and Guidelines have been set and are enforced on all Professional Services contracts.