

Every Child. Every Day. For a Better Tomorrow.

How to do Business with Charlotte-Mecklenburg Schools

Office of Minority, Women, and Small Business Enterprise Program
3301 Stafford Drive
Charlotte, NC 28208
980-343-8638



Objectives

- To understand CMS Bid Process and Delivery Methods
- To become familiar with CMS MWSBE Program Goals and Guidelines
- To identify the types of informal/formal opportunities available

Small Order Purchases

- P-Card Purchases (Up to \$1,000)
- Limited Purchase Orders and Check Request for purchases of Supplies and Materials (Less than \$5,000)

Informal Bids

Apparatus, Supplies, Materials, and Equipment (\$5,000 to \$89,999 not on State Term Contract)

- Requires a minimum of three quotes for obtaining competition when available
- Notification of at least one available MWSBE vendors of the opportunity is required
- Phone, Fax or Email is permitted
- All requisitions above \$5,000 are reviewed and approved by the MWSBE Administrator through the Lawson system
- Non-compliance of MWSBE notification procedures can result in rejection of the requisition and additional solicitations may be required

Formal Bids
Apparatus, Supplies, Materials, and Equipment
(\$90,000 and Greater)

- All formal solicitations and documentation shall be performed by Procurement Services
- Notification of at least one available M/W/SBE vendor is required

Contracted Services (non-construction related)

- Competitive procedures are not required for service contracts less than \$5,000; however, rotating awards to multiple vendors, including MWSBE vendors is recommended
- Service contracts greater than or equal to \$5,000 will follow specific procedures determined collectively in advance by the Purchasing Department, submitting department and MWSBE Department on a case by case basis
- Request for Proposal (RFP), Request for Quote (RFQ), or Invitation to Bid (IFB)

Informal Construction (\$5,000 to \$499,999)

- Informal bids are recommended, but not required, for construction or repair work costing less than \$5,000
- Require a minimum of three quotes for obtaining competition when available
- Notification of at least one available MWSBE vendor of the opportunity is required
- Good Faith Efforts documentation of contractors solicited and efforts to recruit MWSBE participation is required
- All requisitions above \$5,000 shall be reviewed and approved by the MWSBE Administrator
- Non-compliance of M/W/SBE notification procedures can result in rejection of the requisition and additional solicitations may be required

Formal Construction & Repair (\$500,000 and up)

- Formal bids are required by and in accordance with state law
- Notification of available MWSBE vendors is required
- Bidders required to complete good faith efforts to include MWSBE subcontractors in accordance with state law
- All bids and Good Faith Efforts are reviewed and approved by the MWSBE Office
- Non-compliance of MWSBE rules and guidelines can result in rejection of the bid

Professional Services
(including Surveying, Architecture & Engineering)

- Qualification Based
- Notification of available MWSBE service providers is required
- Responders are required to complete good faith efforts to include MWSBE sub-consultants in accordance with state law
- All proposals are reviewed and approved by the MWSBE Office

Minority, Women, and Small Business Enterprise Program Goals and Guidelines

MWSBE Program

The MWSBE Office proactively works to increase the participation of minority, women and small businesses through inclusive procurement activities.

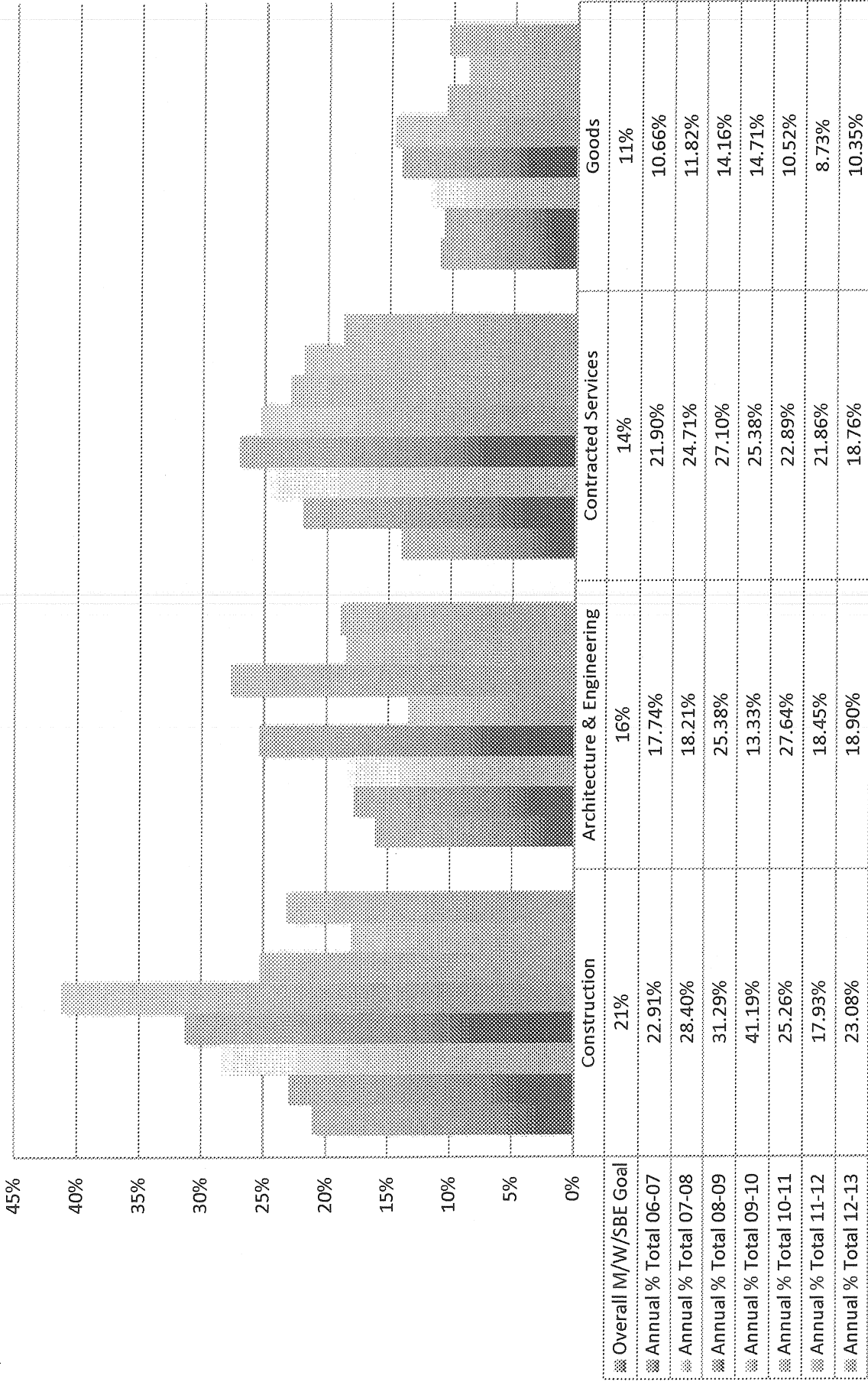
Success is measured using the following program objectives:

- Outreach
- Certification
- Utilization
- Monitoring and reporting
- Training and technical assistance

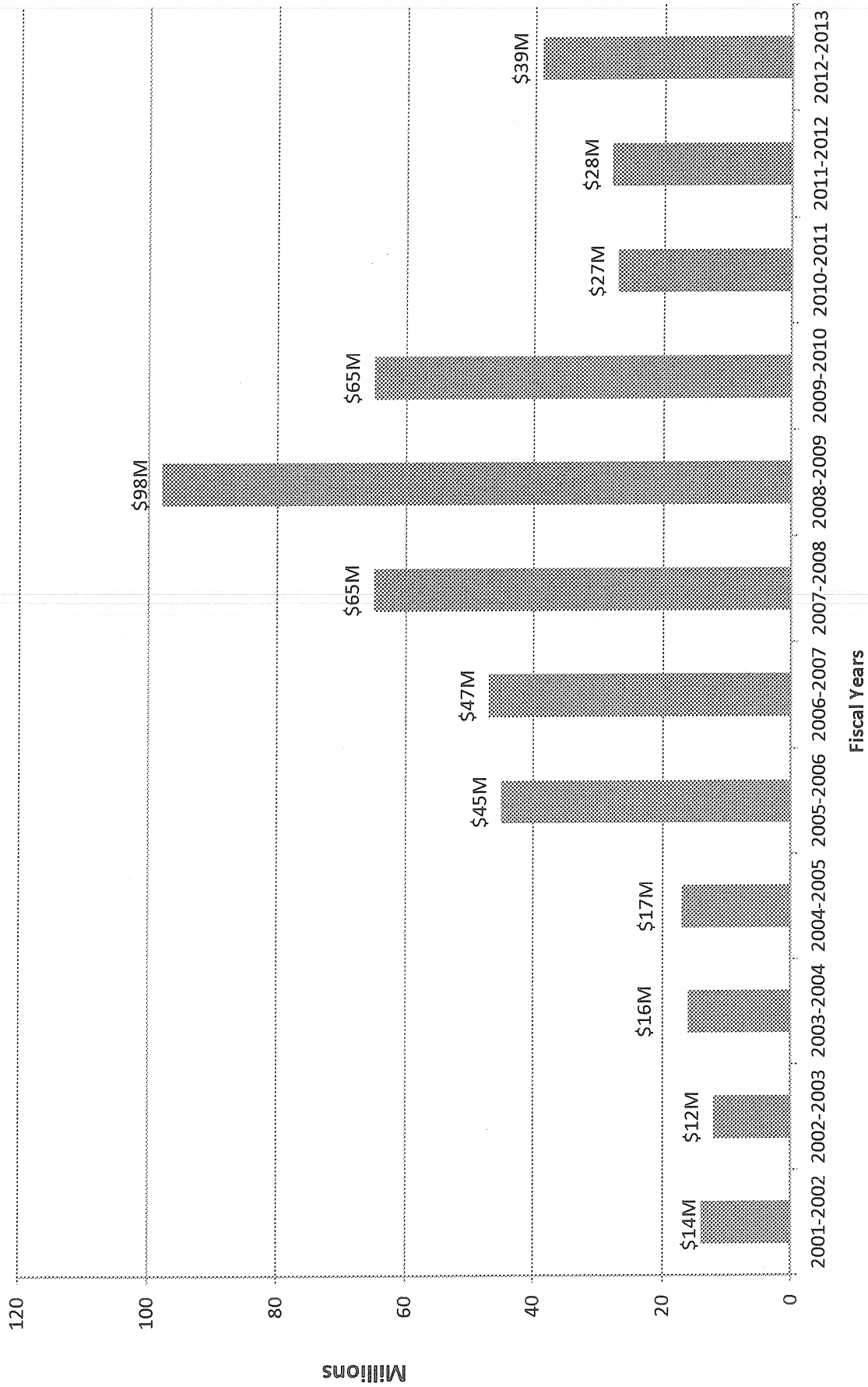
Aspirational Goals

Category	MBE Goal	WBE Goal	SBE Goal	M/W/SBE Goal
Construction	10%	6%	5%	21%
Architecture, engineering and surveying	4%	7%	5%	16%
Contracted services (other than construction)	5%	4%	5%	14%
Goods	3%	3%	5%	11%

Overall MWSBE Utilization FY 2012-2013

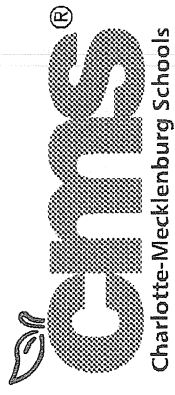


Overall MWSBE Spend



Accomplishments

- Increased overall spend with MWSBEs by \$11.2 million over previous fiscal year
 - WBES - \$7.7 million
 - MBES - \$4.7 million
- Awarded first joint venture Construction Manager at-risk project to DH Griffin/Metcon Construction (Native American firm)



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