CBRE Heery Evaluation Tool

1. Staffing

    a. Meeting staffing schedule. Based on staffing plan in the latest amendment.

        1. Compare current staffing to plan. Show %.

        2. Under 70% staffed = red

        3. Between 70%-90% = yellow

        4. Above 90% = green

    ### Score – Used 74% Planned Hours ⬤

    b. Adhering to staffing budget

        1. Compare staffing budget to plan. Show %.

        2. Above 120% = red

        3. Between 101%-120% = yellow

        4. 100% or less = green

    ### Score – Spent 60% Budgeted Amount ⬤

    c. Providing experts that add to team

        1. Chief Operations Officer review staff resumes to ensure individual skill sets match the position.

        2. Under 70% of skills required are being met = red

        3. Between 70%-90% of skills are being met = yellow

        4. Above 90% of all skill requirements = green

    ### Score – > 90% ⬤

    d. Professionalism

        1. Survey BCSD staff (1 senior staff, 1 Operations\Technology staff, 1 Principal working with CBRE Heery), CLOC members, and board members. Rate on scale of 1-5.

        2. Average score under 2.0 = red

        3. Average score from 2.0 - 4.0 = yellow

        4. Average score above 4.0 = green

    ### Score – 4.17 ⬤

    e. Relationship with District

        1. Survey BCSD staff (1 senior staff, 1 Operations\Technology staff, 1 Principal working with CBRE Heery), CLOC members, and board members. Rate on scale of 1-5.

        2. Average score under 2.0 = red

3. Average score from 2.0 - 4.0 = yellow

4. Average score above 4.0 = green

Score – 4.33 🟢

f. MWBE Participation

1. Compare MWBE staffing to approved staffing plan.

2. Under 70% of MWBE goal staffed = red

3. Between 70%-90% of MWBE goal = yellow

4. Above 90% of MWBE goal = green

Score – 4 (38.3% exceeds BCSD 20% goal) 🟢

2. Project Management – Review of project performance of projects managed by CBRE Heery.

a. Community Involvement

1. Survey BCSD staff (1 senior staff, 1 Operations\Technology staff, 1 Principal working with CBRE Heery), CLOC members, and board members. Rate on scale of 1-5.

2. Average score under 2.0 = red

3. Average score from 2.0 - 4.0 = yellow

4. Average score above 4.0 = green

Score – 4.0 🟡

b. Managing schedule (start/completion/close out)

1. What percentage of projects managed are on time?

2. Under 70% of projects on schedule = red

3. Between 70%-90% of projects on schedule = yellow.

4. Above 90% of projects on schedule = green

Score - > 90% 🟢

c. Managing budget (Value add/Change orders/Amendments)

1. What percentage of projects managed are on budget?

2. Above 120% = red

3. Between 101%-120% = yellow

4. 100% or less = green

Score - < 100% (Based on GMP budgets) 🟢

d. Dispute Resolution

1. Are there any contractor and/or architect disputes with the Owner? How long has it been active? Does it appear to be close to resolution?

2. Disputes/Greater than 3 months active/No resolution in sight = red

3. Possible dispute/Under 3 months active/ Possible resolution = yellow

4. No disputes/No longer active/Finalizing resolution = green

Score – 4 🟢

e. Safety

1. Survey BCSD staff (1 senior staff, 1 Operations\Technology staff, 1 Principal working with CBRE Heery), CLOC members, and board members. Rate on scale of 1-5.

2. Average score under 2.0 = red

3. Average score from 2.0 - 4.0 = yellow

4. Average score above 4.0 = green

Score - 4.0 🟡

f. Construction Phasing

1. Survey BCSD staff (1 senior staff, 1 Operations\Technology staff, 1 Principal working with CBRE Heery), CLOC members, and board members. Rate on scale of 1-5.

2. Average score under 2.0 = red

3. Average score from 2.0 - 4.0 = yellow

4. Average score above 4.0 = green

Score – 4.5 🟢

g. Quality Control

1. Survey BCSD staff (1 senior staff, 1 Operations\Technology staff, 1 Principal working with CBRE Heery), CLOC members, and board members. Rate on scale of 1-5.

2. Average score under 2.0 = red

3. Average score from 2.0 - 4.0 = yellow

4. Average score above 4.0 = green

Score – 4.0 🟡

3. Referendum Management-

a. Public Opinion

NA this survey period

b. CLOC Opinion

1. Survey of CLOC members

2. Average score under 2.0 = red

3. Average score from 2.0 - 4.0 = yellow

4. Average score above 4.0 = green

Score – 4.5 🟢

c. Board Opinion (Operations Committee)

1. Survey of Operations Committee members

2. Average score under 2.0 = red

3. Average score from 2.0 - 4.0 = yellow

4. Average score above 4.0 = green

No surveys received from Board members

d. Quality of Information

1. Survey BCSD staff (1 senior staff, 1 Operations\Technology staff, 1 Principal working with CBRE Heery), CLOC members, and board members. Rate on scale of 1-5.

2. Average score under 2.0 = red

3. Average score from 2.0 - 4.0 = yellow

4. Average score above 4.0 = green

Score - 4.67 🟢

e. Standards

1. Survey BCSD staff (1 senior staff, 1 Operations\Technology staff, 1 Principal working with CBRE Heery), CLOC members, and board members. Rate on scale of 1-5.

2. Average score under 2.0 = red

3. Average score from 2.0 - 4.0 = yellow

4. Average score above 4.0 = green

Score – 4.0 🟡

f. Management Plan

1. Survey BCSD staff (1 senior staff, 1 Operations\Technology staff, 1 Principal working with CBRE Heery), CLOC members, and board members. Rate on scale of 1-5.

2. Average score under 2.0 = red

3. Average score from 2.0 - 4.0 = yellow

4. Average score above 4.0 = green

Score – 4.2 🟢

g. Website

    1. Survey BCSD staff (1 senior staff, 1 Operations\Technology staff, 1 Principal working with CBRE Heery), CLOC members, and board members. Rate on scale of 1-5.

    2. Average score under 2.0 = red

    3. Average score from 2.0 - 4.0 = yellow

    4. Average score above 4.0 = green

Score – 4.33 🟢

CBRE Heery Performance Review

Name: Position:

Performance review items that do not name CBRE Heery in question may not fall entirely under scope of CBRE Heery. These questions have been added to investigate the need for adding services to the CBRE Heery contract.

Please rate CBRE Heery on the following statements on a scale from 1-5.
1 indicates that you strongly disagree.
5 indicates that you strongly agree.
N/A if no opinion or unable to answer.

1. CBRE Heery personnel uphold a standard of professionalism in the work place.

2. CBRE Heery personnel work well with BCSD personnel.

3. If a project has community involvement, CBRE Heery has been actively engaged in the community involvement portion of the project.

4. The construction projects are safe.

5. For those projects with a phased construction plan, I feel that the project phasing was well organized and executed.

6. If a project has a phasing plan, CBRE Heery has been actively engaged in the development and/or implementation of the construction phasing plan.

7. CBRE Heery ensures all projects have met all quality standards.

8. Rate CBRE Heery performance on a scale from 1-5 with 5 being the highest.

9. I receive quality information from CBRE Heery personnel.

10. I feel that all Beaufort County construction projects are built according to the same standards.

11. CBRE Heery has developed a management plan that is being properly executed.

12. The Referendum section of the BCSD website is being kept current and is a good source for referendum information