



Facilities Planning and  
Development Division

**REQUEST FOR  
STATEMENTS OF QUALIFICATIONS  
FOR  
COMMISSIONING SERVICES  
FOR  
PROJECT NO. 9557660  
Central Utility Plant Expansion**

**APRIL 16, 2023**

**UC DAVIS HEALTH  
FACILITIES PLANNING & DEVELOPMENT  
4800 2<sup>ND</sup> AVENUE, SUITE 3010  
SACRAMENTO, CA 95817  
[HEALTH.UCDAVIS.EDU/FACILITIES/](http://HEALTH.UCDAVIS.EDU/FACILITIES/)**

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## ATTACHMENTS

Attachment A – Consultant Statement of Qualifications Form

Attachment B – Rate Sheet

Attachment C – University of California Professional Services Agreement – Blanket (Sample)

## **PROJECT BACKGROUND:**

The UC Davis Medical Center, located in Sacramento, has a 50-year history of providing high-quality patient care across the greater Sacramento region and the 33 counties it serves. UC Davis Medical Center's 142-acre campus is served by central heating and cooling plant ("Central Plant") built in 1998 and is nearly at its utility capacity and requires an upgrade.

Starting in 2019, UC Davis Health undertook a comprehensive utilities master planning effort to outline the infrastructure and facilities needed to address future healthcare, education, research, and teaching needs on the Sacramento Campus and in the greater Sacramento region. The Utility Master Planning Team identified a critical need for UC Davis Health to upgrade utility services and expand the infrastructure to support current and upcoming utility operations.

The CUP Expansion addresses the utility requirements for the new buildings at UC Davis Health's main campus. The upgrade and expansion is currently a baseline program of 40,000 (gsf) new annex building and 9,000 (gsf) renovations within the existing Central Utility Plant, Department of Health Care Access and Information (HCAI) Level-1 utility space, diesel generators, electrical rooms and administrative support space to facilitate campus operations. This project will support the California Tower and other projects with site and building utility infrastructure upgrades that will be both HCAI and Non-HCAI scopes of work.

The CUP Expansion will be delivered using the Progressive Design-Build Approach, which emphasizes integrated project delivery processes. This will require intensive and close collaboration between the Progressive Design-Builder (PDB), the Architect, all consultants, UC Davis Health staff, HCAI, the Campus Fire Marshal, design-build and design-assist trade contractors, all other subcontractors, and other project participants. The CUP Expansion project will require all major members of the Commissioning Team to be co-located in the Big Room for all phases of the project.

All work included in this bid package will be performed under the authority and jurisdiction of UC Davis Health and HCAI. The Commissioning Agent will be contracted directly with the University.

## **PROJECT DESCRIPTION:**

Project Delivery Method: Progressive Design-Build

Estimated Construction Cost: \$193M

Estimated BGSF: 49,000 GSF

Estimated Project Duration: 84 Months

## **PROJECT SCHEDULE:**

Following is the University timeframe for the CUP expansion project. Assumptions include phased approvals, overlapping packages, incremental review and approval with both University Plan Review and HCAI review.

Phase 1: Program validation, Schematic and Design Development Documents (ending January 2024)

Phase 2: Construction Documents & Approvals (ending January 2025)

Phase 3: Construction (2025-2029)  
Completion: Q1 2029

Phase 4: Post-Occupancy Monitoring Based Commissioning (2029-2031)  
Completion: Q1 2031

### **PROFESSIONAL SERVICES REQUESTED:**

This selection process will identify the most qualified firm to provide the UC Davis Health CUPx project with Commissioning (Cx) and Monitoring Based Commissioning (MBCx) Services. The University expects the Proposer to adequately staff the Project with fully qualified commissioning staff as the job demands.

The Commissioning (Cx) Agent shall perform services in accordance with the Contract Documents, Title 24 of the California Code of Regulations (as amended), Design, and Construction of Buildings under HCAI Jurisdiction, LEED, the University of California Office of the President Green Building Sustainability Goals, and all applicable State and local codes and regulations and shall furnish all material, labor, equipment, and tools.

These services will include, but are not limited to:

#### Design Phases

- A. Establish and document the Owner's Operational Criteria (OPC) and goals for system function, performance, and maintainability.
- B. Formulate and communicate a design phase Cx plan outlining key schedule dates, attendees required at each meeting, and responsibilities of all parties.
- C. Review and develop OPC document to be consistent with applicable codes, long-term maintainability goals, UC Davis Campus Standards and energy usage goals.
- D. Conduct and document a comprehensive review of design documents and specifications for compliance with OPRs, applicable codes, long-term maintainability goals, MBCx metering needs, Campus Standards and energy or utility usages goals at 100% Design Development, 100% Construction Documents, and Bid (permitted) documents.
- E. Review electrical, mechanical and plumbing, emergency power and UPS, building management and other equipment selections in collaboration with PDB and Owner, including calculations, installation specifications, and all other applicable items.
- F. Peer Review: The Cx Agent shall review plans and specifications to ensure that owner's sustainability goals are met and provide enhanced commissioning submission/certification at 100% Design Development, 50% Construction Documents and 100% Construction Documents.
- G. Provide and communicate peer review comments at each milestone (see F above), and ensure follow-up to all comments in subsequent design milestones.
- H. Develop commissioning specifications and MBCx plan, subject to review and approval by Owner and Progressive Design-Build project team, for inclusion in the Design Development set.
- I. Controls: Conduct controls design meetings to review and formulate the controls scope and sequence of operations with the Owner, Owner's Representative, Progressive Design Builder, and Architect of Record.
- J. Meetings: The Cx Agent shall attend meetings with the University's Representative, the Architect, and the Progressive Design-Builder as required.

#### Construction Phase

- A. Construction Phase Commissioning (Cx) Plan: Formulate a construction phase Cx plan in advance of construction start outlining key schedule dates, attendees required at each meeting, and responsibilities of all parties
- B. Commissioning Meetings: Facilitate a commissioning kick-off meeting with the project team, including the Owner's maintenance representative, Progressive Design-Builder and relevant Trade Partners. At a minimum, the meeting should discuss the following:
  - a. Cx team members and their roles and responsibilities
  - b. Present Cx plan for the construction phase
  - c. Present key Cx milestones and approximate dates for installation reviews, commencement and duration of functional tests
  - d. Involvement of Cx in the Submittal and RFI review process
  - e. Subsequent Cx meetings and discussion topics
- C. Schedule Review: Review the Construction Schedule to ensure commissioning plan activities have been adequately incorporated (including network connection to historian servers) and provide comments to the Owner and Progressive Design-Builder.
- D. Submittal & RFI Review: Review all Controls and commissioned equipment submittals including O&M manuals. Provide and track review comments until all are resolved. Notify Owner of any missing submittal items. Review and respond to relevant RFIs from the Progressive Design-Builder team.
- E. Pre-Functional Test Scripts: Prepare pre-functional test checklists for use by the Trade Partners during start-up. Checklists will be reviewed and approved by Owner and Progressive Design Build team prior to disseminating to Trade Partners.
- F. Master Issues Log: Maintain a master issues log throughout construction (inclusive of submittals, RFIs, field observations, function testing items, etc.) Distribute the log at regular intervals and review at every Cx meeting.
- G. Functional Testing: Cx Agent to witness functional testing on site for all commissioned systems. Inform Owner of all functional testing dates so the Owner may exercise the option to attend. Document results in site reports and track items that require resolution in the master issues log.
- H. Commissioning of Systems: The following systems will require commissioning:
  - a. Heating, Ventilating and Air Conditioning (HVAC)
  - b. Building/Energy Management System (BMS/EMS)
  - c. Lighting Systems & Controls
  - d. Domestic Hot Water Systems
  - e. Irrigation Systems, as needed
  - f. Emergency Power Systems (EPS) as needed (Russell, any concerns?)
  - g. Electrical System
  - h. Fire/Life Safety
  - i. Security Systems
  - j. Plant controls (Russell, comments?)
- I. Meter verification for MBCx phase
  - a. Necessary utility meters are installed to support energy use intensity (EUI) verification.
  - b. 100% of utility meters are calibrated and communicating to central servers. At least 20% of the calibration shall be validated by the CxA.
  - c. Values are shown on central servers match meter values and are trended at no more than 15-minute interval and saved for at least 3 years.

- J. Field Observation: coordinate site visit timing with the Owner and Progressive Design-Builder to maximize effectiveness. After each visit, the Cx Agent shall provide written report detailing observations and noting any deficiencies. Not sure what a site inspection visit is. Cx will be on site frequently to witness functional test, etc.
- K. Systems Manual: Review O&M manuals from the Trade Partners for content and completeness. Include these into a system manual for the operation of commissioned systems. The systems manual should also include as-built sequences and set-points, troubleshooting recommendations and maintenance requirements. Systems manual shall include graphics, screenshots or video to illustrate the contents better.
- L. Trending: Gather and analyze trend data for one month after Occupancy. Log and notify Owner of any performance or data quality issues.. Meet monthly or quarterly with Owner's maintenance representative to review issues and submit a warranties issues report no later than 2 months prior to warranty expiration.
- M. Transition & Training: Review the Progressive Design Builder's training schedule to ensure all trainings are included and verify that the training sessions are adequate. This may entail a review of the materials to be distributed or attending the training session.

#### Post-Occupancy Phase (24-months)

- N. Final Commissioning Report: Provide final report that includes summary of the entire process, outstanding items and recommendations for future work. The Owner may also request a training session to provide lessons learned, results of all functional testing and operational fundamentals if the commissioned systems.
- O. MBCx Plan Implementation Setup (1-3 months): The MBCx Implementation Setup Period occurs post-construction and after completion of Cx activities while the operation of the building falls into steady rhythm. During this period, periodic checks (monthly and quarterly) shall be performed to evaluate how closely the operational energy use matches the Baseline EUI predictions from the energy model. Also included in this setup period is the implementation and tuning of the fault detection monitoring system (SkySpark).
- P. MBCx Reporting Period (3-24 months): Meet monthly or quarterly, as agreed by the team, with the Owner's maintenance representative to review performance issues as they affect the operation of the equipment and the building EUI. Report building EUI at end of 1<sup>st</sup> and 2<sup>nd</sup> year of operation.

#### **SUBMITTAL REQUIREMENTS:**

Please address all of the items noted in this section in your Qualifications submittal. Failure to do so will result in your submittal not being considered. Qualifications will be evaluated based on demonstration of meeting the requirements of this RFQ.

1. Cover Letter and Organization Introduction: Please submit general statements about the organization's qualifications for the services described in the RFQ. Include at least the following:
  - a. Firm name, business address, telephone, email address, website address and fax numbers
  - b. Location of main office and the local office which will serve the project
  - c. Key personnel and professional registrations
  - d. Current staff size
  - e. Current assignments of proposed staff
  - f. Previous experience with University of California system, UC Davis Health, and HCAI Type 1 and Type 3 projects. HCAI 1 project experience is preferred.

2. Technical Approach: Demonstrated expertise in designing and executing complex projects with special inspection requirements. Describe the firm's planned approach to the project, and an understanding of Design-Build and Lean Principles. Examples of required deliverables listed in this RFQ that exemplify the firm's methodology and planning approach.
3. Relevant Project Experience: Provide descriptions of three projects that have been executed within the past ten years by the firm. The projects described shall be similar in scope and complexity to key elements of the project. Please include at least the following information:
  - a. Project name
  - b. Project owner with current address and telephone number
  - c. Project size (square feet)
  - d. Construction value
  - e. Design duration
  - f. Construction duration
  - g. Year of Completion
  - h. Project delivery approach
  - i. Consultant's role on the project
  - j. Consultant's years of involvement
  - k. Type of facility
  - l. Project description
4. Key Personnel: Please list all personnel proposed for the project and identify the proposed Project Manager and main point of contact for this project. Provide resumes for all proposed personnel, to include, at a minimum, the following information:
  - a. Full name, position in the firm, years with the firm and office location
  - b. Education (list all degrees and institutions), CA licenses and affiliations
  - c. Project role and responsibilities
  - d. Relevant project experience (HCAI 1 project experience is preferred for key personnel)
5. Document your firm's willingness to accept the contract language in the University's Professional Service Agreement (PSA) including indemnification and insurance requirements.
6. Provide, on the Consultant Rate Sheet (Attachment A) hour rates for professional and non-professional personnel and an annual escalation rate through project completion.

References: Provide a minimum of 3 references (for your proposed main point of contact) within the company from Architects, Contractors, or Owners. Also provide references for the company.

Professional (Errors & Omissions) liability insurance will be required, with a minimum limit of \$2,000,000 per occurrence and \$4,000,000 in aggregate.

Qualified applicants will demonstrate proven experience in providing inspection services in California on a range of project types including healthcare, both inpatient and outpatient. Specialty expertise will also be required for healthcare on a UC campus, complex underground utilities, and California HCAI Type 1 experience.

Statements of qualifications shall be as brief and concise as possible. Please indicate lead in-house person. Provide attachments as appropriate to respond directly to the screening criteria. Submittal should be specifically tailored to this project. Please submit the contact information for (3) references, references should be from an Owner, Owner's Representative, Contractors, or Design Teams. "Boiler Plate" or generic pages are not desired. All material should be in 8 1/2" x 11" format.

**ONE (1)** electronic copy of the information requested must be received by **4 p.m. on May 13, 2024** at the link to be provided by UC Davis Health. All qualifications submittals will be received electronically --- no hard copies will be accepted.

Firms interested in responding to this RFQ must notify UCDH by May 10, 2024, to be provided a link to upload their Qualifications package.

Questions and requests for the upload link should be directed via email to Leila Couceiro, Contracts Manager at [lcouceiro@ucdavis.edu](mailto:lcouceiro@ucdavis.edu)

**SCREENING CRITERIA:**

1. **General Qualifications:** Attention will be paid to respondents with a demonstrated interest in the project, recognition of the need to work harmoniously and productively with UC Davis Health, HCAI, the progressive Design/Build Team, and proximity to the project site or willingness to establish a local office.

**Points** **20**

2. **Technical Approach:** Demonstrated expertise in designing and executing complex commissioning services. Describe the firm's planned approach to the project and an understanding of Design-Build and Lean Principles. Examples of required deliverables in this RFQ exemplify the firm's methodology and planning approach.

**Points** **20**

3. **Experience of the Firm:** The experience of interest to the selection committee will be of similar size, type and complexity to the Central Utility Plant Expansion project executed within the past ten years by the firm. Especially HCAI Level 1 & 3 projects, projects valued at over \$200 million in construction value, and projects with design-build or progressive design-built contracts located in Sacramento.

**Points** **20**

4. **Expertise of Personnel:** Please list all personnel proposed for the project and identify the proposed Project Manager and main point of contact for this project. Demonstrated expertise of the key personnel in relation to the scope of potential work, including relative degrees, licenses, and certifications.

**Points** **40**



**SELECTION PROCESS AND SCHEDULE:**

The selection of a firm will be accomplished by the following process. After Qualification Statements are received, a Screening Committee will review, score, conduct reference checks and recommend a shortlist for additional discussions. A Selection Committee will conduct those discussions and recommend the best qualified firm for selection.

The timeline for the qualification and contracting is below:

1 <sup>st</sup> Ad for services:	April 16, 2024
Statements due:	4 p.m. May 13, 2024
RFQ Shortlist Determined:	May 16, 2024 (tentative)
Final Screening Interviews:	Week of: May 27, 2024 (tentative)
Firm's notification(s):	Week of: May 31, 2024 (tentative)