

**REQUEST FOR
STATEMENTS OF QUALIFICATIONS
FOR**

**PROJECT MANAGEMENT MANUAL
& TRAINING PROGRAM**

FEBRUARY 28, 2023

**UC DAVIS HEALTH
FACILITIES PLANNING & DEVELOPMENT DIVISION
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ATTACHMENTS:

Consultant Statement of Qualifications Form
Professional Services Agreement - Sample

BACKGROUND:

UC Davis Health is an integrated, academic teaching and research healthcare organization maintaining the historic UC Davis tradition of being guided by public service in all its endeavors. UC Davis Health includes the School of Medicine, the Betty Irene Moore School of Nursing, a 645-bed (Trauma Level 1) acute care hospital, a National Cancer Institute-designated Cancer Center, the M.I.N.D. Institute, and outpatient clinics throughout the Sacramento region.

UC Davis Health's Facilities Planning and Development Division (FP&D) is comprised of several teams responsible for the delivery of the UC Davis Health's Capital Improvement Program with an active portfolio of approximately 1000 projects totaling approximately \$7.5 billion. FP&D is seeking qualified project and construction management firms to develop a comprehensive Project Management Manual and Training Program to standardize project management processes and practices within FP&D. This Request for Statements of Qualifications (RFSOQ) provides a description of the project and professional services that are being sought and the submittal requirements for interested firms.

PROJECT DESCRIPTION:

FP&D is seeking qualified project management and construction management firms to develop a comprehensive Project Management Manual and Training Program to standardize project management processes and practices within FP&D. In close consultation with FP&D leadership and staff, the selected firm shall develop a comprehensive Project Management Manual that will guide new project managers through the entire life cycle of a construction project. The selected firm shall also provide a comprehensive Training Program that is correlated to the project management manual including training modules, training materials, and a timeline for which an individual could complete the entire training program.

PROFESSIONAL SERVICES REQUESTED:

FP&D is seeking the following services from the selected firm:

Task 1: A review of all existing practices related to FP&D's management of construction projects. This review shall include the collection and evaluation of all current project decision making documents including but not limited to scoping documents, design and construction phase documentation, field directives and change orders, and closeout documents. The purpose of this effort is to understand what tools and processes FP&D in aggregate already has in place and working with FP&D leadership and staff determine what is working, what isn't, and what is missing.

Task 2: In consultation with FP&D staff leading this effort develop a Project Management Manual and Training Program Committee of FP&D staff who will provide ongoing input and direction.

Task 3: The development of a comprehensive Project Management Manual that will guide new project managers through the entire life cycle of a design and construction project – including expense projects, minor capital projects, and major capital projects. The Project Management Manual shall include vetted FP&D tools, processes and project decision making documents that already exist and incorporate new tools and processes where none currently exist or where current tools are in need replacement. The final Project Management Manual shall be delivered to FP&D as a virtual document with clear organization and chaptering and separate chapters that can be integrated into FP&D's digital commons (SharePoint). The virtual document should include digital links to active policies, resource documents, etc.

The Project Management Manual shall be organized in a simple and efficient manner that guides

a project manager through the entire process (should they desire) or to individual sections that address specific question. At a minimum the sections shall include the following:

- Introduction
- Project Initiation, Scoping, & Estimating
 - i. Owner Project Requirements (OPR)
- Project Reporting & Expectations
 - i. Client Engagement
 - ii. Cashflow forecasting
 - iii. Project scheduling
- Approvals & Capital Planning (Funding)
- Procurement Documents:
 - i. RFQ/RFP
 - ii. Agreements
 - iii. Pre-Bid & Pre-Qualification
 - iv. Proposal
 - v. Award
- Early Studies & Project Feasibility
- Environmental Planning & Compliance
- Real Estate Transactions & Leased Property
- Design
 - i. Design Guidelines & Standards
 - ii. Design Phase Reviews
 - iii. Design Phase Requests for Change
- Commissioning
- Sustainability
- Information Technology - IT
- Construction:
 - i. Construction Start
 - ii. Construction Phase Requests for Change & Change processing
 - iii. Construction Payments
- Equipment (medical equipment and furniture)
- Transition Planning & Building Activation
- Operations and Maintenance
- Completion & Closeout

The Project Management Manual will be expected to comply with all University of California and UC Davis Health policies, including but not limited to the UCOP Facilities Manual. The selected firm shall be expected to incorporate materials from peer institutions that UC Davis Health could adapt to expedite the effort including existing materials from UCOP.

The Project Management Manual shall also be graphically coherent, conforming to UC Davis Health's brand guidelines with all documents contained within updated so that they visually correlate.

Task 4: In conjunction with the Project Management Manual, a comprehensive Training Program shall be developed that correlates to the Project Management Manual including training modules, training materials, and a timeline for which an individual could complete the entire training program. Note that the training Program shall be developed to allow a Project Manager a

maximum of 8 hours per month to dedicate to trainings. The selected consultant shall be expected to lead the trainings for one full cycle of the entire training program with the intent that the program can be handed off afterwards to FP&D as “turn-key”. The Training Program shall be developed in a manner that allows training modules to be delivered both in person and virtually and should include knowledge checks from attendees to monitor the effectiveness of the training.

Task 5: The selected firm will be retained on an ongoing basis beyond tasks 1 through 4 to provide ongoing training support and updates as required.

Tasks 1 through 4 are anticipated to take between 6-10 months. However, the expected duration of the Agreement for these services will be three (3) years from the time of contract award to accommodate ongoing services that may be required for Task 5. Anticipated fees will be dependent on specific projects authorized, with a maximum limit of \$750,000 over the course of the contract with the successful firm.

SUBMITTAL REQUIREMENTS:

Please address all 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. Qualifications shall be no more than 30 pages (as indicated below) and all pages should be in 8 ½ x 11 format and tabbed as follows.

Tab 1 - Cover Letter and Organization Introduction (2 pages maximum): Submit a cover letter with general statements about the organization’s qualifications for the services described in this RFSOQ. 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 this project.
- c. Key personnel who will staff this project.
- d. Highlight relevant experience delivering comparable projects.
- e. Highlight any relevant experience with University of California system, UC Davis Health, and HCAI projects.

Cover Letter should be addressed to Leila Couceiro, Contracts Manager.

Tab 2 – Project Management & Training Expertise (6 pages maximum): Demonstrate your firm’s expertise as it relates to capital project management. Describe your firm’s approach to managing projects and how this approach can be adapted to meet UC Davis Health’s needs. Describe the tools and processes your firm uses to ensure consistent management between projects and relevant lessons learned. Demonstrated expertise in creating and providing a training program for project managers. Describe your firm’s approach to monitoring a training program to ensure success.

Tab 3 - Relevant Project Experience & References (6 pages maximum): Provide descriptions of three projects that have been executed within the past 15 years by the firm. The projects described shall be similar to the services being requested (i.e. development of a project management manual and or training programs/materials). These projects should also include client contacts who will be contacted as references. Please include at least the following information:

- f. Project name
- g. Project owner with current address, telephone number, and email address.

- h. Project duration
- i. Year of Completion
- j. Consultant's role on the project
- k. Project description

Tab 4: Staffing (12 pages maximum): List all personnel proposed for the project and identify the proposed Project Manager and main point of contact for this project. Provide a project organizational chart including both in-house and consulting roles and include the resumes for all proposed project personnel, to include, at a minimum, the following information:

- l. Full name, position in the firm, years with the firm and office location
- m. Education (list all degrees and institutions), CA licenses and affiliations
- n. Project role and responsibilities
- o. Relevant project experience

Tab 5: Project Approach (4 pages maximum): Describe your firm's understanding of the project. Describe your firm's approach to working with your client to understand the needs of a project and how this understanding is used to develop an appropriate project scope and team to expertly deliver the project. Describe your firm's approach for keeping projects on budget and on schedule.

Submittal should be specifically tailored to this RFSOQ and include a completed Consultant Statement of Qualifications Form (attached). Provide attachments as appropriate to respond directly to the screening criteria. Boiler plate or generic pages are not desired.

ONE (1) pdf copy of your firm's statement of qualifications must be received by the University **no later than 2:00 p.m. Monday, March 20, 2023** via upload link provided by Leila Couceiro, Contracts Manager - lcouceiro@ucdavis.edu.

SCREENING CRITERIA

1. **Project Management & Training Expertise:** Demonstrated experience with capital project and construction management including principles and best practices. Expertise in creating and providing a training program for project managers.

Points: 30

2. **Relevant Project Experience:** Previous experience that demonstrates success in completing comparable projects. Preference will be given for those teams who demonstrate that the relevant projects were delivered by the personnel proposed for assignment to this project.

Points: 30

3. **Staffing:** Clear and appropriate definition of roles including a project organizational chart and resumes. Proven staff experience and expertise to manage and deliver projects with a variety of scope and complexity.

Points: 30

4. **Project Approach:** Proven project management expertise with the ability to create and manage a project process. Proven ability to create and manage a project process within a defined budget and schedule. Project implementation approach tailored to the special needs of the project.

Points: 30

SELECTION PROCESS AND SCHEDULE:

After Qualification Statements are received, a Screening Committee will review, conduct reference checks, and recommend a short list of firms for brief interviews. The target dates are listed below:

1 st Ad for services:	February 28, 2023
Statements due:	2:00 p.m. Monday, March 20, 2023
Screening completed:	March 31, 2023 (tentative)
Interviews completed:	April 20, 2023 (tentative)
Recommendation approval:	April 20, 2023 (tentative)
Firm's notification(s):	April 21, 2023 (tentative)