



Facilities Planning and
Development Division

**REQUEST FOR
STATEMENTS OF QUALIFICATIONS
FOR
DESIGN STANDARDS, DESIGN MILESTONE REVIEWS,
AND LEAN SERVICES**

NOVEMBER 3, 2025

**UC DAVIS HEALTH
FACILITIES PLANNING & DEVELOPMENT
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ATTACHMENTS:

Consultant Statement of Qualifications Form
Blanket Agreement Sample
Long Range Development Plan (LRDP)
Key Design Framework

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 653-bed (Trauma Level 1) acute care hospital, a National Cancer Institute-designated Cancer Center, the M.I.N.D. Institute, Aggie Square Research and Public Partnership, Tschannen Eye Institute, a 52 bed Acute Rehabilitation Hospital and outpatient clinics throughout the Sacramento region.

The UC Davis Health Facilities Planning & Development division is comprised of several teams responsible for the implementation of the health system's Capital Improvement Program in keeping with the Long-Range Development Plan (LRDP), the Real Estate portfolio, the Infrastructure Maintenance portfolio, and the Capital Project portfolio. The Capital Projects Team is responsible for project management of capital improvement and expense construction projects of large and small scope and complexity with prominent significance within the campus, requiring Chancellor approval and involving the direction of multiple high-level design and engineering professionals.

Interviews will be conducted to select up to three consulting firms that will support the Facilities Planning & Development division for the scopes described below.

PROFESSIONAL SERVICES REQUESTED:

Requested services will support projects with budgets typically between \$1 million and \$70 million in singular or in aggregate, although some may be smaller or larger. Services to be provided may include, but are not limited to design guidelines/standards/templates development and updates, design reviews at project milestones, and Lean consulting.

One consulting firm will be selected for each of the three categories of work listed below; at its discretion, the University may select one firm to provide more than one Work Scope. Firms must indicate each Work Scope they wish to be considered for and demonstrate their experience and staffing skills specific to each indicated work category. See Form and Content of SOQs (Page 6) and Screening Criteria (Page 8) for specific qualifications required and maximum scoring points. The categories of work are as follows:

Work Scope 1: Lean Services **Maximum agreement \$2,000,000**

1. Project Overview

This scope defines the activities and deliverables for implementing Lean services within a healthcare environment. The goal is to apply Lean principles to improve operational workflows, reduce inefficiencies, and enhance value to patients and staff across targeted departments or service lines.

2. Objectives

- Identify and eliminate non-value-added activities in clinical and administrative processes.
- Improve patient flow, staff productivity, and resource utilization.
- Engage frontline staff in continuous improvement.
- Develop sustainable process improvements aligned with strategic goals.
- Build internal capacity for Lean thinking and problem-solving.

3. Deliverables

- Project Charter and Lean Engagement Plan
- Current State Process Maps
- Waste Identification and Root Cause Analysis
- Future State Design and Implementation Roadmap
- Rapid Improvement Event (RIE) Reports
- Key Performance Indicators (KPIs) and Metrics Dashboard
- Staff Training and Coaching Materials
- Final Summary Report with Recommendations

4. Tasks and Activities

- **Initiation & Planning:**
 - Define scope, goals, and target areas (e.g., ED throughput, discharge process, supply chain)
 - Identify stakeholders and form Lean teams.
- **Current State Assessment:**
 - Conduct Gemba walks and process observations.
 - Map workflows and identify bottlenecks.
- **Analysis & Design:**
 - Facilitate value stream mapping sessions.
 - Identify waste (e.g., delays, duplication, overprocessing)
 - Develop future state workflows.
- **Implementation:**
 - Conduct Rapid Improvement Events (Kaizen)
 - Pilot and refine new processes.
 - Monitor KPIs and adjust as needed.
- **Training & Sustainability:**
 - Provide Lean education and coaching.
 - Develop standard work and visual management tools.
 - Establish continuous improvement routines.

Work Scope 2: Design Guidelines, Standards and Templates Development & Updates

(Referenced below as guidelines or DGL)

Maximum agreement \$4,000,000

1. Project Overview

This scope outlines the activities and deliverables required to develop comprehensive design guidelines for healthcare facilities. The guidelines will serve as a reference for architects, engineers, project managers, and stakeholders to ensure that all projects meet organizational standards, regulatory requirements, and best practices in healthcare design at UC Davis Health.

2. Objectives

- Establish consistent design standards across all healthcare projects.
- Ensure compliance with applicable codes and regulations (e.g., HCAI, ADA, NFPA, FGI).
- Promote patient-centered, safe, and efficient environments.
- Support sustainability, maintainability, and operational performance.
- Provide clear documentation for use during planning, design, and construction phases.

3. Deliverables (updates, changes, and development)

- Design Guidelines Document (online, PDF and editable format)
- Departmental Planning Standards (e.g., exam rooms, nurse stations, imaging suites)
- Room Data Sheets (RDS) and Typical Room Layouts
- Finish and Material Standards
- Equipment Planning Guidelines

- Wayfinding and Signage Standards
- Infection Control and Safety Design Criteria
- Sustainability and Energy Efficiency Guidelines
- Standard details and specifications (all sections – incl infrastructure, landscape, etc)
- Summary of Changes (if updating existing guidelines)

4. Tasks and Activities (Design Guidelines)

- **Initiation & Planning:**
 - Define scope, goals, success criteria and stakeholder groups
 - Review existing guidelines and identify gaps
 - Develop clear decision-making process
 - Meet with users or FP&D staff as required.
- **Research & Benchmarking:**
 - Analyze industry best practices and regulatory updates
 - Benchmark against peer institutions and recent projects
- **Stakeholder Engagement:**
 - Conduct workshops with clinical, facilities, and design teams
 - Gather feedback on current design challenges and needs
- **Drafting & Review:**
 - Develop draft guidelines and standards
 - Facilitate iterative reviews and incorporate feedback
 - Develop a system for updates and rollout of changes
- **Finalization & Distribution:**
 - Finalize document and obtain approvals
 - Distribute guidelines and provide orientation/training sessions

Work Scope 3: Design and Project Reviews (Milestone)

Maximum agreement \$3,000,000

1. Project Overview

This scope outlines the activities and deliverables associated with the design development and milestone review process for a healthcare facility project. The goal is to ensure that the design aligns with clinical workflows, regulatory requirements, budget constraints, and stakeholder expectations at each phase of development.

2. Objectives

- Facilitate structured design reviews at key project milestones.
- Ensure compliance with UC Davis Health's Design Guidelines.
- Ensure compliance with healthcare codes and standards (e.g., HCAI, ADA, NFPA).
- Incorporate input from clinical, operational, and facilities stakeholders.
- Document decisions and required changes at each review stage.

3. Milestone Review Phases

Milestone	Description	Key Deliverables
Conceptual Design	Initial layout and functional program	Block diagrams, adjacency plans
Schematic Design (SD)	Preliminary design with spatial relationships	SD drawings, narrative, cost estimate
Design Development (DD)	Refined design with systems integration	DD drawings, updated cost estimate
Construction Documents (CD)	Finalized design for permitting and bidding	CD set, specifications, permit submittals
Pre-Construction Review	Final review before construction	Approved CD set, contractor

Milestone	Description	Key Deliverables
	begins	coordination
Post-Occupancy Review	Evaluation after project completion	Punch list, lessons learned, user feedback

4. Tasks and Activities

- **Stakeholder Engagement:**
 - Collect feedback from clinical, administrative, and facilities teams
- **Design Coordination:**
 - Collaborate with architects, engineers, and consultants
 - Ensure integration of medical equipment, IT, and MEP systems
- **Documentation:**
 - Record meeting minutes, decisions, and action items
 - Track design changes and approvals
 - Collect and organize milestone documentation
 - Schedule review meetings with stakeholders
- **Review Execution:**
 - Facilitate milestone review sessions
 - Document findings, decisions, and action items
- **Reporting:**
 - Prepare milestone review reports
 - Track issues, risks, and follow-up actions
- **Governance Coordination:**
 - Present findings to Campus Architect and submittal team
 - Support approval workflows and documentation.

FORM AND CONTENT OF STATEMENTS OF QUALIFICATIONS

Put your Lean hats on; submittals should clearly state respondent's qualifications and approach to providing the required services. In reviewing the statements, UC Davis Heath will consider the responses to be reflective of the potential quality of the work the Consultant is able to perform. The submittal must be concise (maximum (2) 11x17 pages per scope you are submitting on; this page count doesn't include cover letter and CSOQ attachment) and please include the following elements on each scope your firm is submitting a proposal.

Cover Letter

Provide a one-page cover letter on your firm's letterhead that includes your address, phone number and e- mail address of the contact person or persons. List the name and title of each person authorized to represent the proposer in negotiations. Unless the proposer is an individual, all statements of qualifications must be signed with a firm/company/partnership/entity name and by a responsible officer or employee indicating that officer or employee's authorization to commit the proposer to the terms of the proposal. Obligations assumed by such signature must be fulfilled.

Qualifications and Experience:

- 1) Provide a statement of qualifications for your organization, including an organization chart, a statement of the size of firm, a description of services provided by your organization, and a

statement of the extent of experience/history providing the services requested by this RFQ.

- 2) How many full-time employees (FTEs) are you capable of assigning if you are selected?
- 3) Provide resumes which list education, industry certifications and professional affiliations for all key personnel that may be assigned to the Project Development and Planning Team. Experience with management of projects of varying scale and complexity must be demonstrated. Include information on no more than 3 project examples where a similar role was performed by each personnel proposed. Include project scope, scale, schedule, consultant role in the project, and owner information.
- 4) Provide QR code to your firm's main web page, (only provide one QR code on the submittal).

Approach and methodology:

This section describes your philosophy and service model for meeting the services required by this RFQ. Relevant considerations include the quality and feasibility of your approach to meeting these needs, the manner in which you plan to provide adequate staffing (including planning for absences and back-up coverage, training, and staff monitoring, etc.), and equipment or other resources provided by you, including software used to manage scope, schedule, budget, planning metrics, data analysis, etc. Keep these considerations in mind as you respond to the following:

- 1) Describe your understanding of the project's goals, challenges, and context. How does your team's approach to projects of similar scope and complexity? Identify how you will meet the requirements of the scope of work and related requirements stated in the RFQ. List any items that you cannot provide.
- 2) Outline your planning methodology, including key phases, decision-making frameworks, and tools used to support analysis and recommendations.
- 3) Describe any planning tools, software, or technologies your team uses to support analysis, visualization, and decision-making.

Design Guidelines, Milestone Reviews, and/or Lean Experience:

For each scope you are submitting a proposal; Provide UC Davis Health with previous experience that demonstrates success in completing projects of similar scope, complexity and cost, on time and on budget, including significant projects completed within the last five (5) years, include information on no more than 3 project examples. Demonstrated track record of meeting schedule and budget requirements, including proven success managing multiple user groups, schedule compliance, methodologies or frameworks used to meet project goals, and tools or technology employed on the project. The list should include:

- 1) Title of project
- 2) Name of the entity
- 3) Brief description of the project, including value/metric/outcome as it may apply.
- 4) Clients' names and contact information (may call as a reference).

Team Qualifications and Expertise:

Provide previous experience in representing the in all planning phases of a project. Ability to lead consultants, user groups, planning teams and leadership teams.. Demonstrated track record collaborating with various Owner stakeholders, ensuring conformance with Owner's requirements/guidelines and monitoring the overall health of the project. Ability to work with Owner's software programs as required. Keep these considerations in mind as you respond to the following:

- 1) Describe your experience in representing a university or similar organizations through the planning and development phases of a project (from development, programing, planning, and design review as it applies to your scope). Provide examples of projects where your team have played a leading role.
- 2) Have you previously worked with university or institutional clients? If so, describe how you managed the relationship and ensured alignment with the client's mission, values, and requirements.
- 3) Describe your experience collaborating with diverse university stakeholders (e.g., administration, faculty, facilities management). How do you ensure that their needs and priorities are met during the project lifecycle?
- 4) What strategies do you use to monitor the overall health of a project, including budget, timeline, quality, and stakeholder satisfaction? How do you ensure the project is progressing according to plan?

Consultant Statement of Qualifications Form Attachment:

Complete all sections even if the information seems redundant to other portions of your response.

SCREENING CRITERIA & POINTS:

Qualification and Experience	30
Approach and Mythology	25
Project Experience	25
Team Qualifications	20
Total Available Points per Each Work Scope	100

SELECTION PROCESS AND SCHEDULE:

The selection of firms for each Work Scope category will be accomplished by the following process: After Qualification Statements are received, a Screening Committee will review, conduct reference checks, and recommend a short list of firms for interviews. The identified Manager, Director, or Leader for each category must be present at the interviews to be conducted by a Selection Committee. The target dates are listed below:

1 st Ad for services:	Monday, November 3, 2025
Statements due:	2:00 p.m., Friday, November 21, 2025
Screening completed:	December 5, 2025 (tentative)
Interviews completed:	January 9, 2026 (tentative)
Recommendation approval:	January 16, 2026 (tentative)
Firm's notification(s):	January 19, 2025 (tentative)

ONE (1) pdf copy of your firm's statement of qualifications must be received by the University **no later than 2 p.m. Friday, November 21, 2025** via upload link provided by Leila Couceiro, Contracts Manager, Facilities Planning & Development - lccouceiro@health.ucdavis.edu