



Facilities Planning and  
Development Division

**REQUEST FOR  
STATEMENTS OF QUALIFICATIONS  
FOR  
PLANNING 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 planning consulting firms that will support the UC Davis Health Facilities Planning & Development division.

## **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 the full range of planning services from early investigations through project funding. Services may include, but are not limited to programming development and review, program management, space planning, campus planning, and building program needs assessments.

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: Medical and Space Planning Maximum agreement \$5,000,000**

#### **1. Project Overview**

This scope outlines the services required to support medical and space planning for a healthcare facility or campus. The goal is to ensure that clinical workflows, patient care standards, and operational requirements are effectively translated into spatial layouts and design strategies.

#### **2. Objectives**

- Assess current and projected clinical service needs.
- Translate medical program requirements into functional space layouts.
- Ensure compliance with healthcare codes and regulations (e.g., HCIA/OSHPD, ADA, NFPA).

- Optimize space utilization, adjacencies, and patient/staff flow.
- Support the University's planning, design, and delivery teams with clinical input and operational planning.

### **3. Deliverables**

- Medical Planning Program (clinical services, volumes, staffing).
- Functional and Space Programming Documents.
- Room Data Sheets (RDS) and Equipment Lists.
- Adjacency Diagrams and Flow Maps.
- Departmental Layouts and Test Fits.
- Compliance and Regulatory Review Summary.
- Final Space Plan aligned with project scope and budget.
- Space auditing and utilization.

### **4. Tasks and Activities**

- **Needs Assessment:**
  - Engage clinical stakeholders to define service requirements.
  - Analyze patient volumes, staffing models, and care delivery trends.
- **Functional Programming:**
  - Define departmental functions, workflows, and space needs.
  - Develop space standards and planning metrics (e.g., SF per bed, exam room ratios), and/or adhere to standards already in place.
- **Space Planning:**
  - Create adjacency diagrams and flow maps (patient, staff, materials)
  - Develop room layouts and test fits for key departments.
- **Regulatory Review:**
  - Ensure compliance with HCAI/OSHPD, ADA, infection control, and other standards.
- **Design Coordination:**
  - Collaborate with architects and engineers during schematic and design development phases
  - Review drawings for alignment with medical planning requirements.

## **Work Scope 2: Master Planning (Campus, Building, Departmental)**

**Maximum agreement \$5,000,000**

### **1. Project Overview**

This scope outlines the planning activities required to develop comprehensive master plans for a healthcare organization. These master plans will guide future development, optimize space utilization, support clinical and operational goals, and ensure regulatory compliance across the healthcare campus. (Not intended for LRDP and Physical Design Framework Efforts)

### **2. Objectives**

- Assess current campus, building, or departmental conditions, including facilities, infrastructure, and services.
- Forecast future healthcare needs based on population growth, service demand, and strategic goals.
- Develop a phased plan for facility upgrades, expansions, and new construction.
- Align physical planning with clinical, academic, research, operational, and financial strategies.
- Ensure compliance with healthcare regulations and sustainability standards.

### **3. Deliverables**

- Project Charter and Planning Framework
- Existing Conditions Assessment Report

- Space Utilization and Functional Analysis
- Strategic Growth Forecast and Service Line Projections.
- Infrastructure and Site Analysis (utilities, access, zoning)
- Stakeholder Engagement Summary
- Conceptual Site Plans and Phasing Diagrams
- Financial and Implementation Strategy

#### **4. Tasks and Activities**

- **Initiation & Planning:**
  - Define scope, goals, and planning principles.
  - Identify stakeholders and form planning committee.
- **Data Collection & Analysis:**
  - Space utilization studies
  - Demographic and market analysis
  - Regulatory and zoning review
- **Strategic Alignment:**
  - Integrate organizational strategic plan and clinical priorities.
  - Forecast service line growth and operational needs.
- **Concept Development:**
  - Develop multiple planning scenarios.
  - Evaluate site capacity, circulation, and adjacencies.
- **Stakeholder Engagement:**
  - Conduct workshops and interviews.
  - Gather input from clinical, administrative, academic, research and community stakeholders.
- **Finalization & Reporting:**
  - Refine preferred master plan scenario.
  - Develop phasing strategy and cost estimates.
  - Present final plan to leadership and governing bodies.

### **Work Scope 3: Delivery System Planning Needs Assessments (Current and Future State) Maximum agreement \$2,000,000**

#### **1. Project Overview**

This scope defines the activities and deliverables required to conduct a comprehensive delivery system planning and facility needs assessment for a healthcare initiative. The goal is to evaluate current conditions, identify future needs, and inform facility decision making that is aligned with demand, access, cost and quality related to factors such as organizational goals, patient care priorities, and regulatory requirements.

#### **2. Objectives**

- Assess current service area and service line facilities, infrastructure, and operational performance.
- Identify facility gaps in care, capacity, technology, and staffing.
- Evaluate facility utilization with consideration of market demand, population health trends, and competitive landscape.
- Align findings with strategic goals and regulatory mandates.
- Provide actionable recommendations for future planning and investment.

#### **3. Deliverables**

- Project Charter and Assessment Framework
- Stakeholder Engagement Plan
- Current State Analysis Report

- Gap Analysis and Needs Summary
- Strategic Alignment Matrix
- Market and Demographic Analysis
- Regulatory and Policy Impact Summary
- Final Needs Assessment Report with Recommendations

#### **4. Tasks and Activities**

- **Initiation & Planning:**
  - Define scope, goals, and stakeholders
  - Develop assessment methodology and timeline
- **Data Collection:**
  - Review internal data (clinical volumes, financials, staffing)
  - Conduct interviews and focus groups with key stakeholders
  - Analyze external data (CHNA, market trends, population health)
- **Analysis:**
  - Perform SWOT and gap analysis
  - Evaluate alignment with strategic plans and regulatory requirements
- **Synthesis & Reporting:**
  - Develop findings and recommendations
  - Present draft report to leadership
  - Finalize report based on feedback

### **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 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 teams 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.

### **Project Planning and Development Experience:**

For each scope you are submitting a proposal; Provide UC Davis Heath with previous experience that demonstrates success in completing planning and development 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 uses 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 pre-design as it applies to your scope). Provide examples of projects where you/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
<b>Total Available Points per Each Work Scope</b>	<b>100</b>

**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, score, 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 <sup>st</sup> 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 - [lcouceiro@health.ucdavis.edu](mailto:lcouceiro@health.ucdavis.edu)