



Facilities Planning and
Development Division

**REQUEST FOR
STATEMENTS OF QUALIFICATIONS
FOR
PROJECT DEVELOPMENT SERVICES**

NOVEMBER 3, 2025

**UC DAVIS HEALTH
FACILITIES PLANNING & DEVELOPMENT
4800 2ND AVENUE, SUITE 3010
SACRAMENTO, CA 95817
HEALTH.UCDAVIS.EDU/FACILITIES/**

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ATTACHMENTS:

Consultant Statement of Qualifications Form
PSA 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 two consulting firms that will support the Project Development team of the 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 project development services from early investigations through initial project funding. Services may include, but are not limited to programming development and review, estimating, scheduling, constructability review, project scoping, cost modeling, and business case development.

One consulting firm will be selected for each of the two 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 7) for specific qualifications required and maximum scoring points. The categories of work are as follows:

Work Scope 1: Project Development **Maximum agreement amount: \$4,000,000**

1. Project Overview

This scope outlines the process for evaluating, prioritizing, and initiating healthcare projects through a standardized intake and development framework. The goal is to ensure alignment with strategic goals, regulatory requirements, and resource availability while promoting transparency and accountability in project selection.

2. Objectives

- Establish a consistent intake process for project proposals.
- Evaluate project feasibility, strategic alignment, and resource needs.

- Facilitate stakeholder engagement and early planning.
- Develop preliminary scopes, budgets, and timelines for approved projects.
- Create a pipeline of vetted projects for leadership review and prioritization.
- Define the healthcare service or facility opportunity.
- Develop financial feasibility and sustainability models.
- Outline staffing, operational workflows, and technology needs.
- Identify risks, including clinical, financial, and compliance related.

3. Deliverables

- Project Intake Form and Submission Guidelines
- Intake Review Criteria and Scoring Matrix
- Project Charter Template
- Preliminary Scope, Budget, and Schedule for Selected Projects
- Stakeholder Engagement Summary
- Project Pipeline Dashboard
- Governance Review Package (PRC or CRC)
- Risk Assessment
- Final Business Plan Document

4. Tasks and Activities

- **Intake Process Design:**
 - Develop intake forms and submission protocols.
 - Define review criteria (e.g., strategic alignment, ROI, regulatory need)
- **Project Evaluation:**
 - Review submissions with the cross-functional team.
 - Score and prioritize based on defined metrics.
- **Stakeholder Engagement:**
 - Conduct initial meetings with project sponsors.
 - Identify clinical, operational, and facilities impacts.
- **Preliminary Development:**
 - Validate project feasibility, confirm needs.
 - Create scope plans and prepare scope documentation.
 - Provide guidelines for the project delivery approach and constructability.
 - Prepare a detailed budget based on construction, IT, PO&M & BAIE estimates.
 - Prepare preliminary master schedules.
 - Assess risks and dependencies.
- **Governance & Reporting:**
 - Present vetted projects to leadership.
 - Maintain dashboard of active and pending projects.

Work Scope 2: Cost Estimating and Project Scheduling

Maximum agreement amount: \$3,000,000

1. Project Overview

This scope defines the activities and deliverables for providing cost estimating services to support healthcare facility planning, development, and pre-design. The goal is to deliver accurate, timely, and comprehensive cost estimates that inform project feasibility, budgeting, and funding strategies.

2. Objectives

- Develop cost estimates at key project milestones (e.g., concept, planning and per design).
- Provide detailed breakdowns of construction, equipment, and soft costs.
- Support value engineering and cost control efforts.

- Align estimates with healthcare-specific regulatory and operational requirements.
- Assist in budget validation and funding approvals.

3. Deliverables

- Cost Estimate Reports (by milestone)
- Detailed Line-Item Breakdowns (CSI divisions or Unifomat)
- Cost Comparison and Variance Analysis
- Escalation and Contingency Recommendations
- Value Engineering Options
- Estimate Assumptions and Basis of Estimate Documentation
- Final Cost Summary for Preliminary Budget Approval

4. Tasks and Activities

- **Initial Planning:**
 - Review project scope, drawings, and specifications.
 - Confirm estimating methodology and format.
- **Estimate Development:**
 - Prepare milestone estimates (Conceptual, planning and per design)
 - Include construction, management costs, FF&E; including IT, permits, and contingency.
 - Apply healthcare-specific cost factors (e.g., OSHPD/HCAI compliance, infection control)
- **Review and Validation:**
 - Conduct estimate review meetings with University and stakeholders.
 - Compare estimates to benchmarks and historical data.
- **Value Engineering Support:**
 - Identify cost-saving alternatives.
 - Provide impact analysis for scope changes.
- **Reporting:**
 - Submit formal estimate reports with executive summaries.
 - Update estimates based on design revisions or scope changes.

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 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 Development/Cost Estimating & Scheduling Experience:

For each scope you are submitting a response, provide UC Davis Heath with previous experience that demonstrates success in completing project development for capital programs of similar scope, complexity and cost, on time and on budget, including significant projects completed within the last five (5) years. Please include information on no more than 3 project examples. Demonstrated track record of accurate cost estimating, 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 project development and cost estimating services. 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 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 |
| 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, 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:

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|----------------------------------|--------------------------------------|
| 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