

REQUEST FOR QUALIFICATIONS

AS-NEEDED

CONSULTING PROJECT MANAGER

For the

**UNIVERSITY OF CALIFORNIA, SAN DIEGO
OFFICE OF CAPITAL PROGRAM MANAGEMENT**

**Proposals due:
JULY 11, 2019**

**Issue Date:
June 25, 2019**

I. OVERVIEW

The University of California, San Diego (UC San Diego) and the office of Capital Program Management (CPM) request written responses to this Request for Qualifications (RFQ) for the selection of As-Needed Consulting Project Manager(s).

Under the direction of the CPM Senior Directors, the Consulting Project Manager will assist, on an as-needed basis, with project management and quality control services for the design and construction of selected capital improvement projects and associated work. Work may also be supervised by CPM Program Managers. Projects associated with UC San Diego Campus, including Health Systems, may be located throughout the general campus and be under the jurisdiction of the Campus Building Official and Campus/Health System Fire Marshals. Projects associated with the UC San Diego Health System may be located in an acute care hospital environment under the jurisdiction of the Office of Statewide Health Planning and Development (OSHPD).

II. PROJECT INFORMATION

A. BACKGROUND

UC San Diego is located adjacent to the communities of La Jolla and University City within the northern portion of the City of San Diego. The UC San Diego main campus encompasses 1,158 acres in size and is generally composed of three distinct, but contiguous, geographical areas: the Scripps Institution of Oceanography (SIO) portion of the campus, the western area of the campus (“West Campus”), and the eastern area of the campus (“East Campus”). The East and West Campuses are bisected by Interstate 5 (I-5). The UC San Diego Hillcrest campus, located roughly 13 miles south of the main La Jolla campus, occupies just over 60 acres along the northern edge of the City of San Diego’s Uptown Community, south of Interstate-8.

B. OVERVIEW OF POTENTIAL PROJECTS

UC San Diego’s current and proposed capital improvement projects include: construction and/or expansion of academic and research buildings, medical research and clinical facilities, housing facilities, hospital facilities, parking/transportation facilities, and/or utility projects.

III. SCOPE OF SERVICES

The University wishes to engage the selected As-Needed Consulting Project Manager for the following services including, but not limited to, the following activities:

- Leadership, management and coordination of various parties involved in project planning, design and construction processes. These parties would include, among others, campus administrators, user groups and departments, campus staff and planners, facility systems

and maintenance engineers, architects and engineers, general contractors and sub-contractors and CPM.

- Directly responsible for the development and management of project budgets. Prepare detailed project budgets within established guidelines. Prepare documents for budget and funding approvals. Monitor and control expenditures, and forecast cost within the approved budget throughout the course of each project.
- Leadership, management and coordination of project planning, design and construction phases including project feasibility studies, existing conditions evaluation, cost and schedule analysis, contracts development, schematic design, design development, construction documents, contract documents, bidding, bid award, construction administration, construction close-out and post-construction follow-up. These services include the skill-sets that will encourage collaboration, consensus-building and problem-solving among the project stakeholders.
- Accountable for delivering multiple complex capital construction projects on schedule and within project budget on campus and/or at the medical centers. Manage projects from the programming phase through design, construction, occupancy, and warranty. Coordinate all project activities with the operations of multiple stakeholders. Act as official University Representative in relationships with contractors, architects, engineering, reviewing agencies, the campus community, and the public.
- Directly responsible for the development and management of project schedules. Prepare detailed project schedules for approval. Throughout each project, monitor and control all project tasks to meet approval deadlines and to complete the project on schedule.
- Directly responsible for the organization and leadership of each project team, including University staff and independent consultants and contractors. Prepare consultant contracts and authorizations. Establish priorities, insure adherence to policies and procedures, evaluate work for conformance to contractual agreements and approve payments.
- Review, evaluation, approval and reporting, on behalf of the University, on the general contractor's Cost proposals, Potential Change orders and Change Order Requests.
- Management, forecasting and reporting of project status including but not limited to budget, scope changes, schedule, project approvals, project risk and proposed mitigations.
- Preparation of monthly project dashboards, regular cadence meetings with stakeholders, project management with eBuilder.
- Evaluation, assessment, communication and reporting of in-progress construction work in terms of compliance with the Project Schedule, Project Budget and Project Program.

- Negotiation and settlement of construction conflicts including interpretation of the Contract Documents, assessment of Compensable Delay Claims, and evaluation of Change Order Proposals.
- Directly responsible for coordination of and approvals by the Associate Vice Chancellor and Assistant Vice Chancellor, Campus Architect, building committees, campus planners, campus departments, reviewing agencies and funding authorities. Directly responsible for coordination with and approvals by the authorities; building committees, facilities engineers and planners, departmental administrators and user groups, funding authorities as well as regulatory agencies.
- Directly responsible for facilitating and coordinating all regulatory review and approvals, and other external policy/code requirements in alignment with the University requirements as the Authority Having Jurisdiction.
- Review of construction plans and specifications for adequacy and completeness prior to bidding.
- Review of project specifications.
- Participation in constructability reports.
- Review/approval of general contractor submittals and shop drawings.
- Life-safety inspections for substantial completion readiness.
- Evaluation, assessment, recommendations and reporting regarding the general contractor's baseline construction schedules, look-ahead schedules and schedule updates required by the Contract Documents.
- Coordination and facilitation of project Close-out procedures and deliverables as required by the Contract Documents.
- Collection, coordination and submittal of final Record Drawings as required by the Contract Documents.
- Collection and organization of construction cost data at the conclusion of construction

IV. SELECTION CRITERIA

Respondents must be licensed business entities that are able to designate a qualified individual within the business entity for these services. Minimum demonstrated leadership and management experience shall include the following:

- Demonstrated leadership experience in developing an integrated team that excels through collaboration (architect, owner, contractor and other stakeholders).
- Demonstrated leadership ability to bring varied people and personalities together to develop solutions to both construction and design-related issues focused on total team success.
- Demonstrated leadership experience working within a highly regulated environment with multiple agencies in a design or construction management capacity.
- Demonstrated leadership experience in developing, managing and tracking complex financial needs of project (Cost Proposals, Change Orders, Potential Change Orders, Budget Contingency).
- Demonstrated leadership experience working on multi-phased renovation projects within active educational, institutional, and research facilities in a design or construction management capacity, with an emphasis on customer service.
- Demonstrated leadership experience working within a University or comparable environment in a design or construction management capacity.
- Demonstrated leadership experience creating and managing project budgets, and administering contracts of architects, engineers, and other design professionals.
- Demonstrated leadership experience in construction management, cost forecasting, construction administration, risk management or other related construction activities.
- A minimum of ten years working as a Project Manager in a design or project management capacity.
- Demonstrated experience in working on LEED certified projects.
- Demonstrated leadership experience in the development and application of critical path construction scheduling.
- Demonstrated understanding of the development, coordination and plan-review of design and construction drawings.

- Demonstrated understanding of the construction of building components such as structural, mechanical, electrical, plumbing, life-safety and telecommunication systems.
- Demonstrated understanding of planning, design, construction administration, construction close-out and building commissioning phases of project development.
- Demonstrated leadership experience working and collaborating with Inspectors of Record (IORs) during the course of construction.
- Demonstrated leadership experience, working knowledge of building codes, and collaborating with agencies as necessary to secure building permits, final inspections, project acceptance and Certificates of Occupancy.
- Demonstrated familiarity and resourcefulness with current software applications and technologies including, Excel, Word, Microsoft Project, internet-based project management tools such as e-Builder.
- At a minimum, the ability to provide Professional Liability Insurance in the amount of \$1,000,000 Each Occurrence and \$2,000,000 per Project Aggregate.

V. SELECTION AND CONTRACT REQUIREMENTS

A. SELECTION

The University intends to select one or more responding firms and possibly multiple project management consultants based on Section IV. It is anticipated that the projects will be assigned on a Qualifications basis and there is no minimum guarantee as to number of projects assigned. The University expects to tentatively conduct interviews of shortlisted firms the last week of July/first week of August 2019.

The criteria for review of the submitted qualifications and selection of the successful respondents are provided in Section I, Overview above.

B. CONTRACT REQUIREMENTS

All consulting services to be provided by the selected Consulting Project Manager(s) shall be in accordance with the standard University Contracting procedures, which have been approved by the Office of General Counsel.

The selected Consulting Project Manager(s) will perform work under a Professional Services Agreement (PSA) with the University, with authorizations for the specific assignment(s) thereafter. Services based on this RFQ may be initiated at the University's option through July 2024.

VI. STATEMENT OF UNDERSTANDING

All Shortlisted firms will be required to sign a Statement of Understanding. By signing the document it is acknowledged that a draft copy of the standard Professional Services Agreement and Non-Disclosure Agreement (NDA) has been read, and with reservation of rights, the terms and conditions are generally agreed upon. Additionally, notwithstanding, it is understood that this is a qualification based selection process.

VII. PROCEDURES FOR SUBMISSION

To be fully considered, the respondent firms shall comply with the following instructions:

A. FORMAT

One electronic copy on CD or flash drive, in pdf format, should be submitted, with any graphic images, spreadsheets or pages larger than 8.5” x 11” submitted in landscape view. No paper copies or emailed submittals will be accepted. *Firms should indicate throughout their proposal what information is considered confidential and proprietary. All information submitted in response to the RFQ will be considered official information acquired in confidence, and the University will maintain its confidentiality to the extent permitted by law.*

Proposals are due no later than 4:00 p.m., THURSDAY, JULY 11, 2019.

US Postal Service Mailing Address:

University of California, San Diego
Jessica Cuevas, Senior Contracts Administrator
Office of Capital Program Management
9500 Gilman Drive MC 0916
La Jolla, CA 92093-0916

Delivery or Overnight Mail Physical Address (e.g. FedEx):

University of California, San Diego
Jessica Cuevas, Senior Contracts Administrator
Office of Capital Program Management
10280 North Torrey Pines Road, Suite 465
La Jolla, CA 92037

Hours of business: Monday through Friday, 8:00 a.m. to 4:30 p.m.

B. REQUIRED RESPONSE ITEMS

The RFQ submittal shall contain the following response items:

- **LETTER OF INTEREST**
Provide a letter that expresses the respondent's interest to serve as an as-needed Consulting Project Manager, and also describes the respondent's leadership and design strengths in light of the qualifications criteria.
- **RESPONDENT'S QUALIFICATIONS**
The respondent is to complete and submit University of California Consultant Experience Form (Attachment A), and a University Statement of Qualifications (SOQ) form (Attachment B).
- **RESPONSE TO SELECTION CRITERIA**
Describe how and to what extent, the respondent firm satisfies, or intends to satisfy, the general requirements selection criteria in Section IV above.
- **RESUMES**
Submit resume for personnel that may be proposed and include relevant experience with similar projects, and indicate the role or duties performed on each project.
- **REFERENCES**
Provide relevant references for the proposed qualified individual(s) owners, architects, consultants, and contractors. Also provide references for the company. References can be listed on the Statement of Qualifications Form, Attachment B to this RFQ.
- **STANDARD BILLING RATE SHEET**
Provide an itemized rate schedule that identifies hourly rates. Rates are good for at least one year and inflation/Cost of Living adjustments may be considered at renewal date each year and requires University approval. For reference, reimbursable expenses are outlined in the attached exhibit.

Technical questions or questions regarding the scope of services should be directed to Rhonda Mitchell, Contracts Manager at rcmitchell@ucsd.edu. UC San Diego requests that interested firms refrain from contacting any other party regarding this project.

UC San Diego encourages the participation of Small, Disadvantaged, Minority-owned, Women-owned and Service/Disabled Veteran-owned Business Enterprises (S/D/M/W/DVBE's) and is committed to promote a diverse pool of firms for our building programs.

Every effort will be made to ensure that all persons have equal access to contracts and other business opportunities with the University within the limits imposed by law or University policy. Each candidate firm may be required to show evidence of its equal employment opportunity policy.

REIMBURSABLE SCHEDULE

FOR CAPITAL PROGRAM MANAGEMENT (CPM) AND DESIGN & DEVELOPMENT SERVICES (DDS) CONSULTANTS

TRAVEL EXPENSES:

All travel expenses which will be submitted to the University for reimbursement must be approved by University's Designated Administrator/Project Manager.

Travelers on University business will adhere to the "Travel Reimbursable Guidelines for CPM/DDS Consultants". Transportation, lodging, and living expenses do not apply for consultants whose offices are in the San Diego area and whose travel originates from there.

UC San Diego encourages travelers to the University to utilize University discounted rates for air fares, lodging and rental cars. Discounts can be accessed through Connexus/Balboa Travel [(888) 617-5005. <https://blink.ucsd.edu/travel/booking/connexus/fees.html>]

Unless otherwise approved by the UC San Diego CPM/DDS Project Manager, the following identifies the limits and exclusions to reimbursable expenses:

AIR FARE:

Full reimbursement for coach airfare will be reimbursed for travel between Design Professional's office and the University. Traveler is expected to make advance flight reservations so as to obtain the best available rates. Passenger's ticket receipt is required to be submitted in the request for reimbursement. First Class or Business Class travel will not be reimbursed without advanced, express written authorization from the University's Representative.

LODGING:

Each traveler will be reimbursed one (1) single room rate (up to \$275 per night plus applicable taxes). Traveler is expected to make advance lodging reservations so as to obtain the best available rates, and to take advantage of traveler's or University's discount programs when booking. Hotel self-parking for rental car will be reimbursed.

Requests for reimbursement must include itemized hotel invoice.

TRANSPORTATION:

Shuttle, taxi, Uber and Lyft charges to and from airport, hotel and University meeting sites are reimbursable in their entirety. Mid-Size rental car costs are reimbursed to traveler for the duration of their University visit, as are parking permit charges at the University.

Transportation by Consultants using their private vehicle for travel to and from University is reimbursable at the rate of \$.545 per mile (as of 01/01/2018), adjusted annually.

Requests for reimbursement must include itemized receipts.

Note: Transportation, lodging, per diem and related expenses for travel between the Consultant's offices and travel between offices of Consultant and offices of its subconsultants are not reimbursable.

MEALS AND INCIDENTALS:

For travel of 24 hours or more, the University will reimburse each traveler a maximum of \$62 per day for meals (regardless where purchased) and service tips and gratuities (for meals, bell services, etc.). Requests for reimbursement must include itemized receipts.

**Note: If claiming meals and incidentals for travel under 24 hours, the University may reimburse if an overnight stay was required, or if a working meal was an integral part of the meeting and not otherwise provided by the University. Submit itemized receipts and supplemental information indicating this situation.*

ITEMS EXCLUDED FROM REIMBURSEMENT:

Entertainment, in-room movies, gifts, gym, spa or laundry services, parking or other citations, First Class travel, companion travel, travel insurance, alcoholic beverages.

Consultants must submit itemized receipts and a summary of travel charges [see below*] for all reimbursement requests, as part of their regular invoicing.

NON-TRAVEL RELATED EXPENSES:

SUPPLIES/PRINTING ETC.

Expenses for printing, reproductions, and postage or delivery for documents, reports, surveys, drawings, and other materials from Consultant's office and the University may be reimbursed. Reproductions and postage and delivery fees between Consultant and their subconsultant are not reimbursable. Requests for reimbursement shall include itemized receipts.

*Summary of Travel Charges

UC San Diego Project No.: _____

Dates(s)	Personnel	Parking	Meals	Travel	Hotel	Gratuities