



Facilities Planning and  
Development Division

**REQUEST FOR  
STATEMENTS OF QUALIFICATIONS  
  
FOR  
  
TRANSITION & ACTIVATION PLANNING  
SERVICES – AGGIE SQUARE**

**December 1, 2023**

**UC DAVIS HEALTH  
FACILITIES PLANNING AND DEVELOPMENT DIVISION  
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[HTTPS://HEALTH.UCDAVIS.EDU/FACILITIES/](https://health.ucdavis.edu/facilities/)**

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ATTACHMENTS: Consultant Statement of Qualifications Form; Sample Professional Services Agreement (PSA).

## BACKGROUND:

Aggie Square is an innovation hub that will be home to research programs, private industry partners, classrooms, student housing, and public-facing programs that engage local communities and entrepreneurs. Aggie square will be located on the UC Davis' Sacramento campus along Stockton Blvd., south of 2<sup>nd</sup> Avenue. Phase 1 will cover just over 8 acres between 2<sup>nd</sup> Ave. and 3<sup>rd</sup> Ave.

UC Davis and Wexford Science and Technology are entering a Public Private Partnership (P3) to bring together a project neither entity could complete alone. Wexford will lease University-owned land to finance, build, and manage the Aggie Square buildings. The University and other industry partners will lease space in the buildings.

Construction on Phase 1 began in early 2022 and will be completed in early 2025.



- Phase 1 includes:
  - Lifelong Learning Tower (LLL – Orange 2)
  - Life Science, Technology & Engineering Buildings (LSTE – Blue 4)
  - Housing & Market Plaza – Mixed Use Residential (MUR – Green 3)
  - Parking Structure (PS6)
  - Central square that will feature outdoor and mobile workspace for spirited brainstorming. (Aggie Square – Yellow 1)
- The LLL is a 255,000sf 8 story education and learning building.
  - The 1<sup>st</sup> 2 floors will have classrooms, community engagement space, innovation lab, auditorium, café, and direct indoor connections to the LSTE East building.
  - The upper floors will be office space that will house UC Davis departments and private businesses.
  - UC Davis will occupy approximately 170,000sf in the LLL
- The LSTE East building is a 280,000sf 7 story lab, research and engineering facility.
  - UC Davis will occupy approximately 180,000sf in the LSTE-E
  - Space includes wet labs, surgical skills training and specialized research spaces with significant equipment and environmental controls.
  - Building has a catwalk floor with the mechanical for the TI uses in the floor below.
- The LSTE West building will be additional lab, research and engineering space (Construction dependent on industry commitment). The Developer has not yet initiated LSTE West.
- Parking Structure (PS6)
  - Six-floor, 1552-space parking structure
  - Located South of FSSB
  - Access from 2nd and 3<sup>rd</sup> Ave

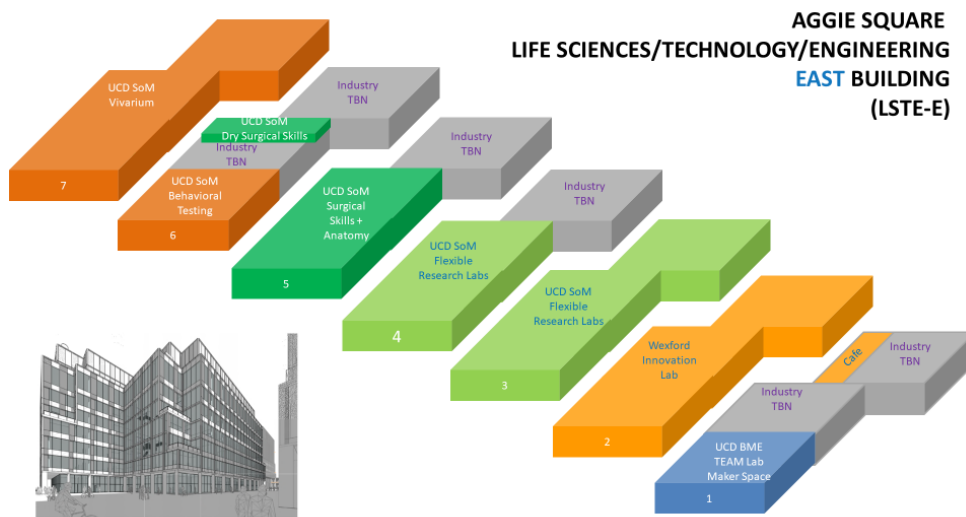
- The Housing and Market Plaza (MUR) is a 6-story, 260,000 SF mixed-use building.
  - The 1<sup>st</sup> floor will have a 15,000sf catering kitchen and retail space.
  - The upper floors contain a variety of housing units with a total of 252 bedrooms.

UC Davis Health is seeking a firm with relevant experience to provide Transition and Activation Planning services in support of the LLL and the LSTE moves and transitions. Off-campus transitions related to this initiative may include but are not limited to moves and transitions from the UC Davis Campus (in Davis, CA). The selected firm will be expected to sign a Professional Services Agreement with a duration of 15 months and a dollar threshold not to exceed \$900,000.00.

**PROJECT DESCRIPTION:**

The selected firm would provide on-call resources to serve as liaison on approximately 10-12 relocations comprised of educational, clinical training spaces, vivarium space, and administrative (primarily office and workstations) departments over approximately the next fifteen (15) months. Individuals from the selected firm will work alongside full-time University staff. The selected firm will oversee the entire transition planning and activation process from start to finish and ensure that all aspects of the moves are coordinated and executed according to plan. This may require working with contractors, vendors, and other stakeholders to ensure that all timelines are met and that any issues that arise are quickly addressed.

The two buildings addressed in this project are the LLL (Orange 2, image above) and LSTE (Blue 4, above). They are shown below in diagrammatic form.



**Floor 1**

- Biomedical Engineering Maker space, UCD College of Engineering
- Loading dock, back of house space shared with the whole building
- Industry partners and Café – not UCD spaces

**Floor 2**

- No University space. This is Wexford’s flexible labs area.

**Floor 3**

- All School of Medicine flexible labs

**Floor 4**

- 2/3 School of Medicine flexible labs
- 1/3 Industry tenants

**Floor 5**

- 2/3 School of Medicine Gross Anatomy, Surgical Skills training

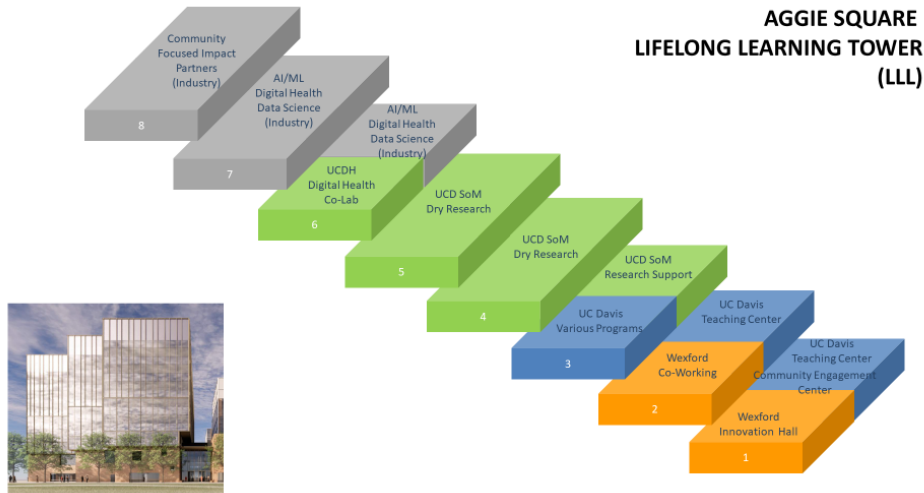
- 1/3 Industry tenants

**Floor 6**

- 1/2 School of Medicine, Behavioral Skills Testing
- 1/4 School of Medicine Dry Surgical Skills training
- 1/4 Industry tenants

**Floor 7**

- Vivarium



**Floor 1**

- 1/2 Classrooms and Community Engagement, UCD Campus
- 1/2 Wexford

**Floor 2**

- 1/2 Classrooms UCD Campus
- 1/2 Wexford

**Floor 3**

- 1/2 Office Space, UCD Campus
- 1/2 Office Space, School of Medicine

**Floor 4**

- All School of Medicine, office space

**Floor 5**

- All School of Medicine, office space

**Floor 6**

- 1/2 Office Space, School of Medicine
- 1/2 Industry Space

**Floor 7**

- All industry, no University use

**Floor 8**

- All industry, no University use

## **PROFESSIONAL SERVICES & SCOPE OF SERVICES REQUESTED INCLUDE:**

Qualified firms shall collaboratively work with University project managers and leadership to facilitate building transition and activation planning discussions with end users, maintaining building activation timelines, activities and budgets.

Qualified firms shall have the ability to perform site visits to UC Davis Health sites regularly and have personnel within geographical proximity, or a reasonable travel distance, to the Sacramento area. Selected firm shall have the ability to be located physically on the UCD Facility site, full time or as needed.

The effort may include the following transition planning and activation services; size, complexity and approximate quantity shown below as appropriate:

### **1) Assessment/Planning:**

- a. Interview with stakeholders
- b. Assessment outcome: Develop and track recommendations, potential risks, and next steps.
- c. Exercises: Facilitate sessions to identify changes in workflow and evaluate during planning phase.

### **2) Transition Planning:**

- a. Project Timeline: Create Project Timeline with milestones and workstreams. Timeline to include, though not limited to, WBS, identified resources, timeframes, and a 90-day look ahead.
- b. Departmental Project Plans: Develop task lists for each department's transition effort with start/end date & responsible owner, based on project timeline.
- c. Roadmap: Create month by month planning tool with Transition and Activation Planning activities by workstream. To be used with project timeline to detail monthly project activities.
- d. Meeting Management:
  - i. Lead transition meetings to communicate project updates to stakeholders.
  - ii. Track status of assigned tasks.
  - iii. Prepare meeting materials, agendas, minutes, presentations, and task lists with meeting notes.

### **3) Activation Planning:**

- a. Direct planning for pre-opening activation activities with end users, including resourcing, scheduling, and end user coordination. Such activation activities can include the following:
  - i. Workflow "Sprint" facilitation events for large or complex projects
  - ii. Script development and Dress Rehearsals
  - iii. Day in the Life (DITL) events
  - iv. Mock survey events
  - v. Facilitate all meetings with users and support services.
- b. Direct pre-planning, budgeting, and provides oversight of operational analyses and planning to fulfill activations work and ensure successful transition plans. Such analyses could include though not limited to:
  - i. Mapping paths of travel for urgent workflows (example: path for animal transport or the body donation program)
  - ii. Coordination of support services by department
    1. Provide information to support services for building operational readiness.
- c. Create and manage staff training plan:
  - i. Direct appropriate resources to ensure activation readiness through staff training, in collaboration with end users and business partners. Includes: identifying staff training needs, coordinating training resources, managing timeline before and after move.
- d. Orchestrate opening activation activities with end users and stakeholders, such as:
  - i. Final dress rehearsals
  - ii. Work/School Day 1
  - iii. Command center management, including resourcing, huddle leadership, and report-outs from Dress Rehearsal and DITL events.

- iv. Maintenance of issue log and tracking/follow-up of activations action items.
  - v. Identification of end user “Super Users” or Champions.
- e. Direct and oversee updated building/classroom/lab information as needed, which could include:
  - i. Updating address/location on all platforms (digital/analog)
  - ii. Phone numbers, voice mail boxes, and after-hours operating services (especially labs)
  - iii. Ensuring all contact information goes live and is delivered to all needed recipients.
- f. Go/No-Go Assessment:
  - i. Complete assessment before each major milestone to evaluate operational readiness.
  - ii. Identify and mitigate potential risks.
  - iii. Create contingency planning and response strategy.
- g. Issues Management:
  - i. Create centralized method for issues management process to report and track identified issues.
  - ii. Document and track key decisions to provide historical record for stakeholders to reference throughout the project.
  - iii. Track critical decisions, source, and decision date.
  - iv. Identify and escalate issues if schedule is impacted.
  - v. Identify risks, assess impact level and probability, develop recommended risk responses.

**4) Move Management** – To include all UCD occupied spaces, with the exception of School of Medicine spaces in LSTE-E Building:

- a. Ensure successful space activation through collaboration with assigned move manager for all move logistics, including coordination with equipment, furniture, staff/stakeholders, and movers.
- b. Administrative, classroom, and support spaces to include office and storage spaces.
- c. Moves to include coordination with IT, School of Medicine (LLL Building), PO&M, Facilities Planning & Development, and regulatory agencies.
- d. Include equipment inventory, create an inventory of all equipment to be moved and their utility needs. The make, model and following specifications of equipment will be needed:
  - i. Electrical Requirements: Voltage, amperage, phase, plug type.
  - ii. Heat load Requirements: Heat load output of equipment
  - iii. Plumbing Requirements: Water supply, drainage, vacuum, compressed air.
  - iv. Mounting Requirements: Floor mounted, wall mounted, ceiling, table.
  - v. Seismic Requirements: If six feet or taller in height and 400 pounds or more in weight
  - vi. Alarm Requirements: Necessary for cold storage such as freezers and refrigerators (non-lab)

**5) Workflow Support:**

- a. Facilitate and develop workflows with end users and analyze/optimize existing operational workflows to utilize the built environment. Develop downtime procedures for each applicable workflow.
- b. Creation of workflows based on department and equipment location.
- c. Provide continuous business partner engagement and coordination.
- d. Ensure activation readiness.

**6) Building Readiness Walkthrough**

- a. Evaluate building readiness walkthroughs in preparation for major milestones.
- b. Evaluate new spaces and identifying and documenting potential risks - to be tracked on the Issues Management list.
- c. Manage Pre/post Certificate of Occupancy checklists (examples: exit signage, fire extinguishers, equipment initiation and user set-up).

**7) Licensing and Regulatory Support**

- a. Work with UCD's regulatory team to develop a licensing and regulatory plan to include though not limited to:
  - i. Institute of Animal Care Use Committee (IACUC) compliance,

- b. Create a timeline to accomplish required deliverables, applications, certifications, testing requirements for state and other accreditation requirements.
- c. Create a regulatory readiness plan to include milestone tracking, issues management process.

**8) Post Move Support & Stabilization**

- a. Maintenance of issue log and tracking of opening day action items.
- b. Ensure operational disruption is minimal.

**9) Meetings:**

Estimated cadence of meetings:

- a. January 2024 – April 2024, bi-weekly
- b. May 2024 – January 2025, weekly
  - i. November 2024 – January 2025, may be daily by department as needed.

**10) Schedules**

- a. Create one overall (1) master project schedule. Schedule to be phased, if necessary.
  - i. Provide a separate schedule per floor / department.
  - ii. Coordinate schedules with contractor finish dates and occupancy by floor.
  - iii. Coordinate and incorporate schedules with School of Medicine relocation management consultant.
    - 1. Collaborate with relocation management consultant as needed to provide final coordinated schedule.

Aspects associated with the critical services listed above include, but are not limited to:

- a. Developing detailed transition plans to address all operational needs for each department or user / floor; assume 10-15.
- b. Partnering with space planning, construction project managers, IT, PO&M, Regulatory Agencies, Facilities Planning and Development and movers on coordination efforts
- c. Creating transition plans detailing seat assignments for use by movers and related service providers.
- d. Communication of move details to stakeholders
- e. Executing transition scenarios on complex employee moves

If your firm intends to outsource a local consulting team to satisfy the need for day-to-day onsite resourcing, please indicate accordingly in the Qualification Statement.

The selected firm and consulting teams, if applicable, must demonstrate expertise in space programming, particularly in academic healthcare or university setting.

**SCREENING CRITERIA:**

- 1. Transition Planning Services:** Proven expertise with development, control, organizational advising, schedule, and budget management for clinical and administrative relocation projects of similar size and complexity. Ability to provide efficient and comprehensive management for all phases of this project, especially the capability to work in partnership with UC Davis Health staff, other consultants and contractors during both planning and implementation of the transition plan. Demonstrated track record of meeting schedule and budget requirements.

**Points: 40**

- 2. Team Staffing & Organization:** Clear definition of roles. Availability of staff and others to respond to the requirements of this assignment. Experience listed for personnel must be related to similar projects used to show the firm's experience and knowledge. Skills to be able to mediate issues and work broadly across the UC Davis Health organization from direct stakeholders to high-level decision makers.

**Points: 30**



3. **Resource Availability:** Experience with workload balancing and flexibility to provide staff and resources necessary to provide defined services, at the required project site in a timely manner. **Points: 30**

### SELECTION PROCESS AND SCHEDULE:

The selection of a firm will be accomplished by the following process. After Qualification Statements are received, a Screening Committee will review, conduct reference checks, and recommend a shortlist of firms for interviews. A Selection Committee will conduct the interviews. The target dates are listed below:

1 <sup>st</sup> Ad for services:	December 1, 2023
RFQ Statements due:	2 p.m. December 15, 2023
Screening completed:	December 18, 2023
Selected Firm Interviews:	December 20, 2023
Final Committee Selection:	December 22, 2023
Contracts	December 27-28, 2024
Kick-off meeting	January 2-5, 2024

### SUBMITTAL REQUIREMENTS:

Firm shall limit submittal to a maximum of six (6) double-sided 8 ½" x 11" letter sized sheets. Non-adherence to submittal requirements may disqualify the submission.

- A. Provide data on three (3) recent projects, each completed within the last 7 years, with a detailed project description demonstrating the firm's and your sub-consultants or joint venture partner's experience with transition planning for projects of similar size and complexity.
- B. Provide data / graphics demonstrating experience or knowledge for the three areas listed in the screening criteria above.
- C. List proposed staff demonstrating the firm's ability to fulfill the requirements of the Proposal. Show their years of experience, and years in lab/medical specific.
- D. Samples of your work product for both transition and relevant to the work described in this RFQ.
- E. Indicate your firm's agreement with the terms of the attached PSA.
- F. Attach a completed Consultant Statement of Qualifications form, available for download at the following link: <https://health.ucdavis.edu/facilities/work-with-us/consultants/rfq>
- G. All material should be in 11" x 17" format.
- H. ONE (1) pdf copy of your firm's statement of qualifications must be received no later than **2 p.m. Friday, December 15, 2023**, via upload link provided by Leila Couceiro, Contracts Manager. Applicants should request an upload link to Leila ([lccouceiro@ucdavis.edu](mailto:lccouceiro@ucdavis.edu)) no later than Thursday December 14, 2023.
- I. Questions about this RFQ should be directed via email only to Leila Couceiro at [lccouceiro@ucdavis.edu](mailto:lccouceiro@ucdavis.edu).