

**REQUEST FOR STATEMENT OF QUALIFICATIONS
FOR
Planning and Conceptual Design Services**

**THE UNIVERSITY OF CALIFORNIA, AGRICULTURE AND
NATURAL RESOURCES (UC ANR)**

**Locations Statewide, including Research & Extension
Centers in Fresno, Imperial, Mendocino, Orange, San
Mateo, Siskiyou, Tulare, Yuba, and Ventura Counties**

JULY 2025

ADVERTISEMENT FOR A REQUEST FOR QUALIFICATIONS

Planning and Conceptual Design Services
UNIVERSITY OF CALIFORNIA, AGRICULTURE AND NATURAL RESOURCES (UC ANR)

Locations Statewide, including Research & Extension Centers in Fresno, Imperial, Mendocino, Orange, San Mateo, Siskiyou, Tulare, Yuba, and Ventura Counties

Thank you for your interest in the Planning and Conceptual Design Services UC ANR Facilities. University of California, Agriculture & Natural Resources (University or UC ANR) is seeking qualifications from experienced firms to provide site planning consulting services for facilities statewide. The locations for these services include ten Research & Extension Centers (RECs) located throughout California. UC ANR is undertaking a wide range of site improvements at the RECs, which may include renovation or re-purposing of existing buildings or facilities, and/or development of new improvements from outdoor educational areas, new buildings, and research facilities (hereafter Project). The University intends to establish a list of firms that may be contracted on an as-needed basis for Planning and Conceptual Design services for a term of up to three years. Selected firms may be requested to submit project-specific proposals depending on the scope, location, and timing of the services required.

The full Design Professional Qualification Packet is available at <https://ucanr.edu/site/facilities-planning-management/projects-and-information-contractors> on **July 14, 2025** and includes the following items:

- Submittal Requirements and Insurance Requirements
- Scope of Services
- Statement of Qualifications form
- Selection Criteria to be used to review submissions and advance successful applicants to final interview.

Submit written statements of qualification to arrive no later than **Monday, August 4, 2025 by 5:00 PM** via email to **Vkovacevic@ucanr.edu**. At the University's sole discretion, submissions received later than this date and time may be rejected and returned unopened.

Questions regarding the submittal or the project may be addressed **by July 25, 2025 by 5:00 PM** to Violeta Kovacevic, Contract Administrator, UC ANR at Vkovacevic@ucanr.edu.

The University will convene a Screening Committee to review the submissions and rank the firms on their qualifications. Qualifying firms will be invited for interviews/presentations. The Selection Committee will notify only the shortlisted firms of interview time and place. Once a selection is made respondents will be notified. The University reserves the right to request any further documentation that it deems appropriate and necessary for the screening and selection process.

The University of California is an Equal Opportunity Employer – Minorities and women are encouraged to apply. Every effort will be made to ensure that all persons, regardless of race, religion, sex, color, and national origin have equal access to contracts and other business opportunities with the University. Each candidate firm will be required to show evidence of its equal employment opportunity policy.

In addition, the University is committed to promoting and increasing participation of small business enterprises (SBEs) and disabled veteran business enterprises (DVBES) relating to all goods and services covered under the awarded agreement, subject to any and all applicable obligations under state and federal law, and University

policies. The awarded contractor shall make best efforts to provide qualified SBEs and DVBEs with the maximum opportunity to participate. Please contact the University Representative for further information.

The University of California is requiring contractors and consultants to use University-designated data systems to track monthly payments, including those to certified subcontractors or subconsultants (SBE/DVBE/DBE/WBE) as well as non-certified. The University aims to achieve a minimum of 25% participation.

PRIVACY NOTIFICATION

The State of California Information Practices Act of 1977 requires the University to provide the following information to individuals who are asked to supply information about them:

The principal purpose for requesting the information on this form is for use in the selection process for Design Professionals commissioned by the University. University Policy authorizes maintenance of this information.

Furnishing all information requested on this form is mandatory - failure to provide such information will delay or may even prevent completion of the action for which the form is being filled out. Information furnished on this form will be used in the University's screening and selection process for awarding commissions to Design Professionals.

Individuals have the right to access this record as it pertains to them.

July 2025

SUBMITTAL AND INSURANCE REQUIREMENTS

Planning and Conceptual Design Services

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The full Design Professional Qualification includes the following items:

1. Submittal Requirements and Insurance Requirements.
2. Scope of Services
3. Statement of Qualifications form
4. Selection Criteria to be used to score the submissions and advance successful applicants to final interviews.

The screening committee will review the information submitted and based on the Selection Criteria, will select qualified candidates for interviews.

The submittal requirements are:

- **Cover Letter** (maximum of one page) that summarizes your firm's qualifications and provides main contact information.
- Complete the **Statement of Qualifications** form. In your response, please elaborate on a minimum of three projects listed in question 8 of the form. Please provide project data, photographs/graphics, and information on the design team members (both in-house and consultants). A well organized and succinct response is appreciated. The completed Statement of Qualifications form must be signed by a responsible member of the firm.
- Provide a **written narrative** (maximum 12 pages) that outlines your firm's specific approach to projects. Identify, by name and title of key staff members and proposed consultants who will be assigned to the project who will have a major role in the project. Briefly describe each member's proposed role and include their position on the project team. The written narrative shall include the following information:
 - Proposed approach to delivery of services for highlighted projects.
 - Description of each project and associated scope of work, including a client contact and phone number for at least three projects. Consultant's experience needs to be shown in the following areas:
 - Public buildings assessment and design.

- Building assessment and design services of multi-function buildings with administrative offices, labs, classrooms, and conference rooms.
 - University and/or other public institutional building projects that demonstrate sustainability achievements, such as decarbonization, water reclamation, and/or electrification.
- Experience of the team members to perform the required services as identified in the scope of work. Please provide resumes of the primary team member(s) assigned to the project with a statement regarding availability of each team member.
 - Describe whether or not any of the core A/E firms are presently for sale or involved in any transaction to expand or become acquired by another business entity. If so, explain the impact both in organizational and directional terms
- Submit other information or material that demonstrates your firm's ability in meeting the Selection Criteria.
 - Rate Sheet - Rate sheet is for informational purposes only, showing hourly fees for the Consultant, including rates or all key personnel included in the submittal.

The University requires evidence of insurance coverage, to be presented only after the successful firm(s) is selected to provide services. Submittal of insurance information is not required as part of the Statement of Qualifications. General Liability, Professional Liability Insurance, Business Automobile Liability, and Worker's Compensation will be required in the following minimal amounts. Increase amounts may apply to larger projects.:

1. General Liability:

Comprehensive or Commercial Form:	
Each Occurrence	\$1,000,000
Products/Completed Operations, Aggregate	\$2,000,000
Personal and Advertising Injury	\$1,000,000
General Aggregate (Not applicable to Comprehensive Form)	\$2,000,000

If the above insurance is written on a claims-made form, it shall continue for three years following termination of this Agreement. The insurance shall have a retroactive date of placement prior to or coinciding with the effective date of this Agreement.

2. Business Automobile Liability Insurance for owned, scheduled, non-owned, or hired automobiles with a combined single limit not less than one million dollars (\$1,000,000) per occurrence.

3. Workers' Compensation as required by California State law.

4. Professional Liability Minimum Insurance:

Each Occurrence	\$1,000,000
Project Aggregate	\$2,000,000

Increased professional liability may be required for larger projects. If the above insurance is written on a claims-made form, it shall continue for three years following termination of this Agreement. The insurance shall have a retroactive date of placement prior to or coinciding with the effective date of this Agreement.

5. Such other insurance in such amounts which from time to time may reasonably be required by the mutual agreement of the University and Consultant against other insurable hazards relating to the work to be done.

If the Consultant does not currently have coverage in accordance with University policies, then evidence should be submitted indicating that such coverage will be effective prior to entering into a contractual agreement with the



University. Depending on the complexity and scale of the project scope and delivery methods, the insurance requirements may increase.

Questions regarding the submittal or the project may be addressed via email **by Friday, July 25, 2025 by 5:00 PM** to Violeta Kovacevic, Contract Administrator, UC ANR at Vkovacevic@ucanr.edu .

Submit written statements of qualification to arrive no later than **Monday, August 4, 2025 by 5:00 PM** via email to Violeta Kovacevic, Contract Administrator at Vkovacevic@ucanr.edu, UC-ANR Facilities Planning & Management, 2801 Second Street, Davis, CA 95618.

At the University's sole discretion, submissions received later than this date and time may be rejected and returned unopened.

Scope of Services for Planning and Conceptual Design Services

UNIVERSITY OF CALIFORNIA, AGRICULTURE AND NATURAL RESOURCES (UC ANR)

Locations Statewide, including Research & Extension Centers in Fresno, Imperial, Mendocino, Orange, San Mateo, Siskiyou, Tulare, Yuba, and Ventura Counties

Overview

University of California, Agriculture & Natural Resources (UC ANR or the University) is seeking qualifications from experienced firms to provide site planning consulting services for facilities statewide. The University intends to establish a list of firms that **may be contracted on an as-needed basis for Planning and Conceptual Design services for a term of up to three years**. Selected firms may be requested to submit project-specific proposals depending on the scope, location, and timing of the services required.

The locations for these services include ten Research & Extension Centers (RECs) located throughout California. Project sites may include renovation or re-purposing of existing buildings or facilities, and development of new sites, buildings, or campuses. UC ANR's Facilities, Planning, and Management (FPM) group is based in the City of Davis, CA, which provides full contracting and project management services for all UC ANR construction projects. During the contract, the Executive Architect will have a dedicated project manager from FPM group and a dedicated ANR Facilities Operations member, located at the Research Center.

Scope of Services Needed:

The selected firm(s) will be responsible for the following tasks:

- Perform master planning and design studies: Selected Consultant will work closely with UC ANR to develop a vision and a building/site development program for the UC ANR facilities/location, as determined in the specific project scope.
- Team Coordination: Consultant will provide regular coordination with team, attend meetings and conference calls, and deliver ongoing project management during the process.
- Program Development & Cost Analysis: Develop comprehensive programming, phased planning, and cost analysis to guide future improvements.
- Collaboration & Coordination: Work collaboratively with the University of California, Agriculture & Natural Resources stakeholders, which may include but are not limited to internal teams, municipalities, external consultants, and facility managers, across multiple locations.
- Sustainability and Compliance: Propose design solutions that align with UCOP's decarbonization and sustainability goals and comply with the University of California's policies and procedures.
- Stakeholder Support: Assist in critical decision-making processes and ensure designs meet the functional and operational needs of the University.
- Ongoing Services: Selected firm may be required to act as the planner for a given location, providing ongoing support for a period of up to three years.
- Cost Estimating Services: Support cost estimating services at various project stages, including feasibility assessments, schematic design, design development, and construction documentation.

Executive Architect PROJECT Duties

- Preparation of initial design and site development concepts. This may include conducting design charrettes or similar activities to gather information, ideas, and feedback from UC ANR staff, leadership, and stakeholders.

- Strong understanding of all applicable codes and regulations, and the University of California's design requirements.
- Preparation of site and building pre-programming based on discussions with UC ANR staff and stakeholders, and the initial concepts.
- Prepare documents for site planning and conceptual design, potentially including:
 - Summary of project goals, initial pre-programming for size and location of building(s) and amenities, agricultural areas, parking, ingress/egress, and other site design components.
- Provide documentation of sustainability targets to guide the design process.
- Initial conceptual sketches (that articulate the various design elements) and submit conceptual design alternatives for UC ANR's review and input.
- Summarize anticipated project entitlements, including if required local approvals and permitting, and CEQA assumptions for UC ANR staff review.
- Visual presentations that include concise narratives, tables, precedent imagery, maps, and graphics. Conceptual design and final programming summary, including draft renderings to articulate the various design components and building/site features, as well as outdoor spaces, such as demonstration gardens/orchards, youth education components, extension programming locations, and/or other prominent features.
- Design Guidance Package that will be used to support a Design/Bid or Design/Build package. Design guidance documents will be highly visual and will incorporate diagrams, maps, photos, graphics, and renderings, to articulate the design guidance for a project and the ultimate vision for a project or a facility.
- Provide presentations and documents/visualizations to UC ANR staff, leadership, and stakeholder for review and comment. These presentations and deliverables will be focused on programming and conceptual design, and detailed architecture and schematic designs, which would be developed during a later design/build phase of a project.

Project may include additional planning and conceptual design tasks may include but are not limited to the following:

- Research and provide strategy support on needed planning, utility, and entitlements in close coordination with UC ANR project team and stakeholders.
- Attend site tours as necessary and conduct a photo survey of the site, existing buildings, utilities, neighboring uses, and other relevant features.
- Engage and attend meetings with local governments and regulatory agencies to identify potential infrastructure and entitlement strategies and solutions.

STATEMENT OF QUALIFICATIONS

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1. Firm Name: _____

2. Business Address: _____

3. Firm Established: Year: _____ Telephone: _____

4. Type of Organization: (Check one)

- | | | | |
|------------------------|--------------------------|------------------|--------------------------|
| a. Sole Proprietorship | <input type="checkbox"/> | b. Partnership | <input type="checkbox"/> |
| c. Corporation | <input type="checkbox"/> | d. Joint Venture | <input type="checkbox"/> |

5. If a sole proprietorship or partnership provides the required information for each Principal (P) and Associate (A) to be utilized on the project: (Check "P" or "A" for each). If a corporation, provide the names of the corporate officer responsible and the required information on each principal employee to be assigned to the project.

NAME	P	A	DEGREE OR CERTIFICATION	INSTITUTION

6. Average staff employed in home office: (Average of past 5 years)

- | | |
|-------------------------------|--------------------|
| a. Architects _____ | b. Surveyors _____ |
| c. Drafting Technicians _____ | d. Clerical _____ |
| e. Other _____ | |

7. California Professional License Number: _____

8. List 5 major projects constructed within the past 5 years that indicate your experience with similar projects:

PROJECT	OWNER	YEAR	PROJECT COST

9. References:

a. _____

b. _____

c. _____

By: _____

Title: _____

Date: _____

Please attach to this form any other information

SELECTION CRITERIA

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Selection Criteria

The University will review all proposals and rank the most qualified consultants to conduct planning and conceptual design services. The ranking will be based on the submittal requirements, listed above, and selected criteria, listed below. The order in which the criteria appear does not indicate importance, ranking or weighing that will be used in the evaluation. Proposal must not exceed 10 pages and shall provide sufficient information to allow the University to evaluate the Consultant's approach, experience, staff and availability.

Submittals will be in part evaluated by examination of the functional, technical, economic, and aesthetic quality of similar projects completed for the University or similar clients. Note that not all criteria will be weighted equally by the Committee, and that the following criteria are not necessarily listed in order of importance.

Coordination and Supervision. Evidence of ability to provide efficient and comprehensive management of consultant's responsibilities during all phases of design, bidding, and construction. Project team members that are experienced and 'appropriately match the requirements of their assigned project tasks. Extra merit for full project teams (internal firm members and members of consultant firms) with prior experience in like projects. Confirming statement that key staff members of the selected firm and consultant office(s) will participate in the full duration is a high priority.

Production Capability. Capability is evidence by the firm's ability to perform all programming, design, and document production phases of the specified work consistently with the program's schedule, budget, and technical requirements. Ability to produce documents of superior quality, consistent with the University of California and public sector bidding processes.

Design Philosophy. Incorporate proven technologies, material type, and construction methodology that is practical and is focused on first-time and life cycle costs while producing an aesthetically pleasing structure and surrounding exterior spaces.

Stakeholder Collaboration: Ability to work effectively with various stakeholders, including university staff, administration, facilities personnel, research and program staff, and external consultants, to ensure the conceptual design aligns with UC ANR's vision and goals.

Sustainability Expertise: Experience in delivering sustainable design solutions, including decarbonization and electrification projects, LEED certifications, and demonstrated effectiveness in energy and resource conservation.

Project Management: Strong experience in planning, design, and construction administration, including managing phased projects and ensuring timely delivery within budget constraints. Exceptional verbal and written communication skills in the preparation of clear reports and presentations, to facilitate good engagement with stakeholders at all levels of the organization.

Regulatory Experience: Experience navigating complex approval processes, including working with the campus and/or state fire marshal, local municipality(s), or the University of California building officials, and other governing bodies to secure necessary permits and approvals.

University Facilities Experience: Recent experience consulting, planning and/or designing buildings and facilities for universities or similar institutions. This could include uses such as classroom, offices, conference, labs, research facilities, and supportive shop and maintenance buildings, educational or engagement spaces, outdoor demonstration areas, and teaching gardens.

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

The University may select more than one firm depending on the needs of the facility, facility characteristics, and locations. The University shall negotiate with the highest ranked consultant(s) regarding the staffing, the rate schedule, and possible other terms of agreements. Negotiations may be formally terminated if such discussions fail to result in a contract within a reasonable amount of time.

The successful firm(s) will be required to sign one or more of the following agreements depending on the scope and delivery methods for each project. The agreements are available to view at <https://www.ucop.edu/facilities-manual/design-contract-templates/index.html>.

- Professional Services Agreement (PSA)
- Executive Design Professional Agreement (EDPA)
- EDPA Blanket Agreement
- Executive Design Professional Agreement Lite (EDPA Lite)
- Master Architect Agreement for Design-Build Delivery

-END-