

University of California, Riverside

**Request for Qualifications (RFQ)
for Developer and Project Oversight and Management
Staff Augmentation Services
for a Public-Private Partnership (“P3”) Project:**

**UCR NORTH DISTRICT DEVELOPMENT PROJECT
 (“NORTH DISTRICT” OR “PROJECT”)**

Advertisement Date: September 6, 2017 –September 20, 2017
Document Issue Date: September 6, 2017
Optional meeting for Respondents: September 12, 2017 10:00 AM
Notice of Intent due: September 15, 2017
Last day for Questions: September 15, 2017
Response Submittal Due by: September 22, 2017, 12:00 PM

Page Intentionally Left Blank

Table of Contents

I.	PROJECT INFORMATION AND REQUIREMENTS	1
A.	Introduction.....	1
B.	Campus Background.....	1
C.	Project Description.....	2
D.	Scope of Services.....	3
E.	Desired Experience	6
F.	Contract Requirements.....	7
	Minimum Requirement	7
II.	RFQ SUBMITTAL PROCESS.....	8
III.	SELECTION PROCESS	9
IV.	EXPERIENCE SUBMITTAL CONTENTS	11
A.	Cover Letter	11
B.	Organizational Roles and Responsibilities	11
C.	Consultant Team Qualifications	12
D.	Project Understanding and Approach	12
E.	Client References	12
F.	Litigation History.....	12
G.	Financial and Business Relationships	13
V.	SELECTION CRITERIA AND SCORING	13
A.	Consultant Qualifications.....	13
B.	Team Member Experience.....	13
C.	Approach and Understanding of Project and the Scope of Services	14
D.	Financial and Business Relationships.....	14
E.	References.....	14
VI.	ATTACHMENTS.....	15
	ATTACHMENT 1 – PROJECT MAP	16
	ATTACHMENT 2 – FORM OF CONFLICT OF INTEREST AGREEMENT AND DISCLOSURE STATEMENT (includes Schedule 1- Short List of Potential Developers)	17
	ATTACHMENT 3 - RFQ QUESTIONNAIRE & SUBMITTAL FORM	18

I. PROJECT INFORMATION AND REQUIREMENTS

A. Introduction

The University of California, Riverside (“UCR”, “UC Riverside” or “University”), through its Real Estate Services (“RES”) unit within the Capital Asset Strategies Department (“CAS”) in collaboration with its Architects and Engineering Department (“A&E”), currently is mobilizing to implement several projects using the public-private partnership (“P3”) project delivery model, and desires to retain various project-related services through a consultant as an augmentation of UCR staff assigned to support the expansion of campus via P3 development through the North District Development Project.

B. Campus Background

UC Riverside is one of 10 universities within the prestigious University of California (“UC”) system, and the only UC campus, as well as the only public research university, located in inland, Southern California. For an overview of UC Riverside, please refer to the Campus homepage at: <http://www.ucr.edu/>.

The campus is in the midst of substantial growth, with new and remodeled facilities coming on-line on a regular basis. Widely recognized as one of the most ethnically diverse and innovative research universities in the nation, UCR currently hosts approximately 23,000 students (as of Fall 2016), a population that is expected to grow to approximately 25,000 by 2020, and possibly 27,000 soon thereafter. UCR currently employs approximately 1,100 instructional faculty. In addition, UCR is implementing the UC Riverside Strategic Plan, which includes enlarging the faculty and the campus research profile. UCR also employs another 5,200 staff members, for a current total of approximately 6,300 faculty and staff members (not including student staff appointments).

The 1,127-acre UCR campus is located three miles east of downtown Riverside and is bisected by a freeway, consisting of the joint alignment of Interstate 215 (“I-215”) and State Route 60 (“SR-60”), also jointly denoted as “I-215/SR-60”. The 616 acres east of the freeway include most of the existing campus facilities; the 511 acres west of the freeway include agriculture research fields and support facilities, a large parking lot, administrative facilities, and University Extension. The physical setting of UC Riverside, at the base of the Box Springs Mountains, is an integral part of the educational experience for all those who come to live, learn, and work on campus. This relationship is vital to its students, faculty, and staff, as the campus is a living laboratory for the exploration of issues critical to growing communities – air, water, energy, transportation, politics, the arts, history, culture and healthcare. Please refer to the UC Riverside Campus map at <https://campusmap.ucr.edu/>.

The University is its own enforcement agency for all code requirements except for certain requirements of the fire code, access compliance with respect to state funded projects, and certain medical facilities. For these code requirements, University projects are subject to plan approval and enforcement authority by three state agencies: Office of the State Fire Marshal (SFM), Division of the State Architect/Access compliance (DSA-AC), and Office of Statewide Health Planning and Development (OSHPD) in addition to University review by the Delegated Campus Building Official.

C. North District Project Description

UCR is currently in a Request for Proposal (“RFP”) solicitation process with three (3) short-listed developer teams to address its current and future student housing needs by redeveloping the 50-acre Canyon Crest Family Housing site on East Campus, identified in the 2016 Physical Master Plan Study as the “North District” (http://cpp.ucr.edu/masterplan_study/).

The North District project (“Project”) is anticipated to provide approximately 4,000 to 6,000 new beds, upon completion of the final phase of development. The Project is envisioned to be constructed in no more than three phases. The Project is intended to provide residence hall housing for first year students, and apartment housing for second year students, transfer students, upper division undergraduate students, and graduate students. In addition, the Project is expected to deliver two (2) dining facilities, two (2) full size recreation fields¹, one (1) NCAA Division I competition soccer field², one (1) Field House facility, and various functional open spaces, multi-functional rooms (e.g., spaces that can alternate from classroom, meeting space, study area, etc.) – along with other student support amenities, a mix of retail services, and adequate utility capacity and supporting infrastructure to support all phases of the Project.

The first phase of the Project is envisioned to deliver:

1. 830-seat dining facility ready for occupancy by June 30, 2020;
2. 2,275 student housing beds ready for occupancy by July 2020;
3. Two (2) full size recreation fields;
4. One (1) NCAA Division I competition soccer field; and
5. One (1) Field House facility (connected with the competition field program).

The North District Project will establish a new, distinctive living-learning, mixed-use community that creates a sense of place. New student housing beds will be aligned with appropriate residential life programs that provide a balance of privacy and community to enhance the overall academic experience for UC Riverside students. These new beds will be provided within a community comprised of residence halls and a variety of apartment types. However, the Project will contain other elements, such as dining services, multi-functional spaces (e.g., meeting spaces, study areas, classrooms), retail services and amenities, recreational fields, parking, infrastructure, and utilities.

The University is in the process of selecting a preferred developer team for the Project. It is anticipated the preferred developer will be selected in October 2017 and key business terms will be approved by the UC Regents by early 2018.

¹ Recreation Field(s): Full size sports field(s) intended to support practices, games and tournaments for students who participate in UC Riverside Club Sports, Intramural Sports and free play sports teams (e.g., Soccer, Lacrosse, Rugby, Ultimate Frisbee, etc.), and these fields may also support practices for certain UCR Athletics programs (e.g., Men’s and Women’s Soccer).

² Competition Field: Is intended to support UC Riverside NCAA Division I - Men’s and Women’s Soccer games (i.e., Non-Conference, Conference, Tournaments and Post-Season games)

An overview of the developer selection process for the Project is as follows:

1. The Stage 1 Request for Proposal (RFP) was released on April 23, 2017, to eight (8) developers that sit on the approved bench of student housing developers as part of the UC System-wide Student Housing Initiative. **Stage 1 RFP links:** [Stage 1 RFP](#), [Stage 1 RFP Appendix 1](#)
2. The Stage 2 RFP for the Project was released on June 21, 2017, to a shortlist of three (3) developer teams. **Stage 2 RFP links:** [Stage 2 RFP](#), [Stage 2 RFP Addendum 1](#), [Stage 2 RFP Addendum 2](#), [Stage 2 RFP Addendum 3](#), [Stage 2 RFP Addendum 4](#), [Stage 2 RFP Addendum 5](#)
3. The campus will host two (2) charrette meetings with each of the three (3) short-listed developer teams. The first occurred on July 26-27, 2017, and the second occurred on August 30-31, 2017.
4. Final developer selection will occur in October 2017.

For more information, please see our website: http://res.ucr.edu/north_district.html

The short-listed developer teams and their respective supporting team members are shown in **Attachment 2: Form of Conflict of Interest Agreement and Disclosure Statement – Schedule 1. Short Listed Developer Teams**. The selected Consultant must not have material conflicts of interest due to financial and/or other business relationships with members of these short-listed teams.

Detailed information, such as pending performance specifications and other project-related materials, will be provided to the Consultant team selected to provide services for the Project. In the meantime, background information about the Project can be provided upon request.

Entitlement and environmental studies for the project are to begin immediately upon developer selection. The Project is envisioned to be delivered in no more than three phases, with construction estimated to commence in late Fall of 2018 or early Winter 2019, with the first phase of the Project delivered by June-August 2020.

D. Scope of Services

UCR desires to retain a Consultant Team (“Consultant”) who will provide services to the University on an as-needed, hourly basis to perform functions customary to an Owner’s Representative and Project Manager for a P3 project. Services provided by the Consultant are “at will” for the first phase of the Project and will be at the sole discretion of the University.

The Consultant needs to thoroughly understand the fundamental roles, relationships and transference of risk between the third party developer and the University, as well as for a qualified non-profit entity (all entities referred to as “Parties”) if a tax-exempt bonding financing structure is utilized to financing the Project. Furthermore, the University will be drawing on the Consultants knowledge and experience to best advise the University in the drafting and negotiating of the Project’s transaction documents (e.g.,

development agreement, ground lease, guaranty, construction rider, etc.) with the selected developer and/or non-profit entity. In addition to understanding the fundamental structure of a P3 transaction the Consultant will be responsible for facilitating and overseeing the adherence of all Parties to the terms and conditions stated in the Project's transaction documents.

Consultant must have expertise in, and the ability to assign personnel and to hire sub-consultants (if needed) to assist with, the oversight and direction of UCR's team, to provide P3 Developer and Project Oversight and related staff augmentation for the following services and areas, including but not limited to:

- **Review/Monitoring of Transaction Documents** – Includes agreements that are customary for a P3 project under the following financing scenarios:
 - Tax-exempt bond financing where a qualified non-profit entity is the borrower of the bond proceeds and is also the owner of the leasehold interest via a ground lease; and
 - Developer and/or private equity is utilized to finance the project.
- **Developer and Project Oversight/Management** – To facilitate and oversee adherence of all Parties to the Project's agreed and executed transaction documents, as well as to oversee and monitor the P3 Developer's performance of its obligations to deliver the Project on time and on budget.
- **Code Compliance** – The University is the Authority Having Jurisdiction ("AHJ") and the Consultant will need to provide oversight that the Project developer is properly coordinating with the Campus Building Official ("CBO") and Delegated Campus Building Official ("DCBO") for review and approval of plans, building/facility inspections, all Special Testing, Inspection and Observations in accordance with the California Building Standards Codes, Construction Meetings (as needed), receiving the Notices to Proceed ("NTP"), Certificated of Occupancy ("COO") and any other related approvals. In addition to coordination with the CBO and DCBO, the Consultant will need to oversee and monitor adherence to the Project Developer's obligations to properly coordinate with the Designated Campus Fire Marshal (DCFM) for fire/life safety review and approval of plans, fire life safety inspections and any other related approvals.
- **Environmental / CEQA Documentation** – Support the UCR team in any Mitigation Monitoring and Reporting Program ("MMRP") for the Project.
- **Construction and Architectural Consultation** – Participate with the UCR team in internal design charrettes with developer and/or non-profit leasehold owner.
- **Construction Management** - Typically the P3 developer would be responsible for this role, so the University would draw on the Consultant's ability to perform this function and/or expertise only if needed.
- **Quality Assurance/Control Oversight** - Typically the P3 developer would be responsible for this role, so the University would draw on the Consultant's ability to perform this function and/or expertise only if needed.
- **Technical Analysis and Support** – Provide requested analysis and support, which may include, but not be limited to:
 - Planning, Technical Design & Engineering
 - Civil Engineering expertise
 - Transportation / Parking Analysis
 - Planning Support
 - Peer Review

- Cost Estimation and Auditing Services
- Value Engineering
- Review of Change Orders

The selected Consultant must commit to providing a lead project management professional to direct the Consultant's team and to be the Consultant's prime representative to UCR throughout the duration of the contract. Only firms with established Southern California offices will be considered.

The following basic staff roles/functions are required to be available as part of the Consultant's team:

1. Principal / Project Executive (primary contract)
2. Senior Project Manager (primary contact) (Licensed Architect, Registered Engineer or have a degree in Construction Management and Certified as a Construction Manager).
3. Senior Contract Manager
4. Schedule and Cost Analysts, as needed
5. Project Admin/Records Management
6. Peer Reviewers, as needed

The Consultant's team is expected to remain available to the University throughout the pendency of the Project, as requested by the University. The Consultant will be responsible for managing its team and providing adequate staffing levels to perform any of the above-referenced staff augmentation services upon request by the University, to be able to increase or decrease the number of personnel supporting the University staff to address the needs of the projects. In addition, it is expected that the selected Consultant may have one or more sub-consultants on a "bench" from which to draw to perform the scope of services.

The Consultant will report directly to University staff making recommendations and providing oversight on project development, project management, design, and construction. Additionally, the ideal consultant will have a depth of resources with appropriate levels of experience to be able to augment, bolster, and provide support for UCR's professional internal Project Management staff, to form a seamless and integrated team.

E. Desired Experience

The selected Consultant will successfully demonstrate substantial experience in the following areas:

- Project management of complex higher education facilities, including experience within the University of California system
- Experience managing, administrating, and analyzing project budgets, estimates, schedules, phasing and scope through the various contracts necessary to complete the project
- Alternative project delivery, including public-private partnership (P3), as well as providing similar services on a UC campus
- Experience with and demonstrated knowledge of complex transaction documents (e.g., ground lease, development agreement, guaranty, construction rider, etc.) typical with a university P3 project
- Demonstrated experience with P3 developer and project oversight and management duties
- Multiple projects having construction cost greater than \$300,000,000 (between 3 to 5 projects in the last 7 years)
- Preparation of project/program documents, developing and articulating project design and performance criteria, and establishing clear goals and documentation for a P3 project delivery
- Sector-specific experience (e.g., student housing, parking, dining, recreation fields, etc.)
- Ability to audit life cycle cost analyses
- Short-term and long-term project planning
- Cost estimating
- Value Engineering
- Project Cost Budgeting
- Proven ability to review, assess and maintain project schedule
- Code Compliance Review
- Architectural and Construction Peer Review
- Familiarity with:
 - UC Policies related to development and construction
 - University of California (UC) contracts
 - UC project approval process and other UC requirements
 - Quality control relative to project management aspects of various engineering reports
 - California Public Contracts Code
 - ADA compliance requirements
 - California Environmental Quality Act (CEQA) as applicable to the development of large-scale capital improvement projects
 - California Building Standards Codes

F. Contract Requirements

1. All consulting services to be provided by the consultant shall be in accordance with the approved University Contract Document in the form of the University Standard Form of Professional Services Agreement (PSA).
 - a. Note any exceptions to the attached agreement (PSA) that would prevent your firm from executing the Agreement in your response. We cannot accept any request to include language to modify liability with regards to insurance and/or modify the indemnification clauses.
2. University requires evidence of insurance coverage: general liability, automobile liability, and worker’s compensation. If consultant does not currently have coverage in accordance with University requirements, listed below, documentation shall be submitted indicating that such coverage will be in place prior to execution of the Consultant Agreement. **See also Attachment 3 to this RFQ, which must be completed and submitted with the Response.**

<u>Commercial Form General Liability Insurance* - Limits of Liability</u>	<u>Minimum Requirement</u>
Each Occurrence-Combined Single Limit for Bodily Injury & Property Damage	\$5,000,000
Products - Completed Operations Aggregate	\$2,000,000
Personal and Advertising Injury	\$1,000,000
General Aggregate	\$5,000,000

<u>Business Automobile Liability Insurance* - Limits of Liability</u>	<u>Minimum Requirement</u>
Each Accident - Combined Single Limit for Bodily Injury and Property Damage	\$1,000,000

<u>Workers’ Compensation and Employer’s Liability**</u>	<u>Minimum Requirement</u>
Workers’ Compensation:	(as required by Federal and State of California law)
Employer’s Liability:	
Each Employee	\$1,000,000
Each Accident	\$1,000,000
Each Policy	\$1,000,000

<u>Professional Liability Insurance* – Limits of Liability</u>	<u>Minimum Requirement</u>
Each Occurrence	\$5,000,000
General Aggregate	\$3,000,000

**This insurance must be (i) issued by companies with a Best rating of A- or better, and a financial classification of VIII or better (or an equivalent rating by Standard & Poor or Moody's) or (ii) guaranteed, under terms consented to by the University (such consent to not be unreasonably withheld), by companies with a Best rating of A- or better, and a financial classification of VIII or better (or an equivalent rating by Standard & Poor or Moody's). Further, the deductible, or retained limit, for each coverage shall not be more than \$100,000.*

***This insurance must be issued by companies (i) that have a Best rating of B+ or better, and a financial classification of VIII or better (or an equivalent rating by Standard & Poor or Moody's); or (ii) that are acceptable to the University.*

3. Selected firm shall provide evidence of an Equal Employment Opportunity policy, and its compliance with applicable federal law pertaining to Equal Employment Opportunity.

II. RFQ SUBMITTAL PROCESS

In accordance with established University procedures, UC Riverside will review all submittals in response to the RFQ and will select the most qualified firm.

A. RFQ Schedule

The anticipated schedule for the RFQ process is below:

Activity	Schedule*
Release of RFQ	September 6, 2017
Optional meeting for Questions from Respondents**	September 12, 2017
Deadline for Questions	September 15, 2017
UCR answers to questions received by Deadline	September 18, 2017
Deadline for Responses to RFQ (time)	September 22, 2017, 12:00 PM (Pacific time)
Respondent Interviews (if needed, at UCR option)	October 2017
Selection and Award	October 2017

* *The University may update and revise the above-scheduled dates at its sole discretion.*

** *Optional meeting location for respondents: 1223 University Avenue, Suite 210-16, Riverside, CA 92521*

B. Instructions

The complete RFQ packet is available (in electronic format only) on the date listed above; Interested parties may download it directly from: <http://ae.ucr.edu/business/consultants.html>.

Questions may be addressed by email to Thomas Toepfer at thomas.toepfer@ucr.edu. **The last day to submit questions is September 15, 2017, 12:00 PM Pacific time. It is the University's intent to answer questions received by this deadline on or before September 18, 2017 in an Addendum. The Addendum will be posted on our website and sent to those firms who have given their Notice of Intent.**

Responses to the RFQ must be received on or before 12:00 PM, on Friday, September 22, 2017.

Responses must be submitted by one (1) hardcopy and on two (2) flash drives, in PDF format to the addressee below. All material submitted becomes the property of UCR and will not be returned to responding Consultant. Email, fax or telephonic submissions will not be accepted. **EMAIL SUBMISSIONS AND LATE SUBMISSIONS, FOR ANY REASON, WILL NOT BE ACCEPTED.** Address Responses to:

Raoul Amescua, Executive Director, Real Estate
Attn: Contracts Administration, Nelly Zaki*
UNIVERSITY OF CALIFORNIA, RIVERSIDE
1223 University Avenue, Suite 240
Riverside, CA 92507

****Include "RFQ for Project Management and Owner's Representative Staff Augmentation for the UCR North District Development Project" on the outside of your envelope***

A map of the Campus is available at: <http://www.parking.ucr.edu/services/Inside.pdf>.

III. SELECTION PROCESS

In accordance with established University procedures, UC Riverside will review all Responses and will select the most qualified Consultant for the services, taking into consideration the Desired Experience section described in Section I, part E, and the Selection Criteria and Scoring described in Section V, below.

A. Selection

The selection process will proceed as follows:

1. The University Screening Committee will evaluate each RFQ Submittal and will rank the prospective firms based on the criteria provided in this RFQ.
2. The highest ranked firms will be recommended to the Selection Committee. The Selection Committee will review the finalists and make a recommended selection for review and approval.
3. After review of the submittals the University will schedule interviews with the top ranked firms.
4. If the University receives submissions from fewer than three qualified firms, the University may select from the available qualified firms.
5. The University reserves the option to select no firm and/or to cancel the RFQ should the need arise.

B. Negotiation and Award of Contract

1. The University will negotiate a contract with the best ranked qualified firm for services at compensation that the University determines as fair and reasonable.
2. Negotiations shall begin within 5 days after the successful firm has been notified of its selection, unless the written notice provides that additional time is necessary to begin negotiations.
3. The University and firm shall work together to ensure the successful delivery of the requested services in a timely fashion.
4. In the event an impasse is reached in negotiations, the University may terminate negotiations and enter into negotiations with the next qualified firm, in the same manner as prescribed below.
 - a. Should the University be unable to negotiate a satisfactory contract with the firm considered to be the most qualified, at a price the University determines to be fair and

reasonable, negotiations with that firm shall be formally terminated in writing by the University.

- b. The University shall then undertake negotiations with the second most qualified firm. Failing accord with the second most qualified firm, the University shall terminate negotiations in writing. The University shall then undertake negotiations with the third most qualified firm.
- c. Should the University be unable to negotiate a satisfactory contract with any of the selected firms, the University shall select additional firms in order of their competence and qualification and continue negotiations in accordance with these Instructions until an agreement is reached.
- d. Upon the completion of negotiations, the University and the firm shall proceed to execute a contract. The University shall provide the firm the contract within 45 days after the conclusion of negotiations, unless the University notifies the firm that additional time is necessary to complete the contract.
- e. If the selected firm fails to execute the contract within 14 days of receipt, the University may formally terminate the negotiations with that firm in writing and undertake negotiations with the second most qualified firm and so on as previously described above.
- f. The University reserves the option to select no firm and/or to cancel the RFQ should the need arise.

IV. EXPERIENCE SUBMITTAL CONTENTS

Prospective firm shall submit the following information in the specified order:

A. Cover Letter

Submit a cover letter on company letterhead. This document will serve as the executive summary to convey your Consultant's qualifications and distinguished accomplishments. Identify the individual UCR should contact for further information or to arrange for an interview, along with their title, address, telephone number, and email address. Please also provide the following information:

- a. Number of years in business
- b. Number of employees
- c. Office that will be assigned

Cover letter shall not exceed two (2) pages.

B. Organizational Roles and Responsibilities

- a. Submit an organization chart showing each key person proposed to support this contract, including subconsultant(s), where known.
- b. Please provide a supporting narrative describing the roles and responsibilities of each firm and each key person proposed to support this contract.

This Section B shall not exceed 10 pages.

C. Consultant Team Qualifications

- a. Submit qualifications that are responsive to the Desired Experience in Section I, part E, above, and to the Selection Criteria in Section V, below.
- b.
- c. Describe the Team's, or Team members' experience in working together on past projects similar to the Primary P3 Projects.
- d.
- e. Resumes for each team member. Resumes should include:
 1. Relevant experience and qualifications, including current and past positions and employers for at least the last 7 years (or since commencing full-time work, if less than 7 years)
 2. Education summary listing institutions attended and degrees received
 3. Professional licenses, certifications and registrations currently held (and expiration dates, if applicable)
 4. Relevant publications, awards, and technical and innovative contributions to the industry

This Section C shall not exceed 10 pages (excluding resumes, which may be placed in an appendix)

D. Project Understanding and Approach

- a. Understanding of scope of services
- b. Proposed approach to the services and projects

E. Client References

- a. Provide at least two (2) **public agency client references** for the lead Consultant and any sub-consultants anticipated to perform 25 percent or more of the services. Provide the name of the client and contact information including their title, organization, location, telephone number, and email address.
- b. Attach a copy of applicable letters of recommendation or client testimonials, if available.

This Section E shall not exceed 10 pages, including any such attachments.

F. Litigation History

List all litigation in the past 10 years including:

- a. Litigation filed by clients against your firm, including relief sought and nature of dispute
- b. Litigation filed by your firm against clients, including relief sought and nature of dispute
- c. The final resolution, including type/amount of relief granted, for each matter (indicate "pending" if not yet resolved)

G. Financial and Business Relationships

List current and recent (within the past 24 months) financial and business relationship with any of the potential developer team members listed in Schedule 1 of the Form of Conflict of Interest Agreement and Disclosure Statement provided in Attachment 2. As described in Project Description, in Section I., part C of this RFQ, the selected Consultant must not have material conflicts of interest due to financial and/or other business relationships with members of these short-listed teams.

Respondents do not need to complete the form of agreement in Attachment 2 at this time. However, the response to this section of the RFQ should include the same types of financial and business relationships that would be subject to disclosure and mitigation through such agreement upon selection.

The University reserves the right to request additional information regarding the response to this section prior to making its selection of a Consultant pursuant to this RFQ.

Details in response to this requirement deemed by respondent to be proprietary and confidential may be marked as such and submitted separately, along with and by the same process and due dates noted previously.

V. SELECTION CRITERIA AND SCORING

The Responses and Interviews will be evaluated based on the following criteria:

A. Consultant Qualifications

- a. Team structure and qualifications of assigned key personnel
- b. Demonstrated competency of Consultant and any identified sub-consultants to perform the services outlined in "Scope of Services," in Section I, part D of this RFQ. Factors considered may include, but not be limited to:
 1. Track record of providing similar services to higher education institutions
 2. Track record of providing similar services to UC Riverside and/or other UC campuses

B. Team Member Experience

- a. Direct experience of the proposed team members, from the lead project manager to administrators, in the areas of Service and Desired Experience (as referenced in Section 1 Part E) outlined in this RFQ. Factors considered may include, but not be limited to:
 1. Experience working with higher education institutions on similar projects
 2. Experience working with UC Riverside and/or other UC campuses on similar engagements
 3. Sector-specific experience (e.g., student housing, dining, recreation, parking, etc.)

C. Approach and Understanding of Project and the Scope of Services

- a. Clarity and completeness of explanation of how the Consultant Team will perform the services, individually and comprehensively. Factors considered may include, but not be limited to:
 - 1. Approach to providing the diversity of desired services
 - 2. Approach to being flexible and responsive to evolving expertise needs
 - 3. Approach to working with multiple team members, including University staff and various Consultants
 - 4. Project understanding and integrating the scope of work for the project
- b. Understanding of applicable State of California and UC policies and processes for similar projects, including, but not limited to, CEQA, sustainability, Access/ADA, fire, life-safety, and seismic.

D. Financial and Business Relationships

- a. Ability to provide independent advice to University, without conflicts of interest due to material financial and business relationships with potential developer team members for this P3 Project. Factors considered may include, but are not limited to:
 - 1. Extent, timing, and duration of financial and business relationships disclosed, including clarity and completeness of such disclosures
 - 2. Roles of proposed key personnel, if any, in current or recent financial and business relationships
 - 3. Ability to manage and/or mitigate any existing or potential conflicts of interest

Consultants having a conflict or conflicts that the University determines, at its sole discretion, cannot be reasonably mitigated, may be eliminated from further consideration.

E. References

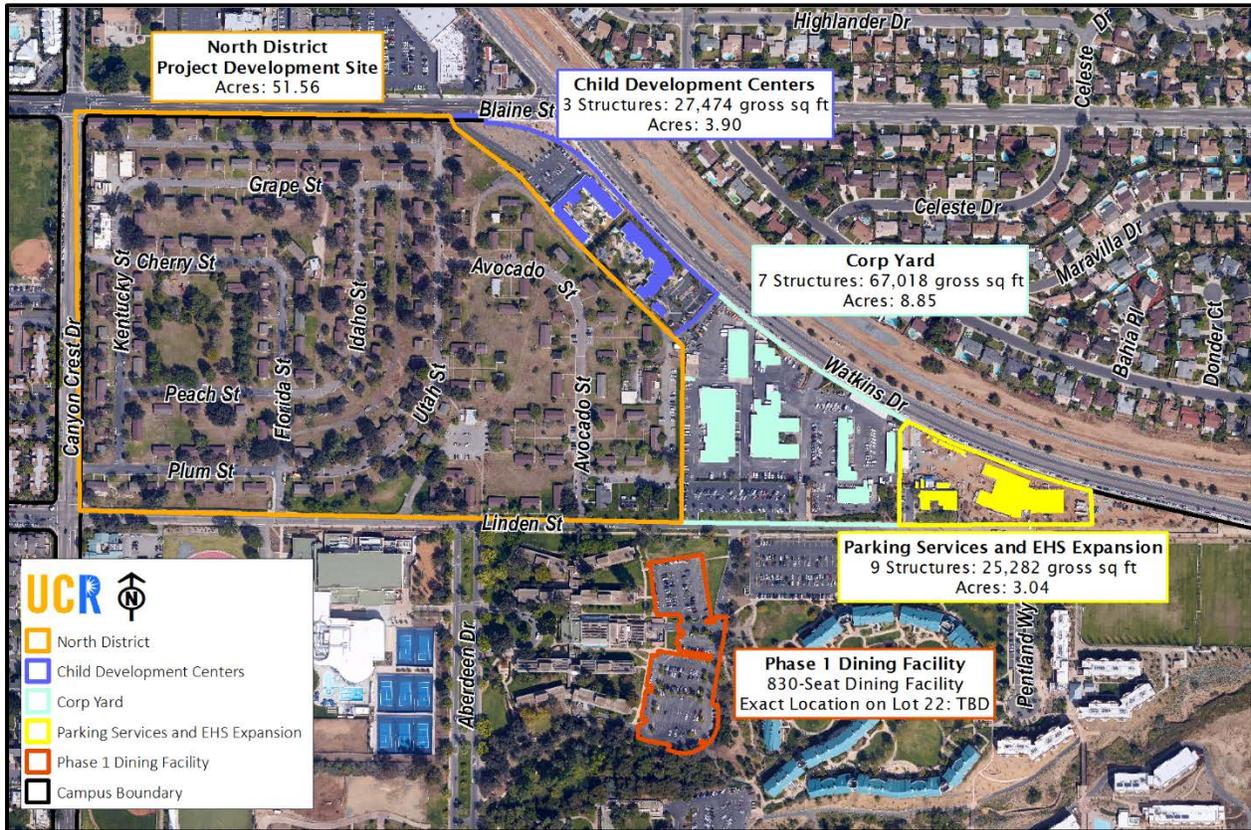
- a. Confirmation by references of assigned personnel, nature of work, responsibilities, outcomes, and client satisfaction.

Scoring Method

Criteria Category	Rating Range	Weight	Max Score
Consultant Qualifications	1-10	5	50
Team Member Experience	1-10	6	60
Approach and Understanding of the Scope of Services	1-10	6	60
References	1-10	3	30
Total	4 - 40	NA	200

VI. ATTACHMENTS

ATTACHMENT 1 – PROJECT MAP



**ATTACHMENT 2 – FORM OF CONFLICT OF INTEREST AGREEMENT AND DISCLOSURE
STATEMENT (including Schedule 1 – Short-Listed Developer Teams)**

CONFIDENTIAL

University of California, Riverside

UCR North District Project – Staff Augmentation Services

Participant Name: _____

Conflict of Interest Agreement

I, _____, hereby agree as follows: I have disclosed any potential conflicts of interest on the attached Disclosure Statement, or alternatively, I hereby certify that to the best of my knowledge, I do not have a conflict of interest, either real or apparent, as a result of a direct or indirect financial interest on my part nor of my employer, in any firm under consideration for the development of the UCR North District Project (the "Project"). I have reviewed Schedule 1 to the Disclosure Statement for the list of such firms. I agree not to solicit or accept gratuities, unwarranted privileges or exemptions, favors or anything of value from any firm under consideration for the Project, and I recognize that doing so may be contrary to statutes, ordinances and rules governing or applicable to the University of California or otherwise may be a violation of the law.

- No Disclosure Statement Required
- See Attached Disclosure Statement

Signature

Date

Printed Name

Printed Title

Representing

CONFIDENTIAL

University of California, Riverside

UCR North District Project – Staff Augmentation Services

Participant Name: _____

Disclosure Statement

This Disclosure Statement outlines potential conflicts of interest, either real or apparent, as a result of a direct or indirect financial interest on my part or that of any member of my immediate family, or of my employer, partner(s), or joint venture members, in any firm under consideration for the UCR North District (the "Project"). See Schedule 1 to this Disclosure Statement for the list of such firms. Section I of this Disclosure Statement describes the potential conflicts of interest. Section II of this Disclosure Statement describes the plan for managing the potential conflicts ("management plan") of interest as described in Section I of this form.

Section I: Description of Potential Conflicts of Interest

Section I of this Disclosure Statement describes the potential conflicts of interest. Attach additional pages as necessary.

CONFIDENTIAL

University of California, Riverside

UCR North District Project – Staff Augmentation Services

Participant Name: _____

Section II: Management Plan

Section II of this Disclosure Statement describes the management of potential conflicts described in Section I. Attach additional pages as necessary.

CONFIDENTIAL

University of California, Riverside

UCR North District Project – Staff Augmentation Services

Participant Name: _____

I acknowledge that the University may require revisions to the management plan described in Section II prior to approval and that the University has the right in its sole discretion, to limit or prohibit my involvement in the Project, including but not limited to the review of work performed and deliverables provided by a firm listed in Section 1 of this form, as a result of the potential conflicts of interest described in Section 1 of this form.

Signature

Date

Printed Name

Printed Title

Representing

Approved

Denied

By the University of California, Riverside

Signature

Date

Printed Name

Printed Title

CONFIDENTIAL

University of California, Riverside

UCR North District Project – Staff Augmentation Services

Participant Name: _____

Schedule 1		
Short List of Potential Developers *		
6/26/2017		
Developer	Other Team Members	
<ul style="list-style-type: none"> • American Campus Communities 	Development Team	Firm Name
	Developer	American Campus Communities
	Physical Master Planner	Walker Macy
	Architect(s)	Solomon Cordwell Buenz
	General Contractor	C.W. Driver
	Facilities Manager	American Campus Communities
	Civil Engineer (Transportation Specialist)	KPFF
<ul style="list-style-type: none"> • CA Student Living 	Development Team	Firm Name
	Developer	CA Student Living
	Physical Master Planner	Perkins+Will
	Architect(s)	Perkins+Will
	General Contractor	PCL Construction
	Facilities Manager	CA Student Living
	Civil Engineer (Transportation Specialist)	Kimley-Horn
<ul style="list-style-type: none"> • EdR 	Development Team	Firm Name
	Developer	EdR
	Physical Master Planner	Ayers Saint Gross
	Architect(s)	AC Martin
	General Contractor	Clark Construction Group
	Facilities Manager	EdR
	Civil Engineer (Transportation Specialist)	Psomas
	Dining Consultant	Envision Strategies and Webb Foodservice Design
	Sustainability Specialist	Brightworks Sustainability

* Developers are listed in alphabetical order

ATTACHMENT 3 - RFQ QUESTIONNAIRE & SUBMITTAL FORM

SUBMIT ONE HARD COPY & TWO ELECTRONIC FILES ON TRANSFERABLE MEDIA NO LATER THAN THE RFQ DEADLINE.

**Attachment 3
RFQ QUESTIONNAIRE & SUBMITTAL FORM**
For
Request for Qualifications for
Project Management and Owner's Representative
Staff Augmentation Services

FOR THE

NORTH DISTRICT DEVELOPMENT PROJECT (NORTH DISTRICT PROJECT)
UNIVERSITY OF CALIFORNIA, RIVERSIDE
(09/06/2017)

SUBMITTED BY:

(Company Name. If a Joint Venture, state name of JV Entity)

Type of Organization: Sole Proprietor/Individual Partnership
 Joint Venture
 Corporation

(State of Incorporation)

(Contact Name & Title)

(Street Address)

(City, State, Zip Code)

(Telephone Number) (Facsimile Number)

(E-mail)

Each prospective firm must answer all of the following questions and provide all requested information.

All information submitted for prequalification evaluation in response to Section 2, if applicable, and marked as "confidential" will be considered official information acquired in confidence, and the University of California will maintain its confidentiality unless (1) the University determines that it is required to release the information to a third party pursuant to the requirements of the California Public Records Act or (2) the University is required by court order to release the information to a third party pursuant to the requirements of the California Public Records Act. In the event that the University receives a request pursuant to the California Public Records Act and the University determines that it is required to disclose information marked "confidential" by the provisions of the California Public Records Act, the University will notify the prospective firm of the pending disclosure at least 72 hours prior to such disclosure so that the prospective firm

may seek a restraining order in advance of such disclosure. The University shall err on the side of transparency and will generally treat information provided by the prospective firm that is not marked “confidential” as subject to disclosure pursuant to the California Public Records Act. Likewise, any decision by the University that any document is subject to disclosure pursuant to the California Public Records Act shall not prevent the University from making a subsequent determination that any document is not subject to disclosure pursuant to the California Public Records Act. All other information submitted for evaluation will be considered official information acquired in confidence, and the University will maintain its confidentiality to the extent permitted by law.

1. SURVEY (Information Only) How did you hear about this RFQ?

UCR Website

Other:

2. INSURER (Pass/Fail Section) Failure to provide the required information or check boxes marked as “Pass” will result in the rejection of submitting entity from this Qualification.

Prospective firm shall obtain and submit the Insurance Declaration in the form shown below, or submit a sample certificate of insurance form from its insurer, or submit a letter that declares the same as the Insurance Declaration, signed by an authorized representative of its insurer on the representative’s or insurer’s letterhead. (If more than one insurer or insurance representative, submit a completed form or sample certificate of insurance form or letter for each).

2.1 Is the firm able to obtain insurance in the following limits for the required coverages?

YES (PASS) NO (FAIL)

<u>Commercial Form General Liability Insurance* - Limits of Liability</u>	<u>Minimum Requirement</u>
<u>Each Occurrence - Combined Single Limit for Bodily Injury and Property Damage</u>	<u>\$5,000,000</u>
<u>Products - Completed Operations Aggregate</u>	<u>\$2,000,000</u>
<u>Personal and Advertising Injury</u>	<u>\$1,000,000</u>
<u>General Aggregate</u>	<u>\$5,000,000</u>
<u>Business Automobile Liability Insurance* - Limits of Liability</u>	<u>Minimum Requirement</u>
<u>Each Accident - Combined Single Limit for Bodily Injury and Property Damage</u>	<u>\$1,000,000</u>
<u>Workers’ Compensation and Employer’s Liability**</u>	<u>Minimum Requirement</u>
<u>Workers’ Compensation:</u>	<u>(as required by Federal and State of California law)</u>
<u>Employer’s Liability:</u>	
<u>Each Employee</u>	<u>\$1,000,000</u>
<u>Each Accident</u>	<u>\$1,000,000</u>
<u>Each Policy</u>	<u>\$1,000,000</u>
<u>Professional Liability Insurance* – Limits of Liability</u>	<u>Minimum Requirement</u>
<u>Each Occurrence</u>	<u>\$5,000,000</u>
<u>General Aggregate</u>	<u>\$3,000,000</u>

*This insurance must be (i) issued by companies with a Best rating of A- or better, and a financial classification of VIII or better (or an equivalent rating by Standard & Poor or Moody’s) or (ii) guaranteed, under terms consented to by the University (such consent to not be unreasonably withheld), by companies with a Best rating of A- or better, and a financial classification of VIII or better (or an equivalent rating by Standard & Poor or Moody’s). Further, the deductible, or retained limit, for each coverage shall not be more than \$100,000.

**This insurance must be issued by companies (i) that have a Best rating of B+ or better, and a financial classification of VIII or better (or an equivalent rating by Standard & Poor or Moody’s); or (ii) that are acceptable to the University.

2.2 Insurance Declaration:

PROVIDE THIS DECLARATION TO YOUR INSURANCE CARRIER FOR COMPLETION AND HAVE YOUR CARRIER RETURN THE COMPLETED DECLARATION TO YOU. THE PROSPECTIVE FIRM MUST SUBMIT THIS DECLARATION TO UNIVERSITY. DO NOT HAVE YOUR CARRIER SUBMIT THIS DECLARATION DIRECTLY TO THE UNIVERSITY

The undersigned declares under penalty of perjury that the below named insurer is currently willing to provide the insurance listed above in Section 3.A. of this RFQ/RFP Qualification submittal

_____ (Name of Prospective Firm)
and that this Declaration was executed in _____, in the State of _____,
_____ (Name of City if within a City, otherwise Name of County) _____ (State)
on _____ (Date)

(Signature)

(Name & Title)

(Insurer Name)

(Street Address)

(City, State & Zip Code)

(Telephone Number)

(Facsimile Number)

(Mobile Number)

(Email)

3. Declaration

I, _____, hereby declare that I am the
(Printed Name)
_____ of _____
(Title) (Name of Company)

submitting this Qualification Submittal; that I am duly authorized to sign this Qualification Submittal on behalf of the above named company; and that all information set forth in this Qualification Submittal and all attachments hereto are, to the best of my knowledge, true, accurate, and complete as of its submission date.

I declare, under penalty of perjury, that the foregoing is true and correct and that this Declaration was executed in:

_____, in the State of _____,
(Name of City if within a City, otherwise Name of County) (State)

on _____ .
(Date)

(Signature)