

**University of California,
Santa Barbara**



Request
for
Qualifications

**UCSB CAMPUS
SUSTAINABILITY
PLAN**

Project Number:
988047

Office of Design &
Construction Services
And
Physical Facilities

March 2005

**University of California, Santa Barbara
CAMPUS SUSTAINABILITY PLAN**

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ATTACHMENTS

Statement of Qualifications Form	(See Separate PDF File)
Sample Professional Service Agreement	(See Separate PDF File)
Campus Master Plan Physical & Environmental	http://bap.ucsb.edu/planning/
Campus Indicators	(See Separate PDF File)
Green Building Policy from Chancellor Yang	(See Separate PDF File)



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Project Description

The University of California, Santa Barbara, (UCSB) hereby solicits qualifications from consultants interested in providing services for the Campus Sustainability Plan. The planned date for completion is November 2005.

Scope of Services

The Campus Sustainability Plan will provide UCSB with the ability to identify the essential elements and goals for campus sustainability. The plan will provide analysis on current campus conditions, guidelines, policies and procedures, and will develop future targets and goals for the operations of campus activities. The plan should include measurable indicators and planning principles for all key areas of the campus, including, but not limited to: the physical environment, built environment, purchasing, parking and transportation. In addition, the plan needs to incorporate both the academic and physical planning goals of the campus over the next 15 years and should provide sustainability principles to help guide decision making related to the update of the UCSB Long Range Development Plan.

Funding of the above project is contingent upon receipt of funding from a variety of sources. While it is anticipated that funding will be obtained, there is no assurance that funds will be received for the project noted. Selection of the design professional will follow standard University procedures.

Instructions for Application

Consultant teams with qualifications that include experience in the design of projects similar in scale and scope are encouraged to respond. A copy of the Statement of Qualifications (SOQ) form to be submitted with all Qualification packets will be available March 16, 2005 on our home page: <http://facilities.ucsb.edu/contracts/requests/> or call Linda Playman at (805) 893-2910. Seven (7) sets of the Qualifications must be returned to:

Perrin Pellegrin, Sustainability Coordinator, Office of Design and Construction, University of California, Santa Barbara, CA 93106-1030 no later than 4:00 PM, April 4, 2005.

Affirmative Action Statement

Each candidate firm will be required to show evidence of its equal employment opportunity policy. Every effort will be made to ensure that all persons, regardless of race, religion, sex, color, ethnicity and national origin have equal access to contracts and other business opportunities with the University.



Background

This Request for Qualification provides some background on the campus' sustainable practices and polices and explores the scope of work desired.

UCSB has a long-standing track record of environmentally sound practices. The campus curriculum includes Bachelor of Science and Bachelor of Arts degree programs in Environmental Studies and Masters and Doctoral degree programs in the Donald Bren School of Environmental Science and Management. Over the past several decades, the campus aggressively engaged in energy and water conservation programs and has actively recycled waste products associated with administrative operations, construction activities and food service production. More recently, the campus successfully delivered the first LEED™ Platinum Certified laboratory building in the country.

UCSB has also implemented sustainable practices into the built environment. In July of 2003, the University of California Regents approved The Green Building Policy and Clean Energy Standard, which effectively laid the groundwork for the development and implementation of sustainability planning for the University of California system. Following The Regents' action with regards to green building, UCSB Chancellor Yang established that the UCSB campus shall "as a matter of practice take the necessary steps to implement The Regents Green Building Policy and strive to achieve the LEED™ Silver certification for new buildings approved after July 1, 2004." In order to ensure that his mandate is followed, Chancellor Yang created a Sustainability Committee.

These practices help to safeguard the unique campus environment. The UCSB campus occupies 1,009 acres adjacent to the Pacific Ocean and consists of a balance between developed and undeveloped land. The majority of the campus, 68%, is open space, while the remainder is comprised of athletics and recreation facilities, housing, campus buildings, parking and transportation corridors.

The UCSB campus is presently engaged in the planning steps leading to a new Long Range Development Plan (LRDP). The current LRDP, authored in 1990, expires at the conclusion of the 2005-06 academic year. The LRDP is a guiding document which provides a conceptual blueprint for the development of the campus' built environment over a time period of fifteen to twenty years. The LRDP takes into account a number of associated planning documents, including: the Academic Plan, the Campus Plan, the Campus Housing Plan and the campus Infrastructure Assessment. It is the campus' intent to further inform the new LRDP process with the inclusion of the Campus Sustainability Plan.



Scope of Work

The University of California, Santa Barbara, (UCSB) requests a proposal to provide a Campus Sustainability Plan. The plan's purpose is to identify the essential elements of campus sustainability, and provide analysis and guidelines for the operation of campus activities. The plan should include measurable indicators and planning principles for all key areas of the campus, including, but not limited to: the physical environment, built environment, purchasing, parking and transportation. In addition, the plan needs to incorporate both academic and physical planning goals of the campus over the next 15 years and should provide sustainability principles necessary to help guide decision making related to the update of the UCSB Long Range Development Plan.

UCSB requires that the consultant provide the campus with the necessary services to help create a sustainability plan. The Campus Sustainability Plan shall be a specific and comprehensive document. The plan should identify and address key elements of sustainability including, but not limited to:

- Built environment
- Physical environment
- Purchasing and procurement
- Recycling
- Resource management and consumption
- Traffic and transportation

The Campus Sustainability Plan shall include measurable indicators and planning principles for all key areas of the campus. The plan shall include tools to measure the impacts of proposed practices and shall provide critical evaluation methods for further development of such practices. The plan should provide adequate analysis to guide campus decisions surrounding the priority and timing of specific sustainability initiatives.



University Duties

The University will be responsible for providing base maps, existing information about utility capacities and location, water use, available traffic counts, and the latest transportation and parking counts for the campus. UCSB staff will also be responsible for arranging and hosting internal review meetings and other meetings related to the review of the documents.

Campus Contact

Perrin Pellegrin will be the contact staff assigned to the project and will be available to answer questions.

Campus Services

The Campus will be responsible for providing the selected consultant team with information about the project area boundaries and providing base maps and existing studies. The University will furnish a current topographic survey (1 inch to 20 feet and 1 inch to 40 feet).

The University will also arrange for internal review meetings and provide temporary on-campus workspace for the consultant if required.



Project Schedule

Advertise RFQ	March 16, 2005
RFQ Available	March 16, 2005
SOQ's Due at UCSB	April 4, 2005
Evaluation of SOQ's	April 4 – 7, 2005
Reference Checks, Interview & Develop Short List	April 8 – 15, 2005
<i>The anticipated proposal schedule is tentative. The exact dates will be set forth in an "Announcement to Prequalified Proposers".</i>	
Letter to Selected Consultants & Issue RFP	April 18 –22, 2005
Short List Firms Visit Campus (tentative)	Late April 2005
Consultant Interviews (tentative)	May 2005
Select Consultant and begin Fee Negotiations	May 9-20, 2005
Contract Award	Late May 2005
Sustainability Workshops	Early June 2005
Develop Preliminary Sustainability Plan with Campus	July 2005
Develop Sustainability Plan	August 2005
Present Completed Sustainability Plan	November 2005



QUALIFICATION FORMAT

Submit qualifications in a wire bound 8.5"x11" format with project and firm identification on cover stock.

The qualification submitted must address the following major topics in the following order:

Approach. A general statement of the firm's approach with particular focus on distinguishing characteristics or services.

Work Proposed to be Performed. A discussion of the consultant's general understanding of the scope of services to be provided and the major work tasks to be performed.

Project Schedule. Include a Gantt or other graphic chart schedule indicating the anticipated duration and start and completion dates for tasks, keyed to the scope of work, and integrating critical elements of the campus approval process. The schedule should also show consultant payments by percentage of total.

Key Personnel. The proposal must include information about the firm's personnel, stating their proposed role in this project, education, title, related qualifications, past relevant experience and the date in which that person joined the firm. The qualification package shall specifically identify the personnel assigned. Submit a statement of qualifications, demonstrating experience and previous projects successfully completed.

Writing Sample. Please include a minimum of one sample document prepared by or under the guidance the proposed project manager. This sample should be illustrative of the project manager's writing skills as well as management capabilities.

Relevant Experience. A statement of the firm's past appropriate experience, including a brief description of the project, the client's name, address and telephone number. Also provide a description of the consultant's exact responsibilities on the project, and clarify whether this project is an example of the firm's experience or an individual's experience.

References. The University requests the inclusion of three professional references in the proposal. This information should include the person's name, title, address and telephone number.

Additional Information. The consultant may include any other information in the proposal that will assist the University in the selection process.

Professional Service Agreement. Note any exceptions to the enclosed Agreement that would prevent your firm from executing the Agreement. We cannot accept any request to include language to limit liability with regards to insurance and/or modify the indemnification clauses. Proposal submittals shall include a separate letter affirming the intent of the proposer's acceptance of terms and conditions contained in the Agreement (see separate PDF file).

Certificate of Insurance. Note any exception to the Certificate requirements and provisions that would prevent your firm from executing an Agreement. Qualification submittals shall include a separate letter affirming the intent of the proposer's acceptance of terms and conditions contained in the Certificate of Insurance (see separate PDF file).

UCSB Statement of Qualifications Form. Attach the University of California, Santa Barbara standard form for Statement of Qualifications, which is required to be filled out and included in your proposal.



Instructions to Applicants

1. Respond concisely to the Qualification Format, Selection Criteria and complete the Statement of Qualifications Form. A list of projects of similar scope, complexity, and cost will be essential to a successful application. The Statement of Qualifications must be signed by a responsible member of the firm applying for the project.
2. Include supplementary information supporting qualifications (8 ½ x 11 format). Organization and brevity will be appreciated. Work submitted as an example of the design team's qualifications will be considered only to the extent it is similar to the proposed project. Additional information may be submitted demonstrating experience in programming, planning and design on university campuses. Identify the team and consultants for all projects listed as examples of your firm's work. Provide information on proposed staff and consultants for this project and an organization chart. Provide a list of previous projects the proposed team has participated in together.
3. Return to:
Perrin Pellegrin
Sustainability Coordinator
Office of Design & Construction Services
Facilities Management Building 439
University of California, Santa Barbara
Santa Barbara, CA 93106-1030
4. Submit seven (7) copies of all material bound into a single document.
5. Due Date: April 4, 2005, no later than 4:00 p.m.

The University reserves the right to reject late proposals. Extensions requested in advance of the deadline will not be considered.

The University reserves the right to reject any and all submittals, as well as the right to waive informalities. The University also reserves the right to issue written notice to all participating firms of any change in the qualification submission schedule should the University determine, in its sole discretion, that changes are necessary. The University's receipt of any qualification submitted pursuant to this Request for Qualification shall not constitute any implied intent to enter into a contract for consultant services.

6. Design teams with qualifications considered appropriate by the Screening Committee will be asked to submit detailed proposals for consideration by the Selection Committee.



Selection

The selection process will consist of an evaluation of submittals, site visits, and a one-hour interview at the Campus. A sub-committee of the Sustainability Committee will craft a shortlist of consultants for the interview. Selected consultants will be separately notified of site visits and the date, time, and place of their interview. Selection of the consultant will be based on a number criteria:

- Qualifications, capabilities, and resources of the consultant.
- Appropriateness of the approach.
- Scope of work proposed to be performed.
- Quality of plans and reports.
- Interview.
- Affirmative action and equal opportunity.

A committee including, faculty, staff, and students will select the consultant.

Fees will be determined in the selection process.

Selection Criteria

1. ***Design ability.*** Ability as it can be evaluated by examination of the functional, technical, economic, and aesthetic qualities of projects done for the University or other clients.
2. ***Research potential.*** Capability to undertake appropriate research to resolve design problems specific to the needs of the program or project under consideration.
3. ***Program responsiveness.*** Previous experience that demonstrates success in completing projects consistent with program schedule, budget, and technical requirements, and that indicates the ability to complete the proposed project in a manner that is responsive to the specifics of the program.
4. ***Evaluation of consultants proposed to be employed.*** Previous experience with special requirements appropriate to the project under consideration with evidence or expression that appropriate design and/or consulting advice can be obtained as required.

5. ***Production capability.*** Evidence of ability to perform all phases of the work, to produce documents of superior quality and to meet the completion schedule for each phase.
6. ***Coordination and supervision.*** Evidence of ability to provide experienced staff and timely support during the project.
7. ***Proximity.*** To the project location, willingness to establish a local office or an association with a local consulting firm.
8. ***Client relationships.*** Recognition of the consultative processes associated with work on a University Campus.
9. ***Equal Opportunity.*** The commitment of the University to equal opportunity applies to the selection of design professionals.



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 themselves:

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 by the Office of Design & Construction, Facilities Management, University of California at Santa Barbara in consideration of commissions to Design Professionals.

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

The official responsible for maintaining the information contained on this form:

Contracting Services
Office of Design & Construction Services and
Physical Facilities
University of California, Santa Barbara
Building 439
Santa Barbara, California 93106-1030