

ADDENDUM NO. B

April 8, 2019

PRE-BID DOCUMENTS

FOR

**BATCHLOR HALL REWEVAL
PROJECT NO. 950464
CONTRACT NO. 950464-CMAR-2019-84**



The following changes, additions, or deletions shall be made to the following documents as indicated for this Project; and all other terms and conditions shall remain the same.

1. **BEST VALUE QUESTIONNAIRE**

Replace the Best Value Questionnaire with the one issued in this Addendum.

2. **BEST VALUE EVALUATION**

Replace the Level 2 Scoring: Best Value Evaluation.

END OF ADDENDUM

BEST VALUE EVALUATION QUESTIONNAIRE

Total Points Available – 1000

INSTRUCTIONS

Bidders shall submit responses to this Best Value Questionnaire by responding to the following questions and shall attach all required documents and information as indicated below.

Provide six (6) sets of this document in binders organized with tabs per each section and subsections and PDF format file with bookmarks for each section and subsection). For Safety Program under Item #5, submit one (1) hard copy ONLY. Type size shall be no smaller than 11 point, except within exhibits/graphics. Also, refer to submission requirements in the Instructions to Bidders, Article 5.3 (Submission of Bids).

If, prior to bid opening, a CM Contractor does not earn a minimum of 650/1000 quality points, then this shall result in a determination by the University that such CM Contractor is non-responsive based on quality of Best Value submittals and its Bid shall be rejected by the University. Thereafter, to determine the Best Value Contractor, the University shall divide each remaining qualified Bidders' price by its respective qualifications scores. The lowest resulting cost per quality point will represent the Best Value Bid.

**1. FINANCIAL CONDITION
Total Possible Points - 150**

Provide the following information regarding your financial condition.

Current assets	\$ _____
Current liabilities	\$ _____
Total Revenue	\$ _____
Net Income	\$ _____
Total Debt	\$ _____
Total Assets	\$ _____
Total net worth	\$ _____

To verify the foregoing information, each Bidder shall also submit a copy of its latest financial statements as well as that of its most recently audited financial statements either reviewed or audited in accordance with Generally Accepted Accounting Principles. **NOTE: Only a financial statement that is reviewed or audited will be acceptable. Failure to submit a financial statement that is reviewed or audited will deem the CM Contractor's submittal as non-responsive.**

Note: The Confidentiality of private financial information will be protected to the extent allowed by law. The financial statements required above may be placed in a separate sealed envelope marked confidential and addressed to **Betty Osuna, UCR Contracts Administration**. If you wish to have this document returned to you, please indicate as much.

2. **RELEVANT EXPERIENCE**

Total Possible Points: 150

Provide detailed information on **two (2) projects of similar scale, scope and complexity** to the **Batchelor Hall Renewal** Project described in this document. Each project must have:

- A minimum of **\$10M** in construction cost at the time of its completion
- ***Completed*** by your firm **within the last 10 years**.
- Phased construction in order to facilitate continued user occupancy

The projects submitted will be scored based on the similarities to the proposed **Batchelor Hall Renewal** project, which will implement a phased installation of the following components whilst the building remaining occupied.

Replacement of the:

- building (laboratory) exhaust fan units and main distribution
- building air handling units, chilled water pumps and main distribution
- building plumbing mains and water treatment system

Upgrade of the:

- building fire suppression mains and fire life safety system
- building elevator system
- building electrical feeder and main distribution
- accessible restrooms
- laboratory equipment room
- common areas spaces (limited)

A. **Bidder shall provide the following information for each project** (all documents shall be double-sided, and each side shall count as one page):

i. **General project Information:**

Submitted project information shall be no more than one page per project.

- a. Project name:
- b. Location:
- c. Name of Owner and current contact information:
- d. Contract completion date:
- e. Actual completion date:
- f. Total construction duration in calendar days:
- g. Project delivery method:
- h. GSF:
- i. Construction cost - contract amount:
- j. Construction cost - final amount:
- k. Change order rate - % (if over 5%, provide explanation):
- l. Project Management personnel (including Project Executive, Project Manager,

Preconstruction Manager and Project Superintendent):

ii. Type and scope of project:

The Batchelor Hall project is anticipated to consist of four - five distinct schedule phases. The phases will be planned by the contractor as such to allow the users/equipment within the affected areas of the building to be temporarily vacated by the University in order to facilitate construction. In some cases the contractor will need to coordinate work as such to allow some users remaining active in place during construction.

The scope of the project is listed below (reference included plans for detailed project scope):

Replacement of the:

- building (laboratory) exhaust fan units and main distribution
- building air handling units, chilled water pumps and main distribution
- building plumbing mains and water treatment system

Upgrade of the:

- building fire suppression mains and fire life safety system
- building elevator system
- building electrical feeder and main distribution
- accessible restrooms
- laboratory equipment room
- common areas spaces (limited)

iii. Description of project similarities:

Compare similarities in construction with proposed UCR's **BATCHELOR HALL RENEWAL**.

iv. Specific challenges:

Describe the pre-construction planning process that was used to determine how occupied areas of the building would remain in operation including staging and logistics for temporary utilities, facilities, and access.

Describe any specific challenges that had to be overcome during the design and construction process and how they were resolved. Based on those challenges, describe how your approach to managing design and construction-related activities will differ for UCR's **BATCHELOR HALL RENEWAL**.

v. Management Responsibilities:

Describe the firm's role in managing the CM at Risk subcontractors and the process used to coordinate between the Architect, Contractor and the subcontractors, and how the implementation affected the production, cost, quality, and schedule of the project.

vi. Building System Complexities

Describe the complexity of the building systems similar to the proposed **BATCHELOR HALL RENEWAL**, e.g., MEP systems and lab support infrastructure. If your firm considers the building systems complex, describe the systems.

vii. Standardization and Modularity:

Describe the firm's role in managing the construction supply chain in order to reduce project lead time through the standardization of products and/or modularization of products and components. More specifically, explain how the CM at Risk team eliminated unwanted variations while maximizing value.

viii. Off-site fabrication:

Describe whether or not the firm implemented off-site fabrication on relevant projects. Explain the decision making system implemented to proceed with off-site fabrication or its alternative(s). Include the lessons learned from proceeding with the decision.

Project narrative shall be submitted in the form of attachments to this document. Presented information shall follow the same outline format as this document using no more than ten (10) standard pages per project, minimum font size: 12. Photos, diagrams, sketches, and organizational charts, total of 15 pages.

B. Projects will be scored on how closely they meet the following criteria:

- i. Project(s) that fully meet the criteria delineated in Item 2 (Relevant Experience) will be scored favorably.
- ii. Complexity of the work with an emphasis on MEP Infrastructure Renewal ~~Teaching/Research laboratory~~ will be scored favorably.
- iii. Projects that have included the successful development of CM at Risk packages, management of CM at Risk subcontractors, and coordination with the Design Professional and the University's Separate Consultants will be evaluated and scored favorably.
- iv. Projects with management personnel and the core team proposed under Item 3 (Management Competency) section will be evaluated favorably.
- v. Projects that were completed at University of California, Riverside with proposed personnel under Item 3 will be scored favorably.
- vi. Projects that were successfully completed under critical constraints (e.g., urban setting, accelerated schedule, multiple stakeholders, etc.) will be scored favorably.
- vii. Projects that were successfully completed while facing specific challenges that were overcome due to the experience and expertise of project management and implementation of techniques to increase collaboration and address issues will be scored favorably.

3. MANAGEMENT COMPETENCY

Total Possible Points: 400

A. Management and Staffing Plan

Submit a "Management and Staffing Plan" that clearly shows on-the-job time commitments during the pre-construction and construction periods and for the period from substantial completion to final acceptance. The Management and Staffing Plan shall include all information requested below in

Items 3.B through 3.J. Staffing plans must meet the minimum requirements outlined in The Scope of Work. Staffing plans which include additional on-the-job commitments and positions in excess of the minimum requirements should be clearly outlined. **Staffing plans that do not meet the minimum requirements will deem the CM Contractor's submittal as non-responsive.**

B. Project Team Organization

i. Provide an organizational chart:

The chart should identify by name and title all of the proposed key personnel of each team component. Bidders proposing multiple members of the management personnel that have previous experience working at UCR and with each other on relevant projects submitted in Section 2 above will score favorably.

ii. Resumes:

Submit resumes demonstrating qualifications, training, and experience for the key personnel who will be assigned to this project.

a. **Project Executive**

- Provide specific information regarding experience with supporting the utilization of the CM at Risk delivery required in the UCR Agreement.
- Prior work experience at UCR preferred.

b. **Project Manager**

- Provide specific information regarding experience with managing projects that utilized the CM at Risk delivery required in the UCR Agreement.
- Provide information on experience in the Development of Built In Quality Programs and Plans.
- Prior work experience at UCR preferred.

c. **Pre-Construction Manager**

- Provide specific information regarding experience with managing projects that utilized CM at Risk delivery required in the UCR Agreement.
- Include experience in support of the assembly of bid packages within the project budget.
- Provide information on experience in the Development of Built In Quality Programs and Plans
- Provide information on experience in the Development of multi-phased project schedule for bidding and execution.

d. **Estimator**

- Provide specific information regarding experience with managing projects that utilized the CM at Risk delivery required in the UCR Agreement, and to support the assembly of cost estimates within the project budget.

e. **Project Scheduler**

- Provide specific information regarding experience with projects that utilized the CM at Risk delivery required in the UCR Agreement and the use of systems to develop and track the project schedule. Provide – if any – information regarding experience with schedule optimization and complex phasing in occupied building.

f. MEP/BIM Coordinator

- Provide specific information regarding experience with managing projects that utilized the CM at Risk delivery required in the UCR Agreement, supporting the analysis and coordination of the appropriate building systems. Also, information about experience with collaborating with manufacturers to manage off-site fabrication will be scored favorably.
- Provide specific information regarding experience structuring Project Information Systems and managing projects that utilized BIM for design and engineering, clash detection, analysis of construction phasing and coordination, integration of cost modeling and use of outside tools such as Virtual Design and Construction (VDC), Total Station Layout, BIM 360 or other software, Laser Scanning, etc.

g. Construction Field Superintendents

- Provide specific information regarding experience managing projects that utilized the CM at Risk delivery required in the UCR Agreement, and, in particular, use of visual management tools to track progress and coordinate work. Provide information regarding experience with use of outside tools such as Virtual Design and Construction (VDC), Total Station Layout, BIM 360 or other software, Laser Scanning, or other technological tools to help plan and manage work in the field. Provide information on experience with phasing of complex work in an occupied building.

h. Project Engineer(s)

- Provide specific information regarding experience with managing projects that utilized the CM at Risk delivery required in the UCR Agreement, and, in particular, systems to develop and track the project schedule. Information about how the Project Engineers tracked progress, and visually communicated it to the team on a weekly basis will be scored favorably.

i. Safety Coordinator

- Provide specific information regarding experience with projects that utilized the CM at Risk delivery to assist in the early identification of potential hazards and mitigation of safety incidents. The Safety coordinator should hold a certification issued by the Board of Certified Safety Professionals (CSP, OHST, CHST or STSC) and be responsible for application of sophisticated and proactive training plans while maintaining a safety program based on proactive management principles.

C. Questions for the Project Team proposed in response to Item 3.B.ii

Projects references submitted below, where members of the management personnel that have previous experience working at UCR and with each other as well as being consistent with the relevant projects submitted in Section 2 above, will score favorably

- a. Have you personally completed two or more projects where Pull Planning was the primary process used for creating and updating the project schedule?
- Yes No

If yes, provide the project name, owner, and construction cost:

Project _____

Owner _____
 Construction Cost _____
 Project Duration _____
 Exceeded Schedule Requirements Yes No

Project _____
 Owner _____
 Construction Cost _____
 Project Duration _____
 Exceeded Schedule Requirements Yes No

- b. Have you personally completed one or more MEP infrastructure replacement for a laboratory or research facility?
 Yes No

If yes, provide the project name, owner, and construction cost:

Project _____
 Owner _____
 Construction Cost _____
 Project Duration _____
 Exceeded Schedule Requirements Yes No

- c. Have you personally completed a project which incorporated multiple phases which included coordination with the owner to facilitate successive relocation and backfill of occupants?
 Yes No

If yes, provide the project name, owner, and construction cost:

Project _____
 Owner _____
 Construction Cost _____
 Project Duration _____
 Exceeded Schedule Requirements Yes No

- d. Have you personally completed a Teaching/Research laboratory project at a University of California Campus
 Yes No

If yes, provide the project name, owner, and construction cost:

Project _____
 Owner _____
 Construction Cost _____
 Project Duration _____
 Exceeded Schedule Requirements Yes No

D. Relationship with UCR

Describe how your team will fulfil this relationship with UCR, and your commitment to a successful partnership and project delivery:

- i. Describe how your team will work with the University’s project team.
- ii. Describe how your team will work with University stakeholders.

E. Relationship with the University’s Design Professionals and other Partners

Describe how you will collaborate with the Design Team and other partners, such as the University’s elevator contractor and furniture provider, to ensure the successful project delivery:

- i. Describe your roles, responsibilities and relationship with the Design Team and other business partners and vendors during Phase 1 (pre-construction).
- ii. Describe your roles, responsibilities and relationship with the Design Team and other business partners and vendors during Phase 2 (construction).

F. Managing Design and Preconstruction Services:

- i. Provide a short narrative that describes how you will manage Design and Preconstruction Services, with the application of the Plan, Do, Check, Adjust (PDCA) Cycle. Summarize your use of the “Plan” portion of the cycle during the Design and Preconstruction phase and how that planning and lessons evolve in to learning pathways which shape the “Do, Check and Adjust” aspect of the cycle.
- ii. Describe how you will incorporate the use of set based design combined with 4-D and 5-D analysis to allow for better decision making and more efficient constructability reviews.
- iii. Outline how you will address the need to collocate with the project team in the interim period before the Big Room is constructed.
- iv. Provide a preliminary site logistics plan outlining initial thoughts on use of the site for such items as site deliveries, laydown space, hoisting, parking, coordination with other projects in the area, etc.
- v. Provide a preliminary summary of what you feel the main challenges and risks are with project and initial thoughts on how to mitigate those risks.

G. Target Value Design/Set Based Design

- i. Outline your approach to support decision making on this project, and what decision documents will be utilized to analyze design and construction options.
- ii. Provide a summary of your approach to creating and implementing a Target Value Design and Construction Framework based on the information within bidding documents.
- iii. Provide a summary and associated tools you plan to utilize to understand the total cost of ownership and life cycle costs, and how they will be applied to the project.

H. Managing Contract Schedule

- i. Describe how your firm will develop the baseline schedule for this project and keep it updated. Based on the PDCA Cycle, outline how the planning in the Design and Pre-Construction Phase of the contract will utilize tools to inform in the development of the schedule and how those planning efforts will feed into the execution of a final construction schedule for the “Do Check and an Adjust” portion of the cycle.
- ii. Provide a Preliminary contract schedule outlining timeframes for inclusion of proposed

trade partners in order to accelerate participation of a complete team as soon as possible. Include proposed timelines for phasing of Deferred Approvals Packages, and organization of trade subcontractor's scope into Bid Packages to accelerate construction timeframes.

- iii. Describe how you will implement an overall program to include scheduling processes and other related weekly work plan tools to track Percent Complete in the Design and Construction phases. Describe your firm's mitigation measures when there are potential issues with schedule as well as lack of participation and/or false information.

I. Managing and Coordination with Trade Partners

- i. Provide a short narrative that describes how you will manage trade partners in a phased design and construction process to facilitate applications of lessons learned to improvements in project design and construction processes.
- ii. Provide a draft of Subcontractors and trade partners Bid Packages for immediate execution post-award. Include draft Best Value Questionnaires for each Bid Package. Discuss why these recommendations are important to the successful execution of this project and the factors which define the minimum amount of time required to execute these packages. (Best Value Questionnaire Sample http://www.ucop.edu/construction-services/files/facman/contracts/BV.1_Questionnaire.docx)(?)
- iii. Outline how you intend to organize Deferred Approvals Packages, and organize trade subcontractor's scope into Bid Packages to increase efficiency, support collaboration and leverage the experience of specific trade subcontractors.
- iv. Describe how you intend to structure the Pre Construction and Construction Phase of the contract utilizing tools in the contract to coordinate Trade Partners and identify conflicts during the Planning portion of the PDCA cycle.
- v. Summarize how you will leverage integration of the Contractors in the Pre-Construction phase will lead to opportunities for advanced production management and the efficiencies that would result from processes such as offsite fabrication, modularity, etc. in the Construction phase.(?)

J. INTERVIEW & ORAL PRESENTATION

- i. See Level 2 Interview Requirements and Supplemental Oral Presentation Questions for formatting.
- ii. Interview and Oral Presentation will be graded together.

K. Management Competency Evaluation:

The Management and Staffing Plan will be reviewed and scored based on the following criteria and any noted items specified above.

- a. The firm's understanding, readiness and commitment to properly manage the **BACHELOR HALL RENEWAL** project in accordance with the requirements of the Contract.
- b. The firm's demonstrated experience and readiness in managing preconstruction and design services, subcontractors, contract schedules, construction costs and quality assurance programs to achieve Project Objectives.
- c. The firm's demonstrated experience and readiness in implementing tools in project delivery

in accordance with the requirements of the Contract.

- d. The strength, experience, and work history of the personnel that will be assigned to the team and time commitment to this project. Firms that propose management personnel with prior experience where members of the management personnel that have previous experience working at UCR and with each other, as well as being consistent with the relevant projects submitted in Section 2 above, will be scored favorably.

4. **LABOR COMPLIANCE**

Total Possible Points – 150

- A. Provide the **name, address and telephone number** of the apprenticeship program (approved by the California Apprenticeship Council) from whom Bidder intends to request the dispatch of apprentices to Bidder for use on the Project.

Name _____

Address _____

Telephone Number _____

If Bidder operates its own State-approved apprenticeship program, state the year in which each such apprenticeship program was approved, and attach evidence of the most recent California Apprenticeship Council approval(s) of Bidder's apprenticeship program(s).

- B. At any time during the last five (5) years, has Bidder been found to have violated any provision of California apprenticeship laws or regulations, or the laws pertaining to use of apprentices on public works?

Yes No

If yes, provide the date(s) of such findings, and attach copies of the Department's final decision(s).

- C. During the last five (5) years, was Bidder required to pay either back wages or penalties for Bidder's failure to comply with the State's prevailing wage laws?

Yes No.

If yes, identify the violation by providing the project name, date of the violation, name of the entity (or entities), a brief description of the nature of the violation, and a brief description of the status of the violation (pending, or if resolved, a brief description of the resolution).

5. SAFETY RECORD

Total Possible Points – 150

A. Does your firm have a written Injury and Illness Prevention Program (IIPP) that complies with California Code of Regulations, Title 8, Sections 1509 and 3203?
YES NO

B. Does your firm have a written safety program that meets CAL/OSHA requirements? Submit a copy of the safety program that will be applicable to this project.
YES NO

C. Will your firm have personnel permanently assigned and dedicated to safety on this project?
YES NO

If yes, state the names of all such personnel who will be assigned and individually list their specific duties. Please also attach resumes for such persons and include any certifications and safety related training received.

D. Have you had accidents, which resulted in a construction fatality, on any of your projects within the last five (5) years?
YES NO

If yes, provide additional information. _____

E. Has CAL OSHA cited and assessed penalties against your firm for any “serious”, “willful” or “repeat” violations of its safety or health regulations in the last five (5) years?
YES NO

If yes, provide additional information.

Note: If you have filed an appeal of a citation and the Occupational Safety and Health Appeals Board has not yet ruled on your appeal, you need not include information about it.

F. Attach EMR verification from State of California or from insurance company for each year listed below.
EMR Rating:
Current year: _____
Previous year: _____
Year prior to previous year: _____

Firms who do not provide all of the above information will be deemed non-responsive.

Evaluator Name & Title: _____ Date: _____

CMAR (CONTRACTOR)

(Name, Address, City, State Zip Code)

DO NOT RELEASE OUTSIDE UNIVERSITY

LEVEL 2 SCORING EVALUATION

CMAR CONTRACTOR MUST HAVE:	PASS	FAIL	COMMENTS:
Current and active "B" Contractor License	<input type="checkbox"/>	<input type="checkbox"/>	
Signed Declaration by the sole proprietor, general partner or corporate officer, or original notarized power of attorney or corporate resolution is attached	<input type="checkbox"/>	<input type="checkbox"/>	

1. FINANCIAL CONDITION – MAXIMUM POINTS 100

	<u>2018</u>	<u>2017</u>	<u>2016</u>	<u>Verified</u>
Current Assets:				<input type="checkbox"/>
Current Liabilities:				<input type="checkbox"/>
Total Revenue:				<input type="checkbox"/>
Net Income:				<input type="checkbox"/>
Total Debt:				<input type="checkbox"/>
Total Assets:				<input type="checkbox"/>
Total Net Worth:				<input type="checkbox"/>
Total Points:				

2. RELEVANT EXPERIENCE – INCLUDE 2 PROJECTS OF SIMILAR SCOPE, SCALE & COMPLEXITY - TOTAL POSSIBLE POINTS (150)

2. RELEVANT EXPERIENCE CRITERIA	Project No. 1	Project No.2	FINAL EVALUATION (Meets Criteria)	Point Range Available
Completed or substantially completed within the past 10 years	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO (2 Projects)	0-5 Points
Project was a minimum of \$10 million in construction cost	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO (2 Projects)	0-10 Points
Project meets the following criteria:	Replacement of: <input type="checkbox"/> Bldg Lab exhaust fans and main dist <input type="checkbox"/> Bldg air handling units, CW pumps and main distribution <input type="checkbox"/> Bldg plumbing mains and water treatment system Upgrade: <input type="checkbox"/> Bldg fire suppression mains & fire & life safety syst <input type="checkbox"/> Bldg elevator system <input type="checkbox"/> Bldg electrical feeder & main distribution <input type="checkbox"/> accessible restrooms <input type="checkbox"/> lab equipment rm <input type="checkbox"/> common areas spaces (limited) <input type="checkbox"/> YES <input type="checkbox"/> NO	Replacement of: <input type="checkbox"/> Bldg Lab exhaust fans and main dist <input type="checkbox"/> Bldg air handling units, CW pumps and main distribution <input type="checkbox"/> Bldg plumbing mains and water treatment system Upgrade: <input type="checkbox"/> Bldg fire suppression mains & fire & life safety syst <input type="checkbox"/> Bldg elevator system <input type="checkbox"/> Bldg electrical feeder & main distribution <input type="checkbox"/> accessible restrooms <input type="checkbox"/> lab equipment rm <input type="checkbox"/> common areas spaces (limited) <input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO (2 Projects)	0-30 Points
A. Bidder shall provide the following information for each project (all documents shall be double- sided, and each side shall count as one page):				
i. <u>General project Information:</u> Submitted project information shall be no more than one page per project. a. Project name: b. Location: c. Name of Owner and current contact information: d. Contract completion date: e. Actual completion date: f. Total construction duration in calendar days: g. Project delivery method: h. GSF: i. Construction cost - contract amount: j. Construction cost - final amount: k. Change order rate - % (if over 5%, provide explanation): l. Project Management personnel (including Project Executive, Project Manager, Preconstruction Manager and Project Superintendent):	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO (2 Projects)	0-10 Points
ii. <u>Type and scope of project:</u> <u>Replacement of the:</u> •building (laboratory) exhaust fan units and main distribution •building air handling units, chilled water pumps and main distribution •building plumbing mains and water treatment system <u>Upgrade of the:</u> •building fire suppression mains and fire life safety system •building elevator system •building electrical feeder and main distribution •accessible restrooms •laboratory equipment room •common areas spaces (limited)	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO (2 Projects)	0-15 Points

<p>iii. <u>Description of project similarities:</u> Compare similarities in construction with proposed BATCHELOR HALL RENEWAL project.</p>	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO (2 Projects)	<p>0-20 Points</p>
<p>iv. <u>Specific challenges:</u> Describe the pre-construction planning process that was used to determine how occupied areas of the building would remain in operation including staging and logistics for temporary utilities, facilities, and access.</p>	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO (2 Projects)	<p>0-20 Points</p>
<p>v. <u>Management Responsibilities:</u> Describe the firm's role in managing the CM at Risk subcontractors and the process used to coordinate between the Architect, Contractor and the subcontractors, and how the implementation affected the production, cost, quality, and schedule of the project.</p>	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO (2 Projects)	<p>0-10 Points</p>
<p>vi. <u>Building System Complexities:</u> Describe the complexity of the building systems similar to the proposed BATCHELOR HALL RENEWAL, e.g., MEP systems and lab support infrastructure. If your firm considers the building systems complex, describe the systems.</p>	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO (2 Projects)	<p>0-10 Points</p>
<p>vii. <u>Standardization and Modularity:</u> Describe the firm's role in managing the construction supply chain in order to reduce project lead time through the standardization of products and/or modularization of products and components. More specifically, explain how the CM at Risk team eliminated unwanted variations while maximizing value.</p>	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO (2 Projects)	<p>0-10 Points</p>
<p>viii. <u>Off-site fabrication:</u> Describe whether or not the firm implemented off-site fabrication on relevant projects. Explain the decision making system implemented to proceed with off-site fabrication or its alternative(s). Include the lessons learned from proceeding with the decision.</p>	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO (2 Projects)	<p>0-10 Points</p>
<p>Scoring Committee: B. Projects will be scored on how closely they meet the following criteria:</p>				
<p>i. Project(s) that fully meet the criteria delineated in Item 2 (Relevant Experience) will be scored favorably.</p> <p>ii. Complexity of the work with an emphasis on <u>MEP Infrastructure Renewal/ Teaching/Research laboratory</u> will be scored favorably.</p> <p>iii. Projects that have included the successful development of CM at Risk packages, management of CM at Risk subcontractors, and coordination with the Design Professional and the University's Separate Consultants will be evaluated and scored favorably.</p> <p>iv. Projects with management personnel and the core team proposed under Item 3 (Management Competency) section will be evaluated favorably.</p> <p>v. Projects that were completed at University of California, Riverside with proposed personnel under Item 3 will be scored favorably.</p> <p>vi. Projects that were successfully completed under critical constraints (e.g., urban setting, accelerated schedule, multiple stakeholders, etc.) will be scored favorably.</p> <p>vii. Projects that were successfully completed while facing specific challenges that were overcome due to the experience and expertise of project management and implementation of techniques to increase collaboration and address issues will be scored favorably.</p>				
<p>TOTAL PROJECT POINTS: (Total Possible Points – 150)</p>	<p>Total Score:</p>			

3. Management Competency -- Total Possible Points (400)	
	Points Range Available
<p>Management and Staffing Plan – plan that clearly shows on-the-job time commitments during the pre-construction and construction periods and for the period from substantial completion to final acceptance.</p>	0-<u>25</u> 50 Points
<p>Project Team Organization -</p> <p>The chart should identify by name and title all of the proposed key personnel of each team component. Bidders proposing multiple members of the management personnel that have previous experience working at UCR and with each other on relevant projects submitted in Section 2 above will score favorably.</p> <p>(Staffing plans that do not meet the minimum requirements will deem the CM Contractor’s submittal as non-responsive.)</p>	0-<u>25</u> 50 Points
<p>Managing Design and Preconstruction Services:</p> <ul style="list-style-type: none"> i. Provide a short narrative that describes how you will manage Design and Preconstruction Services, with the application of the Plan, Do, Check, Adjust (PDCA) Cycle. Summarize your use of the “Plan” portion of the cycle during the Design and Preconstruction phase and how that planning and lessons evolve in to learning pathways which shape the “Do, Check and Adjust” aspect of the cycle. ii. Describe how you will incorporate the use of set based design combined with 4-D and 5-D analysis to allow for better decision making and more efficient constructability reviews. iii. Outline how you will address the need to collocate with the project team in the interim period before the Big Room is constructed. iv. Provide a preliminary site logistics plan outlining initial thoughts on use of the site for such items as site deliveries, laydown space, hoisting, parking, coordination with other projects in the area, etc. v. Provide a preliminary summary of what you feel the main challenges and risks are with project and initial thoughts on how to mitigate those risks. 	0-30 Points
<p>Target Value Design/Set Based Design</p> <ul style="list-style-type: none"> i. Outline your approach to support decision making on this project, and what decision documents will be utilized to analyze design and construction options. ii. Provide a summary of your approach to creating and implementing a Target Value Design and Construction Framework based on the information within bidding documents. iii. Provide a summary and associated tools you plan to utilize to understand the total cost of ownership and life cycle costs, and how they will be applied to the project. 	0-40 Points
<p>Managing Contract Schedule</p> <ul style="list-style-type: none"> i. Describe how your firm will develop the baseline schedule for this project and keep it updated. Based on the PDCA Cycle, outline how the planning in the Design and Pre- Construction Phase of the contract will utilize tools to inform in the development of the schedule and how those planning efforts will feed into the execution of a final construction schedule for the “Do Check and an Adjust” portion of the cycle. ii. Provide a Preliminary contract schedule outlining timeframes for inclusion of proposed trade partners in order to accelerate participation of a complete team as soon as possible. Include proposed timelines for phasing of Deferred Approvals Packages, and organization of trade subcontractor’s scope into Bid Packages to accelerate construction timeframes. iii. Describe how you will implement an overall program to include scheduling processes and other related weekly work plan tools to track Percent Complete in the Design and Construction phases. Describe your firm’s mitigation measures when there are potential issues with schedule as well as lack of participation and/or false information. 	0-<u>40</u> 60-Points
<p>Managing and Coordination with Trade Partners</p> <ul style="list-style-type: none"> i. Provide a short narrative that describes how you will manage trade partners in a phased design and construction process to facilitate applications of lessons learned to improvements in project design and construction processes. ii. Provide a draft of Subcontractors and trade partners Bid Packages for immediate execution post-award. Include draft Best Value Questionnaires for each Bid Package. Discuss why these 	

recommendations are important to the successful execution of this project and the factors which define the minimum amount of time required to execute these packages. (Best Value Questionnaire Sample -http://www.ucop.edu/construction-services/_files/facman/contracts/BV.1_Questionnaire.docx)(?)

- iii. Outline how you intend to organize Deferred Approvals Packages, and organize trade subcontractor's scope into Bid Packages to increase efficiency, support collaboration and leverage the experience of specific trade subcontractors.
- iv. Describe how you intend to structure the Pre Construction and Construction Phase of the contract utilizing tools in the contract to coordinated Trade Partners and identify conflicts during the Planning portion of the PDCA cycle.
- v. Summarize how you will leverage integration of the Contractors in the Pre-Construction phase will lead to opportunities for advanced production management and the efficiencies that would result from processes such as offsite fabrication, modularity, etc. in the Construction phase.

0-50 Points

INTERVIEW & ORAL PRESENTATION:

i. CM Firm articulated their vision and approach in alignment with what the University's goals are. Appropriately identified new ideas that would benefit the project while maintaining schedules.

0-70 Points

Management Competency Evaluation:

The Management and Staffing Plan will be reviewed and scored based on the following criteria and any noted items specified above.

- i. The firm's understanding, readiness and commitment to properly manage the **BATCHELOR HALL RENEWAL** project in accordance with the requirements of the Contract.
- ii. The firm's demonstrated experience and readiness in managing preconstruction and design services, subcontractors, contract schedules, construction costs and quality assurance programs to achieve Project Objectives.
- iii. The firm's demonstrated experience and readiness in implementing tools in project delivery in accordance with the requirements of the Contract.
- iv. The strength, experience, and work history of the personnel that will be assigned to the team and time commitment to this project. Firms that propose management personnel with prior experience where members of the management personnel that have previous experience working at UCR and with each other, as well as being consistent with the relevant projects submitted in Section 2 above, will be scored favorably.

3. Management Competency Continued

CMAR (CONTRACTOR) KEY PERSONNEL EXPERIENCE - RESUMES

Key Personnel Title	Experience Points Max	Relevant Education 5 points	Project Management Training/Tools 3 points	Certificates/Licenses 2 points	Total Points	Percent of Total
PROJECT EXECUTIVE <ul style="list-style-type: none"> Provide specific information regarding experience with supporting the utilization of the CM at Risk delivery required in the UCR Agreement. Prior work experience at UCR preferred 	10	<input type="checkbox"/> BA/BS <input type="checkbox"/> Other <input type="checkbox"/> None				Passing Rate $\geq 60\%$
PROJECT MANAGER <ul style="list-style-type: none"> Provide specific information regarding experience with managing projects that utilized the CM at Risk delivery required in the UCR Agreement. Provide information on experience in the Development of Built in Quality Programs and Plans. Prior work experience at UCR preferred 	10	<input type="checkbox"/> BA/BS <input type="checkbox"/> Other <input type="checkbox"/> None				Passing Rate $\geq 60\%$
PRE-CONSTRUCTION MANAGER <ul style="list-style-type: none"> Provide specific information regarding experience with managing projects that utilized CM at Risk delivery required in the UCR Agreement. Include experience in support of the assembly of bid packages within the project budget. Provide information on experience in the Development of Built In Quality Programs and Plans <u>Provide information on experience in the Development of multi-phased project schedule for bidding and execution.</u> 	10	<input type="checkbox"/> BA/BS <input type="checkbox"/> Other <input type="checkbox"/> None				Passing Rate $\geq 60\%$
ESTIMATOR <ul style="list-style-type: none"> Provide specific information regarding experience with managing projects that utilized the CM at Risk delivery required in the UCR 	10	<input type="checkbox"/> BA/BS <input type="checkbox"/> Other <input type="checkbox"/> None				Passing Rate $\geq 60\%$

Agreement, and to support the assembly of cost estimates within the project budget.						
Key Personnel Title	Experience Points Max	Relevant Education 5 points		Project Management Training/Tools 3 points	Certificates/Licenses 2 points	Total Points Percent of Total
<p>PROJECT SCHEDULER</p> <ul style="list-style-type: none"> Provide specific information regarding experience with projects that utilized the CM at Risk delivery required in the UCR Agreement and the use of systems to develop and track the project schedule. Provide – if any – information regarding experience with schedule optimization <u>and complex phasing in occupied building.</u> 	10	<input type="checkbox"/> BA/BS <input type="checkbox"/> Other <input type="checkbox"/> None				Passing Rate ≥60%
<p>MEP/BIM COORDINATOR</p> <ul style="list-style-type: none"> Provide specific information regarding experience with managing projects that utilized the CM at Risk delivery required in the UCR Agreement, supporting the analysis and coordination of the appropriate building systems. Also, information about experience with collaborating with manufacturers to manage off- site fabrication will be scored favorably. Provide specific information regarding experience structuring Project Information Systems and managing projects that utilized BIM for design and engineering, clash detection, analysis of construction phasing and coordination, integration of cost modeling and use of outside tools such as Virtual Design and Construction (VDC), Total Station Layout, BIM 360 or other software, Laser Scanning, etc. 	10	<input type="checkbox"/> BA/BS <input type="checkbox"/> Other <input type="checkbox"/> None				Passing Rate ≥60%
<p>CONSTRUCTION FIELD SUPERINTENDENTS</p> <ul style="list-style-type: none"> Provide specific information regarding experience managing projects that utilized the CM at Risk delivery required in the UCR Agreement, and, in particular, use of visual management tools to track progress and coordinate work. Provide information regarding experience with use of outside tools such as Virtual Design and 	10	<input type="checkbox"/> BA/BS <input type="checkbox"/> Other <input type="checkbox"/> None				Passing Rate ≥60%

Key Personnel Title	Experience Points Max	Relevant Education 5 points	Project Management Training/Tools 3 points	Certificates/Licenses 2 points	Total Points	Percent of Total
<p>Construction (VDC), Total Station Layout, BIM 360 or other software, Laser Scanning, or other technological tools to help plan and manage work in the field.</p>						
<p>PROJECT ENGINEER(S)</p> <ul style="list-style-type: none"> Provide specific information regarding experience managing projects that utilized the CM at Risk delivery required in the UCR Agreement, and, in particular, <u>systems to develop and track the project schedule. Information about how the Project Engineers tracked progress, and visually communicated it to the team on a weekly basis will be scored favorably.</u> use of visual management tools to track progress and coordinate work. Provide information regarding experience with use of outside tools such as Virtual Design and Construction (VDC), Total Station Layout, BIM 360 or other software, Laser Scanning, or other technological tools to help plan and manage work in the field. 	10	<input type="checkbox"/> BA/BS <input type="checkbox"/> Other <input type="checkbox"/> None				Passing Rate ≥60%
<p>SAFETY COORDINATOR</p> <ul style="list-style-type: none"> Provide specific information regarding experience with projects that utilized the CM at Risk delivery to assist in the early identification of potential hazards and mitigation of safety incidents. The Safety coordinator should hold a certification issued by the Board of Certified Safety Professionals (CSP, OHST, CHST or STSC) and be responsible for application of sophisticated and proactive training plans while maintaining a safety program based on proactive management principles. 	10	<input type="checkbox"/> BA/BS <input type="checkbox"/> Other <input type="checkbox"/> None				Passing Rate ≥50%

PROJECT TEAM PROPOSED	Points Max		Points	TOTAL POINTS
<p>PROJECT TEAM PROPOSED</p> <ul style="list-style-type: none"> • References submitted where members of the management personnel that have previous experience working at UCR and with each other as well as being consistent with the relevant projects submitted. a. Have personally completed two or more projects where Pull Planning was the primary process used for creating and updating the project schedule. b. Personally completed one or more MEP infrastructure replacement for a laboratory or research facility. c. Personally completed a project which incorporated multiple phases which included coordination with the owner to facilitate successive relocation and backfill of occupants. d. Personally completed a Teaching/Research laboratory project at a University of California Campus. 	20	<p style="text-align: center;"><input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p style="text-align: center;"><input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p style="text-align: center;"><input type="checkbox"/> YES <input type="checkbox"/> NO</p>		
<p>RELATIONSHIP WITH UCR</p> <ul style="list-style-type: none"> • Describe how your team will work with the University's project team. • Describe how your team will work with University stakeholders. 	5	<p style="text-align: center;"><input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p style="text-align: center;"><input type="checkbox"/> YES <input type="checkbox"/> NO</p>		
<p>RELATIONSHIP WITH UCR DESIGN PROFESSIONALS/PARTNERS</p> <ul style="list-style-type: none"> • References submitted where members of the management personnel that have previous experience working at UCR and with each other as well as being consistent with the relevant projects submitted. 	5	<p style="text-align: center;"><input type="checkbox"/> YES <input type="checkbox"/> NO</p>		

<p>Deficiency Justification. Provide explanation if scores fall below the minimum passing rate.</p>					
<p>MANAGEMENT COMPETENCY (Total Possible Points – 400)</p>		<p>_____ Total Points</p>			

CMAR (Contractor):

Evaluator:

FINAL EVALUATION SCORING

CMAR CONTRACTOR MEETS ALL PASS/FAIL REQUIREMENTS:	<input type="checkbox"/> YES <input type="checkbox"/> NO
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CMAR BEST VALUE EVALUATION SCORES	
	Points:
Financial Condition (Total Possible Points - 100)	
Relevant Experience Points (Total Possible Points - 150)	
Management Competency (Total Possible Points - 400)	
Labor Compliance (Total Possible Points – 100)	
Safety Record (Total Possible Points – 100)	
Interview & Oral Presentation (Total Possible Points – 150)	
TOTAL POINTS: (Total Possible Points- 1,000)	

****Note: CMAR not meeting all the Pass/Fail criteria will not have their project references checked and thus may not be scored on project experience, personnel experience, or financial qualifications in the above table.**