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 on CD with bookmarks for each section and subsection (limited to 20 megabytes, total). For Safety Program under Item #6, 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), and paragraph 5.3.2.

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 for the previous two (2) fiscal years, in each case as either reviewed or audited in accordance with Generally Accepted Accounting Principles.  **NOTE: Only a financial statement that is reviewed or audited will be acceptable.**

   **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 **Steven Stugard, Capital Accounting**. If you wish to have this document returned to you, please indicate.
2. **RELEVANT EXPERIENCE**  
**Total Possible Points – 150**

A. Provide copies of documents listed below from a project recently completed or currently under construction and at least 50% completed, prepared by one or more members of your proposed project team. It is preferred that the project be the seismic renovation of an historic structure or an extensive building renovation (including new building systems), and that the project contains mixed uses including office, educational and/or residential space, in an urban environment where at least some of the work was performed under a design build structure. It is preferred that, to the extent possible based on the following inquiries, all documents refer to the same project. The project team members who generated the document must be identified. Bidder will not be deemed non-responsive if the information requested is not available for the identified project and bidder does not submit the requested information; however, the point score will be affected.

For each example project used in the below descriptions, provide a summary table of the following information (2 page maximum for each project; column format may be used):

1. **Project Identification**
   - Project Photos (1/4 page maximum)
   - Project Name, Address
   - Client Name, Address
   - Project Scope/Description (1/4 page maximum)
   - List (company name only) of Design/Build Subcontractors & Trade
   - List (company name only) of Bid Subcontractors & Trade
   - List of Self-performed Trades

2. **List Project Team Members, with Title/Role only (Project Executive, Project Manager(s), Superintendent, BIM Coordinator, Chief Estimator), and include a checkbox indicating whether they are being proposed for the CSB/UCH Program.**

3. **Identify the Lean Construction Methods Used (include the complete list in item 2.A.f.3 below, and include a checkbox to indicate each process/tool used)**

   **a. Experience in Continuous Cost Modeling (2 pages maximum)**

   1. Provide a narrative and evidence of Continuous Cost Modeling and estimation both during design and up to final execution of the work including any Target Value Design focused cost adjustments after bidding. Include a summary spreadsheet/table of incremental cost estimates provided at the end of the DD, CD and Construction phases.
   2. Demonstrate how project cost component targets were managed to keep within budget during the DD and CD Phases, and how these cost targets were achieved or bettered at completion of the project.
   3. Demonstrate how project cost risk was estimated and managed.

   **b. Experience in Continuous Budget Management (2 pages maximum)**

   1. Provide a narrative that explains the process used to manage the project budget (including frequency of monitoring and adjustment meetings). Include applicable detail for managing contingencies and General Conditions.
2. Demonstrate how budget targets were managed in the DD and CD Phases, and how these budget targets were achieved or bettered at completion of the project. Provide sample excerpts of budget management tools to illustrate your points.

c. Experience in Target Value Design Management (4 pages maximum)

1. Provide a narrative explaining how Target Value Design (TVD) by component system (cost estimate breakdown) was used during the Budget Management process. Explain how Value was measured and how it was incorporated into the decision-making process to ensure that both Target Cost and Target Value were achieved.

2. Demonstrate how TVD was used both during Design and Construction phases of the work, and how both during the Design and Construction phases of the work Target Value Design results were achieved or bettered at completion of the project.

3. Provide sample excerpts of status/monitoring tools used to measure TVD status at completion of DD, 50% CD, and 100% CD design phases. Compare the initial TVD goals with the results of the completed construction project.

4. Provide examples of how the TVD process was organized and used on other projects, and describe how your process has evolved over time.

d. Experience in Continuous Constructability Review Management (8 pages maximum)

1. Provide a narrative that explains your Continuous Constructability Review (CCR) process and how it was used during the Design and Construction phases of the project. Explain how the CCR process was included in the Target Value Design and Continuous Budget Management processes. Explain how CCR was used to improve Subcontractor productivity and ensure quality control. (2 page max)

2. Provide a spreadsheet/table that shows the frequency and number of items included in each review, a sample page of the tracking system used to monitor the disposition of each comment, and three document excerpts showing the format and content of example constructability comments. (3 pages max)

3. Provide a summary of major revisions to the project design that resulted from the CCR process, with a focus on revisions with a value of $50,000 or more, and when in the Design or Construction phase (use % complete of the phase) the revision was made. (2 page max)

4. Provide documentation of a sample review comment that resulted in the revision of multiple interrelated building systems, note the change in each system, and the net change in value of the integrated system. (1 page max)

e. Experience with Design Build Subcontractors (2 pages maximum, highlighting or with excerpts of sections from electronic contract provided in CD form in Appendix.)

1. Provide a copy of your risk management plan or risk transfer plan and/or coordination plan for a project or projects wherein you hired mechanical, electrical or plumbing design build subcontractors.

2. Provide documents reflecting how you assigned responsibilities between the Architect of Record and the design build subcontractors for errors and omissions and identifying the limits of each.

January 1, 2012
CM/Contractor: BVEQ
87833-0004/LEGAL27134133.7
3. Provide copy(ies) of design build subcontracts for mechanical, electrical and plumbing subcontractors. Provide full copies in electronic format (pdf compatible on a CD) as an attachment only in Appendix.

f. Experience with Lean Construction methods and processes (15 pages maximum)

1. Provide (2) copies of construction contracts containing Lean Construction methods and processes performed by you in the past five (5) years (confidential terms and conditions to be redacted). Provide full copies in electronic format (pdf compatible) only as an attachment in Appendix.

2. Provide a listing of all Lean project teams in which you have been a participant, the other team members with whom you have participated, and in what capacity(ies) for the past five (5) years.

3. Provide examples of your implementation of the following Lean construction methods and processes, as applicable:

   i)   Built in Quality;
   ii)  Eliminating waste while continually improving the project;
   iii) Set-Based Design;
   iv)  Target Value Design;
   v)   5S and Visual Management;
   vi)  Continuous Cost Modeling;
   vii) Pull Planning;
   viii) Information Center Meetings;
   ix)  Standardized Work;
   x)   Total Station Layout;
   xi)  Just in Time;
   xii) Last Planner™ System construction management;
   xiii) Takt-Time; and
   xiv) Building Information Modeling (BIM) and computer-aided design.

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

   i. Project(s) that fully meet the criteria delineated in paragraph A will be scored favorably.

   ii. MEP coordination work using Lean Construction procedures and BIM will be scored favorably.

   iii. Complexity of the Work, with emphasis on building systems and seismic renovation, will be scored favorably.

   iv. Projects that were completed at UCSF will be scored favorably.

   v. Projects required to comply with LEED New Construction Gold certification or demonstrate the application of sustainability principles to the systems, components and portions of the building being renovated will be scored favorably.

   vi. Projects that demonstrate a Lean Construction leadership role will be scored favorably.
vii. A single project that can demonstrate all attributes will be scored favorably.

3. **DEMONSTRATED MANAGEMENT COMPETENCY**

   **Total Possible Points – 400**

   A. It is preferred that the project be the seismic renovation of an historic structure or an extensive building renovation (including new building systems), and that the project contains mixed uses including office, educational and/or residential space, in an urban environment where at least some of the work was performed under a design build structure. It is preferred that all documents refer to the same example project documented in Section 2. The project team members who generated the document must be identified.

   In the following section, where narratives are requested, each shall be no more than a half page in length. Where samples are requested, provide copies of documents from the example project that is recently completed or currently under construction and at least 50% completed, prepared by one or more members of your proposed project team.

   Bidder will not be deemed non-responsive if the information requested is not available for the identified project and bidder does not submit the requested information; however, the point score will be affected.

   a. **Approach and Competency Managing Preconstruction Services (8 pages maximum)**

      1. Narrative describing your proposed Subcontractor Outreach Program for the CSB and UCH Seismic Renovation Program (“the CSB/UCH Program”). Specifically describe how it is distinct from a project-based program. Provide samples of Outreach program documents used for soliciting subcontractors, including a copy of the log demonstrating outreach by trade. Provide a list of subcontractors prequalified to bid on the sample project, bidders, and number of bids received for all major trades. (2 pages maximum)

      2. Narrative describing your proposed Risk Management Program for the CSB/UCH Program. Specifically describe how it is distinct from a project-based program, and how it will manage risk across multiple projects that share constituencies, communications protocols, support facilities, site access, utilities, etc. Provide samples of project-based risk assessment materials used at key progress milestones. Include relevant participation in risk assessment simulations. (2 pages maximum)

      3. Narrative describing your proposed use of 4-D Analysis for the CSB/UCH Program, including but not limited to site access and logistics, materials storage, temporary facilities, large or long lead items, etc. Provide samples/excerpts of documents correlating constructability and construction schedule. (2 pages maximum)

      4. Narrative describing your proposed collaboration process and shared facility (Big Room) approach for the CSB/UCH Program. Include proposed weekly meeting schedule and required technology. (2 pages maximum)
b. Approach and Competency in Managing Design Build Subcontractors (16 pages maximum)

1. Narrative describing your proposed program for selecting and managing the design build subcontractors for the CSB/UCH Program. Specifically describe how it is distinct from a project-based program, and any proposed CSB/UCH Program efficiencies. (2 pages maximum)

2. Standard MEP design build contract highlighting responsibilities between Contractor and Subcontractors. (2 pages maximum, highlighting or with excerpts of sections from contract included in Appendix.)

3. Schedules of Shop Drawings, Product Data, Samples and other submittals prepared by the applicable Design Build Subcontractor and used to track progress. (4 pages maximum)

4. Demonstrated results of coordination and collaboration processes between design build contractors, architect, engineers and owner. Include procedures or process that identified issues and outcomes of the process. (4 pages maximum)

5. A sample document tracking the clashes or conflicts found, tracked and resolved during design and Design Build MEP coordination using BIM or 3D clash detection. Relate this to the number of conflicts discovered and resolved during construction. (4 pages maximum, highlighting or with excerpts of sections from contract included in Appendix.)

c. Approach and Competency in managing Contract Schedule (14 pages maximum, 11x17 schedule format allowed)

1. Narrative and proposed CSB/UCH Program schedule outlining pre-construction activities, initiation of construction, and Substantial Completion for all 11 projects. Identify and explain proposed changes from the UCSF Project Schedule (Exhibit 21). Show how your firm will complete the CSB and UCH Seismic Renovation Program by May 1, 2019, with CSB completion occurring no later than May 1, 2017. Describe proposed schedule monitoring and risk management approach.

2. Sample 3- to 6-week look-ahead schedule from the midpoint of construction.

3. Sample final project schedule showing baseline and actual. Provide comparison of initial, midpoint and final project schedule showing and explaining changes.

4. Lean Construction-related reports, or similar, such as supply chain management, pull schedule reports, daily or weekly production plans, and Last Planner™ reports.

5. Documents tracking the progress of the production plans such as plan percent complete reports during design phase and construction phase.
d. Approach and Competency in Construction Budget Management (8 pages maximum)

1. Narrative describing proposed approach to CSB/UCH Program budget management. Identify program-related opportunities and efficiencies.
2. Sample RFI log from start of project through final completion, including at a minimum, dates and description of RFI’s. Describe process used to resolve RFI’s. Provide a graph or statistics indicating length of time to RFI resolution.
3. Sample Change Order Log from start of project through final completion including at a minimum, date, description and cost of change orders. Identify change orders specific to design build contractors.
4. Listing of delay claims, including at a minimum, description of the claim and time requested.
5. Provide analysis as to how you have eliminated waste while continuing improvements that resulted in a significant reduction in Contract Price on a Project, preferably twenty (20%) percent or more but, in any event, as applicable.

B. Proposed CSB/UCH Program and Project Team Organization (24 pages maximum)

1. Organizational charts for the CSB/UCH Program and all projects. Identify by name and title all of the proposed key personnel, and show how the project teams will be managed within the context of the program. Graphically indicate dedicated vs. shared project responsibilities. (4 page maximum, 11x17 format allowed)
2. Résumés demonstrating qualifications, training and experience of the key personnel who will be assigned to this program. Key personnel are defined as: Project Executive, Project Manager(s), Superintendent(s), MEP Engineer(s), Lead Project Engineer(s), BIM Coordinator(s), Scheduler(s) and Estimator(s). (16 pages maximum)
3. Management and staffing plan including the key personnel, their responsibilities, and their time commitments required to perform the Work. (2 page maximum, 11x17 format allowed)
4. Personnel that have worked together, particularly on the example project(s) submitted, will be scored favorably. Provide chart of proposed personnel and their last 5 project assignments (include all example projects included in Section 2A). (2 page maximum)

C. Proposed use of Last Planner™ System or similar tool to manage team performance across the CSB/UCH Program and on individual projects. Include example(s) from sample project(s). (2 pages maximum)

D. Proposed Claims Management method for the CSB/UCH Program. Describe and document methods you have used to identify and avoid potential disputes or claims, and how those may be adapted to a multi-project program. Evaluate the effectiveness of the methods used. Identify responsible key personnel. (2 pages maximum)

E. Design Build Subcontractor Coordination (4 pages maximum)

Proposed Design Build Subcontractor Coordination method across the SB/UCH Program and on individual projects. Describe how you plan to coordinate the Design Build
Subcontractors’ activities (each and together) in both the Design Phase and the Construction Phase, how your plan accommodates both the Program and the individual projects, and how it relates to past projects.

1. List key personnel responsible for Design Build Subcontractor Coordination in the organizational chart above, and describe their past project successes in design build subcontractor coordination.

F. Quality Assurance and Quality Control (6 pages maximum)

1. Narrative describing how you will organize the QA/QC approach for the CSB/UCH Program, how it will be developed in Phase 1–Pre-Construction, and how each project will be managed within the overall Program, from Pre-construction through Close-out. Include how you will identify and implement any program-based opportunities and efficiencies, and the approach for each specific phase.

2. Describe how you intend to comply with each element of Appendix No. 1 to Exhibit 17 of the Contract Documents, both for the overall program and for each project.

G. Site Logistics and Access (16 pages maximum, 11x17 format allowed)

Proposed approach, including schematic diagrams (plans, sections, 3D diagrams, etc.), schedule, and high level cost analysis, describing how you intend to provide the following for the duration of the program:

1. Temporary and Permanent Program site access adjacent to or through the construction operations boundary. Specifically address the following access requirements:
   a. Pedestrian access from the Koret Vision Research Laboratory to the School of Nursing, including access to CSB and UCH when they are not under construction;
   b. Permanent service & delivery access to the School of Nursing, including service pad access and accessible access to the pedestrian path entrance on the level below the service pad;
   c. Construction access for both materials and workers, and service & delivery access to UC Hall; and
   d. Construction access for both materials and workers, and service & delivery access to CSB.

2. Temporary Facilities for the University’s program/project management team, Design Professional team, CM/Contractor team, Design Build Subcontractor team, and other applicable Subcontractors for the duration of the program. University can make approximately 5,000 SF of space available on UC Hall Level 3 until construction operations commence in that building. Location of additional temporary facilities space during UC Hall construction has not yet been identified.

3. Relocation or stabilization of existing utilities currently routed through CSB and UC Hall.

Best value to the University will be scored favorably.
5. **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 Program.

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 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 applicable labor 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).
6. **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 the Program.

   YES [ ]   NO [ ]

C. Will your firm have personnel permanently assigned and dedicated to safety on this project?

   YES [ ]   NO [ ]

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. Attach EMR verification from State of California or from insurance company.

   EMR Rating: _____________

F. Does your firm have an EMR of .50 or lower?

   YES [ ]   NO [ ]

G. Have you had Cal/OSHA fines in the Serious, Repeat or Willful categories?

   YES [ ]   NO [ ]

   If yes, provide additional information. ________________________________

H. Verify that your company has Safety and Hazardous Waste Control programs and provide copies.

   YES [ ]   NO [ ]