

**University of California,
Santa Barbara**



Request
for
Proposals
for:

**Sedgwick Reserve
Ranch House
Renovation**

Project Number:

FM150067

Office of Design &
Construction

August 2014



**University of California, Santa Barbara
Sedgwick Reserve Ranch House Renovation
Project Number FM150067**

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EXHIBITS:

Statement of Qualifications Form	(See UCSB website for download at: http://web.facilities.ucsb.edu/contracts/proposals/)
Professional Services Agreement	(See .pdf file at hyperlink referenced above)
Executive Design Professional Agreement	(See .pdf file at hyperlink referenced above)
Certificate of Insurance	(See .pdf file at hyperlink referenced above)



ADVERTISEMENT

Project Name: Sedgwick Reserve Ranch House Renovation

Project Number: FM150067

Project Description

Proposals are hereby solicited from qualified professionals interested in providing programming, conceptual design services, preparation of bidding documents and construction administration services for the renovation of the Ranch House at Sedgwick Reserve.

The project will renovate the 4,100 SF Ranch House and bring it up to current building standards for safety, increase energy efficiency, and modify the interior spaces to facilitate future uses of the building. The main part of the house was constructed in 1947 and was expanded in phases throughout subsequent years.

The Ranch House is currently used for overnight accommodations for up to 13 people, small meetings and periodic events. Following renovation the occupancy will be lowered to 8 people. The renovation project would be sensitive to the existing architecture of structure. The building will meet the criteria for LEED Certification, with Gold as the target, and Silver as the minimum requirement.

The project construction budget is approximately \$1,300,000.

The planned date for completion of construction is Winter 2015/16.

Scope of Services

Work on this project will be authorized in two stages. The first stage will be conducted under a Professional Services Agreement (PSA) for development of a Detailed Project Program (DPP), including conceptual design and a detailed cost estimate. The programming and planning effort will seek to identify stakeholders' priority needs, verify project scope and produce a program document. The consultant will need to identify the cost for each project component to assist the campus in determining the affordable scope. Architectural and engineering services may include but are not limited to: general evaluation of existing conditions, identification of current and future site constraints, project programming, adjacency studies, LEED scoring, energy modelling, concept design, and cost estimating.

Planning work at UCSB is highly collaborative; consensus on recommended plans will be required between various campus departments and stakeholders.

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The second stage of the project will be conducted under an Executive Design Professional Agreement (EDPA) for architectural and engineering design, preparation of construction documents, support services during the administrative and environmental approval process, bidding assistance, construction phase administrative services, and surveys. Authorization to proceed with the second stage of services will be contingent on satisfactory completion of the initial stage, project approvals and appropriation of funding.

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 consultant will follow standard University procedures.

General Instructions for Prospective Proposers

Consultants with residential renovation, restoration and rehabilitation experience in higher education setting or rural ranch setting are encouraged to respond. A copy of the Request for Proposal form will be available on the Contracting Services website:

<http://web.facilities.ucsb.edu/contracts/proposals/> (click on the subject project link and download the project documents).

If you have difficulty downloading the document please call Ed Schmittgen at (805) 893-8343. Five (5) hardcopy sets and one (1) digital copy (.pdf) of each consultant team's Proposal must be delivered to UCSB by 2:00pm on **August 25, 2014** to the following address:

Attn: Ed Schmittgen, Associate Director
ed.schmittgen@dcs.ucsb.edu
Design & Construction Services
Facilities Management Bldg. 439, Room 'E'
University of California, Santa Barbara
Santa Barbara, CA 93106-1030

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 shall have equal access to contracts and other business opportunities with the University, regardless of: race; color; religion; sex; age; ancestry; national origin; sexual orientation; physical or mental disability; veteran's status; medical condition; genetic information; marital status; gender identity; pregnancy; service in the uniformed services; or citizenship within the limits imposed by law or University's policy.

Posted: 8/8/14



PROGRAM STATEMENT

The main part of the Ranch House was constructed in 1947; in 1952 the Sedgwick family purchased the ranchland and subsequently expanded the building multiple times. In 1997, the ranchland entered the Natural Reserve System (NRS) after the Sedgwicks bequeathed most of it to the University of California for interdisciplinary teaching and research. The remaining portion was acquired through efforts of the Land Trust for Santa Barbara County and numerous other supporters. The ranch is now referred to as the “Sedgwick Reserve”.

The Ranch House at Sedgwick Reserve is a 4,100 SF facility currently used to provide overnight accommodation for up to 13 reserve users, conduct small meetings and hold periodic events. The Ranch House will be renovated to bring it up to current building safety standards, to increase energy efficiency, and modify interior spaces to better facilitate current and future uses of the building. After renovation the occupancy will be lowered to 8 users.

The project will include structural and utilities upgrades, and alterations to the configuration of the interior spaces which will enhance the Ranch House’s role as a research center with facilities for overnight stays.

Modifications to the interior spaces will include reconfiguring the main entrance and one restroom to meet ADA standards, enlarging the kitchen to accommodate simultaneous use by two groups, adding a small restroom proximate the kitchen and potentially repurposing existing spaces for new uses.

Possible exterior modifications will include relocating the front door, replacing the single-pane windows with energy-efficient windows, painting the exterior and removing an existing chimney and fireplace. Repair work, as required, will be conducted as part of the project to bring the building back into good order.

All modifications will be sensitive to the history of the Ranch House, its original architecture, color and material selection. By campus policy the renovation project will, at minimum, meet the requirements to achieve LEED Silver.

SCOPE OF SERVICES

Projects at UCSB involve participation by faculty, staff and students in several forums established to engage stakeholder groups in the decision making process. Reviews and approvals of projects extend to public interest groups and public agencies in the surrounding area. The scope of services anticipates full support of the selected Design Professionals during the public process of developing plans for the project.

Work on this project will be authorized in two stages. The first stage will be conducted under a Professional Service Agreement (“PSA”) for the preliminary services of the Detailed Project Program, Conceptual Design and a Detailed Cost Estimate (combined into a single document). The second stage of the project will be conducted under an Executive Design Professional Agreement (“EDPA”) for architectural and engineering design, preparation of construction documents, code analysis, value engineering, project scheduling, and coordination with regulatory agencies, support services during the administrative and environmental approval process, bidding assistance and construction phase administrative services including submittal reviews and field representation.

Any work beyond the first phase is subject to obtaining funding and project approval. Selection of the design professional will follow standard University procedures.



SERVICES PROVIDED BY UCSB

1. Assistance with organizing and scheduling meetings with campus constituents.
2. Access to existing drawings and planning documents.
3. Review of documents for project conformity.
4. Delineation of planning constraints specific to the Project.
5. Environmental Analysis (CEQA).
6. On-site construction phase management and inspection.

PROJECT LOCATION SITE PHOTO:

34.693177, -120.039184



For pictures of the Ranch House follow link: <http://sedgwick.nrs.ucsb.edu/facilities/ranch-house>

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PROJECT SCHEDULE*

Advertisement	August 8, 2014
RFPs Due at UCSB by 2:00pm	August 25, 2014
Screening Committee/Selection of Short-listed firms	August 25-27, 2014
Notify Shortlisted Firms <i>The selected short-listed firms will be posted on the UCSB Design, Construction, & Physical Facilities website, on the project page under "Request for Proposals"</i>	August 29, 2014
Finalists' Interviews	September 4, 2014
Successful Candidate Notified <i>The anticipated schedule is tentative. The exact dates will be set forth in a Notification letter to the selected Consultant.</i>	September 8, 2014
Consultant's Fee Proposal Due	September 15, 2014
Fee Negotiations	September 16-22, 2014
Contract Award	September 22, 2014
Kick-off Meeting	September 23, 2014
DPP complete to UCSB	December (TBD) 2014

**Note: All schedule dates are tentative and subject to change at the sole discretion of the University.*



INSTRUCTIONS TO APPLICANTS

1. Respond concisely to the Selection Criteria and complete the Statement of Qualifications Form. The Statement of Qualifications must be signed by a responsible member of the firm applying for the project.
2. Provide a list of projects of similar scope and complexity along with team member's roles, project construction budgets, bid amounts, and final change order amounts related to errors and omissions. Please also address the scheduled duration of construction and total of delays attributable to errors and omissions. Project statistics should include a detailed description and a contact person with a telephone number.
3. Your Proposal should address the following:

Work Plan - Provide a comprehensive work plan demonstrating how your firm intends to accomplish the initial planning and programming effort described in the Project Description and Program Statement; include a draft schedule. The schedule and work plan will exclude design and construction phases.

Design Issues – How will the team approach incorporating the participation of campus community members into their planning and design processes? How will the team approach developing a project that responds to the context of existing facilities? How will the team respect the historical importance of the Ranch House? What will be the team's approach to dealing with issues of sustainability, use of energy resources, affordability and prioritization of design goals within the project budget? How can the site be used to achieve its full potential? How can the project improve the Reserve in general and enhance the area in particular?

Cost Control – What mechanisms or procedures will the team implement during the programming, design, and construction document phases to control costs?

Professional Services Agreement – Note any exceptions to the enclosed Agreement that would prevent your firm from executing the Agreement. The University 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 enclosed Agreement.

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Billing Rate(s) – **IN A SEPARATE, SEALED ENVELOPE**, please provide a copy of the current fully burdened billing rate(s) schedule for relevant personnel for your firm and for all proposed consultants.

Certificate of Insurance – Note any exception to the Certificate requirements and provisions that would prevent your firm from executing an Agreement. Proposal submittal shall include a separate letter affirming the intent of the proposer’s acceptance of terms and conditions contained in the Certificate of Insurance (see enclosed certificate). Minimum Insurance limits are as follows:

General Liability:	Amount
Comprehensive or Commercial Form	
Each Occurrence	\$1,000,000
Products/Completed Operations Aggregate	\$2,000,000
Personal and Advertising Injury	\$1,000,000
General Aggregate	\$2,000,000
Business Automobile Liability	Amount
Each Occurrence	\$1,000,000
Workers’ Compensation	as required under California State Law
Professional Liability	Amount
Each Occurrence	\$1,000,000
Project Aggregate	\$1,000,000

Malpractice Claims – List malpractice claims adjudicated within the last 5 years or currently pending. Identify the projects. Provide the same information for your proposed sub-consultants. List any lawsuits pending with the Regents of the University of California. List past lawsuits with the Regents of the University of California and indicate if a settlement was paid to the University. List all current and past UC projects, name of UC Project Manager and telephone number.

Individual Experience – Submit resumes of the responsible Partner, the Project Manager, the Principal Designer and technical consultants focusing on relevant experience of those individuals and university experience (not the collective corporate experience of the firm).

Work Location – Identify any portions of the consultant’s scope of work that will be performed outside of the office responding to the RFP and the individuals responsible for that work. If a sub-consultant firm is involved, explain their role and the planned division of responsibilities.

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4. Include supplementary information supporting qualifications (8 ½ x 11 format). Organization and brevity will be appreciated. Additional information may be submitted demonstrating experience in programming, planning and design on similarly scaled and scoped projects. Identify the engineering team and consultants for all projects listed as examples of your firm's work. Provide information on proposed engineering staff and consultants for this project and an organization chart. Provide a list of previous projects the proposed team has participated in together.

5. **Return to:** Ed Schmittgen, Associate Director
Design & Construction Services
Facilities Management Building 439, Room "E"
University of California, Santa Barbara
Santa Barbara, CA 93106-1030

6. Submit (5) hardcopy sets and one (1) digital .pdf copy of each consultant team's proposal all material bound as separate documents.

7. Due Date: **August 25, 2014** no later than 2:00 p.m.

8. Design teams with qualifications considered appropriate by the Screening Committee may be asked to interview with the Selection Committee.



SELECTION CRITERIA

1. **Planning 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 planning and programming problems specific to the needs of the 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. **Client relationships.** Recognition of the consultative processes associated with work at the University.
5. **Production capability.** Evidence of ability and capacity 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 all phases of the project.
7. **Proximity.** Proximity of the Consultant's headquarters office to the project location, willingness to establish a local office or an association with a local consulting firm.
8. **Equal Opportunity.** The commitment of the University to equal opportunity applies to the selection of planning 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 Planning 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 Capital Development, Budget & Planning, and the Office of Design & Construction, Facilities Management, University of California at Santa Barbara in consideration of commissions to Design and Planning Professionals.

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

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

Associate Director, Contracting Services
Design & Construction Services
University of California, Santa Barbara
Facilities Management Building 439
Santa Barbara, California 93106-1030