



Request for Proposal

for

Rochester Institute of Technology

NYSERDA Consultant

Proposal is due by January 14, 2025 at 2:00 P.M.

Address proposal responses to:

Procurement Services Office
Angela Nkugwa
Strategic Sourcing Specialist
124 Lomb Memorial Drive
Rochester, NY 14623
ankps@rit.edu

Table of Contents

1. INTRODUCTION	3
2. BACKGROUND INFORMATION	3
3. PROJECT SCHEDULE	3
4. CONTRACT AWARD IN BEST INTEREST	3
5. NON-DISCRIMINATION COMPLIANCE	4
6. CONFIDENTIALITY	4
7. INSTRUCTIONS FOR SUBMITTAL	4
8. REQUESTS FOR INFORMATION OR CLARIFICATION OF REQUIREMENTS	5
9. SCOPE OF WORK AND GENERAL REQUIREMENTS:	5
10. EVALUATION CRITERIA:	6
Section A of the Evaluation Criteria: Pricing	6
Section B of the Evaluation Criteria: Operating/Project Specific Requirements	7
Section C of the Evaluation Criteria: Quality Metric/Performance Metrics	7
Section D of the Evaluation Criteria: Evidence of Business Performance	7
Section E of the Evaluation Criteria: Sustainability (Green Strategy)	7
Section F of Evaluation Criteria: Terms and Conditions	7
11. ATTACHMENTS & REFERENCES	8

1. INTRODUCTION

Rochester Institute of Technology (RIT/University) is soliciting competitive written proposals for **Consultant Services** to develop a clean energy master plan for the Rochester Institute of Technology Henrietta campus and Rochester Regional Health Buildings.

The proposal must meet the material, performance and quality requirements detailed in the Scope of Work. In order to be considered, all submissions must address each of the Evaluation Criteria detailed in Section 10 and specifically detail the fee schedule included in Section A.

2. BACKGROUND INFORMATION

RIT, founded in 1829 as The Rochester Athenaeum, has grown to become one of the nation's largest private universities. RIT is a not-for-profit, privately endowed, co-educational university comprised of nine colleges emphasizing career education and experiential learning. The University occupies 1,300 acres in suburban Rochester, NY located on Jefferson Road in the Town of Henrietta.

Current enrollment on the Henrietta campus is 16,874 undergraduate and graduate students, from all 50 states and more than 100 nations, with 3,974 faculty and staff. RIT owned and operated residence halls and apartments house more than 7,000 students during the academic year.

3. PROJECT SCHEDULE

- | | |
|-------------------------------------|--|
| 1. Request for Proposal Issued | <i>November 21, 2024</i> |
| 2. Pre-proposal meeting (mandatory) | <i>December 3, 2024 at 11:30 A.M. (Zoom)</i> |
| 3. RFI's Due Date | <i>December 6, 2024, EOD</i> |
| 4. <i>Proposal Due Date</i> | <i>January 14, 2025 by 2:00 P.M.</i> |
| 5. Finalist Presentations (2) | <i>TBD</i> |
| 6. Contract Start (tentative) | <i>February 2025</i> |

Award of contract is contingent on receipt of an executed RIT Agreement within two weeks of notification to the successful proposer.

4. CONTRACT AWARD IN BEST INTEREST

RIT reserves the right to accept or reject proposals on each item separately or as a whole, to reject any or all proposals without penalty, to waive any informalities or irregularities therein, and to contract as the best interests of the University may require in order to obtain service requirements which best meet the needs of RIT.

5. NON-DISCRIMINATION COMPLIANCE

RIT neither affiliates with nor grants recognition to any individual, contractor or organization, on or off campus, having policies that discriminate on the basis of age, citizenship, color, creed, culture, including deaf culture, disabilities, gender, marital status, national origin, political affiliation or preference, race, sexual orientation, gender identity or gender expression as defined by applicable laws and regulations. Provider agrees that it will comply with all Federal, State and Local regulations.

Contractor and/or subcontractor shall abide by the requirements of [41 CFR 60-741.5\(a\)](#). This regulation prohibits discrimination against qualified individuals on the basis of disability, and requires affirmative action by covered prime contractors and subcontractors to employ and advance in employment qualified individuals with disabilities.

Contractor and/or subcontractor shall abide by the requirements of [41 CFR 60-300.5\(a\)](#). This regulation prohibits discrimination against qualified protected veterans, and requires affirmative action by covered prime contractors and subcontractors to employ and advance in employment qualified protected veterans.

6. CONFIDENTIALITY

If in the course of the Provider receiving information from RIT to respond to the RFP hereunder, the provider receives proprietary information of RIT relating to RIT's business, operations, equipment, or products, the Provider will retain all such information in confidence and will not disclose it, except to its own and RIT's employees in the necessary course of the performance of responding to the RFP hereunder. However, nothing herein will prevent disclosures by the Provider of any information after it is available to the general public in a printed publication, or of any information that was already available to the Provider from written documents in the Provider's possession at the time such information was acquired from RIT, or of any information furnished to the Provider by a third party. The Provider shall protect the confidential information against unauthorized disclosure using the same degree of care, but no less than a reasonable degree of care, as the Provider uses to protect its own confidential information of a like nature. The Provider will insure that each employee or subcontractor agrees to similar confidentiality requirements.

7. INSTRUCTIONS FOR SUBMITTAL

It is mandatory that one electronic version of the RFP be submitted via e-mail following proposal outline and date requirements, along with a detailed statement of any exceptions to any part of the request (with reference to the specific sections involved). Each of the sections of the Evaluation Criteria (Heading 10) must be individually addressed and fully detailed.

Without exception **all forms of requested proposal must be e-mailed only to ankpsso@rit.edu** on or before **2:00 PM on Tuesday, January 14, 2025.**

8. REQUESTS FOR INFORMATION OR CLARIFICATION OF REQUIREMENTS

During the proposal preparation period, requests to clarify certain aspects of the RFP package or Requests for additional information must be in writing and sent to the individuals identified below. The University's response providing additional information or clarification will be sent to all prospective proposers. In addition, any University-initiated changes to the governing documents in the RFP package will be provided to all prospective proposers as addenda to the RFP. The University will not be responsible for explanations or interpretations of the RFP by any other means.

Requests for additional information or clarification of requirements must be submitted electronically no later than **December 6, 2024, EOD** to:

Technical: Raymond Orr
Associate Vice President
Facilities Management Services
rkofms@rit.edu

Enid Cardinal
Senior Advisor
Office of the President
elcpro@rit.edu

Contractual: Angela Nkugwa
Strategic Sourcing Specialist IV
Procurement Services
ankpsso@rit.edu
585-475-4465

9. SCOPE OF WORK AND GENERAL REQUIREMENTS:

Develop a clean energy master plan and decarbonization road map for the Rochester Institute of Technology Henrietta campus and Rochester Region Health Buildings to effectively meet their sustainability goals, best position ourselves for operating under the CLCPA Legislation, and align ourselves financially for the foreseen energy market conditions.

The master plan should provide clear direction and timing for the investment and implementation of technology and systems that are available to the RIT campus and RRH Buildings based on sound analysis of the technology being developed, financial markets analysis, and operational efficiency. The NYSERDA Scope of Work document ([Exhibit A](#)) provides an outline of the specific scope and requirements for this Request for Proposal. In addition,

- The consultant will include an assessment and recommendations for NYSERDA, Utility, or other funding sources that would apply toward projects recommended through this report.
- The consultant will develop, prepare and present a presentation for RIT and RRH Administrators that includes at a minimum the following items
 - an overview of the recommendations
 - prioritized list of projects
 - the developed financial models
 - timeline

10. EVALUATION CRITERIA:

Proposals will be evaluated based on the following bid submission requirements: Please label each section of the proposal as indicated below. *The RFP response should be structured with a page limit of 8-10 pages as a guideline.*

If selected as a finalist, you will be required to provide a presentation to the selection team.

Section A of the Evaluation Criteria: Pricing

Please provide pricing for the tasks listed below as associated with the Scope of Work. The pricing must be submitted on the [T&M Pricing Template](#) and submitted as an electronic file.

Task #	Description
0	Project Management and Progress Reporting
1	Assess building level load reduction strategies
2	Asses system/district level improvement strategies
3	Assess opportunities for renewables
4	Assess Synergies co-benefits, and human impact
5	Strategic Financial Modeling
6	Development of Implementation Plan
7	Guidelines, Standards and Detailed Design
8	Final Synthesis, Review, and Roadmap Report

***Please ensure that the pricing is broken down by task and includes all relevant costs. All ancillary costs and reimbursables should be included as well.**

Section B of the Evaluation Criteria: Operating/Project Specific Requirements

- **Provide a narrative confirming your teams' understanding** of the requested consultant services.
- **Provide a narrative describing the approach and methods** that will be used to develop financial models and predict future energy market conditions. **Describe** your experience with this and approach and methods.
- **Complete the [Vendor Assurance of No Conflict of Interest Form](#)**

Section C of the Evaluation Criteria: Quality Metric/Performance Metrics

- **Provide a narrative** of your firm's experience in providing services similar to those outlined in this RFP.
- **Provide a narrative** of your firm's or team's experience and with similar NYSERDA project and ability to meet the engineering and reporting requirements of NYSERDA.

Section D of the Evaluation Criteria: Evidence of Business Performance

- **Describe your proposed project team** for our project. Include the **relevant** experience and qualifications of specific team members who will be leading efforts outlined in this RFP.

Section E of the Evaluation Criteria: Sustainability (Green Strategy)

RIT recognizes that sustainability is a concept that seeks to provide the best outcomes for human and natural environments by meeting the needs of the present generation without compromising the ability of future generations to meet their needs. RIT has prided itself on energy efficient design and construction.

- **Please outline your sustainability efforts** and describe how your firm's commitment to sustainability will provide value to our project.

Section F of Evaluation Criteria: Terms and Conditions

1) RIT Independent Contractor Contract

RIT requests a single contract with the Consultant firm. Please indicate your acceptance of the RIT Independent Contractor Contract as attached:

[RIT ICC](#)

- 2) General Contract Provisions, Terms and Conditions (NYSERDA)
Indicate your acceptance of the attached Exhibit B:
[Exhibit B](#)
- 3) Standard Terms and Conditions For All NYSERDA Agreements
Indicate your acceptance of the attached Exhibit C:
[Exhibit C](#)
- 4) Insurance and Indemnification:
Indicate your acceptance of RIT Insurance and Indemnification specifications as outlined on RIT's Procurement Services website at:
[Insurance and Indemnification](#)
- 5) Purchase Order Terms and Conditions:
The Contractor will accept and adhere to RIT Purchase Order Terms and Conditions as outlined on the Procurement Services website at:
[RIT Purchase Order Terms and Conditions - March 2022.pdf](#)
- 6) PaymentWorks:
RIT has partnered with PaymentWorks to provide a secure supplier onboarding portal. RIT joins many other higher education institutions that have also implemented PaymentWorks to automate the vendor management processes, protect against business payment fraud, and ensure regulatory compliance. This solution cuts down on the use of paper forms and manual circulation of supplier information. The use of the portal is free of cost to our suppliers and will provide a secure method for providing new or updated information, and will give additional visibility into the payment process. The successful bidder will be required to onboard through this PaymentWorks system PRIOR to contract execution. For more information on PaymentWorks, please visit [our website](#).
- 7) Vendors & Contractors Parking
Please acknowledge that you have read and understood the parking policy. Ensure that any associated costs are included in your pricing. For more details, refer to the policy at: [RIT Parking Policy for Vendors & Contractors](#).

11. ATTACHMENTS & REFERENCES

[Bid Documents](#)