

November 8, 2024

To: Sustainability Consultant (the Professional)  
Re: **Request for Proposal (RFP)** – Professional Services  
UP-DGS Sustainability Building Guidelines

The Pennsylvania State University (the Owner) is seeking proposals from qualified Professionals to provide professional services for the project mentioned above. If you are chosen to provide these services, they will be carried out under the Owner's 1-S Agreement.

### **Overview**

The Penn State Office of Physical Plant (OPP) and Penn State Sustainability are collaborating with the Pennsylvania Department of Environmental Protection (DEP), the Department of Conservation and Natural Resources (DCNR), and the PA GreenGov Council to develop building sustainability guidelines for the Pennsylvania Department of General Services (DGS) **Capital Programs**. These guidelines aim to reduce greenhouse gas emissions, energy consumption, and embodied carbon in construction materials, while promoting renewable energy and reducing life cycle costs. The guidelines will be integrated into current capital project processes and support ongoing professional development in sustainable design and construction principles.

This project builds on the [Sustainable Building Video Series](#) published in early 2024 and aims to enhance the impact of sustainable principles across Commonwealth projects. The [OPP's LEED Policy Guide \(2019\)](#) and [Sustainable Design Guidelines](#) will inform this initiative. [Penn State Sustainability](#) will provide expertise and resources, engaging subject matter experts as needed.

### **Objectives**

The primary objectives of this project are to:

- Develop sustainability guidelines for incorporation into the DGS Capital Programs processes.
- Create educational tracks for Project Managers to enhance awareness and implementation of sustainable principles.
- Promote the delivery of resource-efficient buildings that enhance human and environmental health, wellbeing, and performance.

### **Scope of Work**

The selected consultant will work with Penn State's Office of Physical Plant (OPP) and Penn State Sustainability to:

- Explore and benchmark against sustainable building guidelines and project processes at similar organizations.
- Explore existing **Capital Programs** project processes that incorporate the objective of a more sustainable and high-performing project with a focus on the DGS Capital Program Project Delivery System.
- Host a kick-off and monthly meetings to discuss work in progress and review the approach that is being used to produce the proposed deliverables.
- Produce, finalize, and incorporate sustainable guidelines and improved processes into the DGS Capital Program Project Delivery System.
- Develop educational program to elevate awareness of sustainable principles and improved project processes to help produce a more sustainable project.

**Deliverables**

The consultant will be responsible for the following deliverables:

- Sustainable building guidelines document.
- Recommendations for improvements to project processes.
- Educational program materials for Project Managers.
- Monthly status reports and draft versions of proposed improvements.

**Project Direction, Project Management, and Reporting**

In summary, the Professional’s involvement spans communication, coordination and collaboration activities necessary to lead a successful cross-functional team. Responsibilities include:

- Collaboration with Owner interns.
- Provide monthly status report to project sponsors.
- Hold project coordination meetings with DEP, DCNR, GreenGov, and DGS staff (at least once each month).
- Continually monitor the progress of the work through monthly project management team meetings.
- Provide DEP, GreenGov, and DGS staff with draft versions of proposed improvements to project processes and educational recommendations.
- Solicit feedback prior to finalizing the proposed sustainable building guidelines and improvement to project processes.

**Budget and Schedule**

The initial budget for this engagement is approximately \$70,000 including soft costs and reimbursables. The following is a preliminary project timeline:

Project Task Description	2025		2026
	Jan-May	Jun-Dec	Jan-Mar
Explore and benchmark against sustainable building guidelines and project processes at similar organizations.	X		
Explore existing Capital Programs project processes that incorporate the objective of a more sustainable and high-performing project with a focus on the DGS Capital Program Project Delivery System.	X		
Host a kick-off and monthly meetings to discuss work in progress and review the approach that is being used to produce the proposed deliverables.	X	X	
Produce, finalize, and incorporate sustainable guidelines and improved processes into the DGS Capital Program Project Delivery System.		X	
Develop educational program to elevate awareness of sustainable principles and improved project processes to help produce a more sustainable project.		X	
Implement deliverables and educational program			X

**Selection Process**

The successful Professional will be chosen based on qualifications using a best value approach. Experience with the development of sustainability guidelines and educational materials within an institutional context is essential. The Professional should have specific green building design and construction expertise. Qualifications should cover principles of Sustainable Design, including:

- greenhouse gas emissions
- overall energy consumption
- embodied carbon in construction materials
- renewable energy
- life cycle operations and maintenance costs
- grid-interactive efficient buildings

Please submit a proposal by **12pm on December 2, 2024**. Include a summary of your team's qualifications, collaborative approach, and project-specific key drivers. Refer to the attached **Fee Proposal Guidelines** for additional requirements. Please limit your submission to two (2) single sided A3's and submit one electronic copy via email addressed to my attention. In the subject line/field of your email submission, please type: "UP-DGS Sustainability Building Guidelines RFP [- *your firm's name here*]. The deadline for questions is November 25, 2024. Interviews, if required, will follow via Zoom. Additionally, the above dates are target dates established by the Owner. The Owner reserves the right to modify the dates as/if it deems necessary.

We appreciate your interest and time regarding this request. Please contact me with any questions.

Sincerely,

*Robert Lingenfelter*

Robert Lingenfelter, AICP, PLA, LEED AP  
Project Manager, Design & Construction  
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CC: Project File  
Attachments: Fee Proposal Guidelines for A/E Agreements

## Fee Proposal Guidelines for A/E Agreements OPP Design & Construction

To expedite A/E proposal review and Agreement processing, please be aware of and share the guidelines noted below.

### The Fee Proposal will:

- Address only the Scope of Work that is being agreed to.
- Be on company letterhead, indicating the company's physical address.
- Indicate the date of the proposal.
- Indicate the PSU Project Number.
- Indicate the PSU Project Name.
- Be signed by a representative of the A/E firm who has the legal capacity to bind the firm contractually.
- Include the email address of the person to whom the Agreement should be sent.
- Acknowledge contract type: "***By submitting a proposal your firm acknowledges that they concur, without exception, to the terms, conditions, and provisions as contained in the 1S or 1P Agreement.***"

### The Fee Proposal should include:

- Project Description and Understanding of Scope
- A/E's Scope of Work; Description of tasks or services, deliverables at each project phase, identify any Additional Services.
- A/E's Proposed Schedule; Identify project start, milestones, any differences between the original project schedule and the A/E's proposed schedule.
- A/E's Proposed Fee; Identify proposed fee by project phase, deliverable, or task. Include hourly billable rate schedule.
- Reimbursable Expenses, if applicable. Include detailed breakout.
- Design Team Members; Identify scope and discipline for primary team members. Identify Prime and Subconsultant(s).

### The Fee Proposal should NOT include language that pertains to:

- Legal responsibilities
- Terms & Conditions
- Termination of agreement
- Claims or dispute resolution
- Ownership of documents
- How extra services will be procured
- Payment or service charges for late payments
- Insurance
- Indemnity or 'hold harmless' clauses or other similar language
- Mark-up on reimbursable expenses
- Do not accept proposals with cross-outs, changes, conflicting information, bits and pieces of proposals from different dates, initials of the parties.
- Subconsultant(s) proposals should NOT be included in the A/E's proposal.

**Be sure to include language in the RFP stating that, by submitting a proposal, the firm acknowledges that they concur *without exception* to the terms, conditions, and provisions as contained in the Agreement.**