

DATE: Friday, January 14, 2022

SUBJECT: **Interview Notice – Master Plan Study for East Campus Chilled Water Plant (ECCP) and Chilled Water (CHW) Thermal Energy Storage (TES)**
The Pennsylvania State University – University Park Campus
PSU Project No: 00-07057.00

TO: **Short-listed A/E Teams**
Ballinger
Burns & McDonnell
Leers Weinzapfel Associates & RMF Engineering

Short-Listed Teams:

Thank you to all eleven (11) Long-listed firms for your proposal submissions. Based on our review of the proposals, the Screening Committee has selected the above three (3) teams as the Short-list for this project.

We are excited to have everyone participate in the A/E Team Selection process for this project. It has been determined that the interviews will be held in a virtual interview format, to take place on Friday, January 28, 2022. Key project dates are included herein.

INTERVIEW SCHEDULE – Friday, January 28, 2021

<u>Interview</u>	<u>Time</u>	<u>Interviewing Team</u>
Interview #1	9:00 – 10:15 AM	TBD
Interview #2	10:45 AM – 12:00 PM	TBD
Interview #3	1:15 – 2:30 PM	TBD

VIRTUAL INTERVIEW INSTRUCTIONS

Penn State will invite each A/E team utilizing Penn State’s Zoom remote meeting platform. Each team is encouraged to utilize the tools or features of the platform, and all other tactics, to establish a high level of interaction/conversation. As a best practice, teams should designate an individual to be the point person for the interview, guiding the flow of topics and/or directing conversations to certain individuals. Additionally:

- The times listed above are the scheduled times for each session. To ensure we start each session on time, each virtual meeting platform will be open and available to the PSU Screening Committee ten (10) minutes before your assigned time. Additionally, all interviewing team members and PSU Screening Committee members are to join the virtual meeting five (5) minutes prior to the session.
- Each session will have its own separate link, which will be provided via an Outlook meeting invitation.

- Utilizing the video feature is strongly encouraged to promote a strong dialogue and personal engagement unless specific technology challenges are present.
- If you join the Interview via two devices (laptop and mobile/tablet), make sure that you quickly mute the microphone and speaker of one of the devices.
- As the administrators, Nate Patrick and Greg Kufner will act as the “host” for all sessions, allowing everyone to join and assigning screen sharing capabilities. At the start of the session, please indicate which team member will be controlling the visuals so permissions can be quickly adjusted.

Please note: If are having trouble during the day of the interviews, please call Nate Patrick’s cell phone at (814) 826-8458.

INTERVIEW FORMAT

- The interview format will be 5-minute introductions, 45-minute presentation, followed by a 20-minute question and answer (Q&A) session, and 5-minute closing.
- At the beginning of the interview, Nate Patrick will serve as the PSU moderator, and then introduce each Penn State stakeholder. Next the A/E team will introduce themselves. Please include your name and title/firm. Please be brief, in order to conserve interview time.
- The presentation can be given in any format of your choosing. Time will be strictly kept.
- The Q&A time will consist of the PSU stakeholders asking questions to the A/E Team as time allows.
- If time is left after the Q&A time, you will be given time for closing remarks.

INTERVIEW REQUIREMENTS

As part of the presentation, your team should clearly describe why you believe you are the best team for this project, including explanation of your team’s differentiators. We request that you address the topics highlighted below. Present this information in the format, topic duration, and arrangement of information, best suited to your team.

- Team: Introduce interview team members and their role on the project. Review overall team organizational chart and identify the role of key team members and any sub-consultants.
 - Describe in reasonable detail how your team dynamics will function during the study phase of this project.
 - Identify who will be leading each facet of the study.
 - Explain how your team will collaborate within your team and with the University.
 - Explain the unique qualities that your team brings to this project.
- Experience: Discuss your team’s most relevant previous project experience that you team has done together. Explain how it is relevant to this project.
 - Discuss lessons learned along with similarities and differences between those projects and this project.
 - If there are team members that have not worked together on previous projects, please explain your approach to teaming together and how you will generate cohesiveness.
- Project Approach. Describe your approach to project success, including, but not limited to:
 - Describe your expectations of PSU staff in the study/design process, including what you need from PSU to make this project successful.
 - How will your team guide and lead decision-making processes?

- Virtual Meeting Approach/ Interaction. As noted previously, within your presentation, highlight how your team would leverage virtual meetings, interactive tools, and/or other meeting techniques that you will utilize in the study/design of this project.
- Technical Questions. Discuss your overall approach to the following:
 - Site evaluation and selection.
 - Evaluation of options for various building and tank façade materials.
 - Central chilled water plant design.
 - Thermal energy storage tank design.
 - Underground chilled water and electrical infrastructure.
 - Coordination around other existing underground utilities and infrastructure.
 - Approach to hourly energy modeling and load analyses.
- Project Schedule/Staffing. Describe your approach to achieving the proposed project schedule, including:
 - Discuss how you propose to begin your efforts on this project.
 - Address your team’s availability, particularly considering other project/firm workload.
 - Explain your proposed schedule for the study phase of this project.
- Cost Control: Describe your cost control approach, including, but not limited to:
 - Identify major cost risks and mitigation techniques.
 - Provide concepts and methods utilized on similar past projects for developing and managing budget cost information for various design concepts/options.
 - How will your team develop the scope and budget for each phase of this project? How would your team manage this budget moving forward?
- Project-Specific and Program:
 - Provide your understanding of the project. Provide your impression of the project program, project goals, and other provided information.
 - Discuss your approach to comparing design options to meet the stated project goals and making design decisions while providing the most value to the project.
 - How will your team build consensus and create collaboration amongst a diverse group of stakeholders?

Ideas should be conceptual – we do not expect building designs as a part of the presentation!

Limit your team’s attendance to a maximum of eight (8) people total. This limit does not count any non-presenting, AV/IT support personnel. If you think this number is too limiting, please email me with your justification why, and I will make a decision on this.

We strongly prefer to meet with the key contacts for the project team that will be working with the University on a daily/weekly basis. Executive level representation who will not actively participate in the study phase of the project should not attend the interview. As such, please email me a list of your team members that will participate in the interview no later than 5:00 PM ET on Thursday, January 27, 2022.

Please email a copy of your interview presentation by 5:00 PM ET on Friday, January 28, 2022 for the University’s use and reference, via file sharing or similar (if the file size exceeds 20 MB).

FEE PROPOSAL REQUIREMENTS – Basic Services Fees & Reimbursables

Please refer to and use the separately attached PDF file labeled “AE Fee Template ECCP & CHW TES.”

Prior to your interview, please provide your A/E team’s proposed study phase fees in a single PDF file via email to Nate Patrick at ntp111@psu.edu by the submission deadline of Thursday, January 27, 2022 at 4:00 PM ET. Include the subject line that states, “PSU 00-07057.00 ECCP & CHW TES Fee Proposal from <Insert Firm Name Here>”.

Please know that your fees will not be looked at nor shared with the other Screening Committee members until after all interviews have been completed and qualifications have been reviewed, analyzed, and discussed.

Basis Services Fees. Provide your A/E team’s proposed non-binding basic services fees for the study phase of the project. Additionally, provide a listing of your team’s billable rates for reference in your proposed fees PDF file.

Reimbursables. Provide your A/E team’s proposed reimbursables for travel, lodging, meals, printing, etc. for the study phase of the project. As stated in the standard 1-S Form of Agreement, please note that the University does not allow any mark-ups on reimbursable expenses (factor of 1.0 only).

Please do not hesitate to contact me (via e-mail) with any specific questions or concerns pertaining to this A/E team selection process and interviews. If there are questions that will benefit both teams, I will make every effort to provide each team with equal information.

Kindest Regards,



Nathan T. Patrick, P.E., DBIA
Project Manager, Design and Construction
Office of Physical Plant (OPP), The Pennsylvania State University

cc: ECCP & CHW TES Screening Committee