

November 26, 2024

To: Sustainability Consultant (the Professional)
Re: Request for Proposal (RFP) - Professional Services
UP-DGS Sustainability Building Guidelines
Addendum No. 1

The Penn State Office of Physical Plant (OPP) and Penn State Sustainability are issuing an addendum to the original November 8, 2024, RFP. The original RFP documents and any previously issued addenda remain in full force and effect. The following questions and answers are provided as a matter of information to clarify issues raised about the RFP.

1. Questions and Answers

- 1.1. Would you like us to provide a fee breakout for each of the 6 tasks listed?
That would be nice but not necessary.
- 1.2. Is the budget fixed, or would you be open to scope options that exceed \$70k?
The budget is fixed.
- 1.3. For the educational program, could you provide a conceptual format to help us establish a fee? For example, will this be similar to the previous video series and if so, would we provide production or would that be by PSU? Or would this be more like a series of interactive virtual workshops with DGS PMs?
The educational program is expected to be commensurate with the budgeted fee. The program format is influenced by the professional's approach. Video production is not anticipated.
- 1.4. The qualification competencies listed include energy, GHG, and operations. To what degree should we anticipate IEQ / health, resource use / materials, and ecology to figure in the Guidelines effort?
While the principles are not limited to those listed in the RFP, they are the preliminary drivers identified by the team.
- 1.5. Are any portfolio-level services anticipated in this effort - such as recommendations for tracking or a framework for prioritizing investments relative to impact?
Portfolio-level services are not a part of this request.
- 1.6. The RFP calls for using Penn State's sustainability guidelines to inform this DGS initiative. For the benchmarking scope, is the reference to "similar organizations" referring to other higher-ed institutions or to government entities with capital programs like those of PA DGS? Are there preferred organizations that we should include in our benchmarking exercise?
The reference to "similar organizations" is referring to government entities with capital programs like those of PA DGS and state related entities with capital programs like those of Penn State.
- 1.7. How many drafts of the proposed improvements are expected and at what frequency should they be delivered over the second half of 2025?
The number of drafts of the proposed improvements is influenced by the professional's approach.
- 1.8. Who will provide feedback on the proposed sustainable building guidelines? Project managers? DGS? Penn State?
Feedback will be provided by project collaborators including DEP, DCNR, GreenGov, and DGS.
- 1.9. Will you please confirm the level of detail and overall sophistication expected for the sustainability guidelines, with respect to the previously established Sustainable Design Guidelines?
The Department's Capital Programs (formerly Public Works) bureaus coordinate and oversee the design and construction of all non-highway capital construction projects for the Commonwealth.

The scope of responsibilities includes new construction and all types of alterations and renovations to existing commonwealth properties and capital improvement projects for all state agencies. Projects range from dams and sewage treatment plants to buildings such as prisons, offices, and laboratories. The professional will work with project collaborators to develop practical principles that align with bureau responsibilities, provide holistic benefits, and include tools to assist in implementing these practices.

- 1.10. Are there desired formats of deliverable(s)? Please clarify per deliverable (i.e. PDF, Word, PPT, etc.).
Formats may vary depending on the process and the professional's approach. For example, formats may include, but are not limited to, live Word documents for ongoing collaboration and PDFs for final submissions.
- 1.11. For the educational program, are there specific formats requested for educational materials? Is the program curriculum intended to contain only proprietary content, or is it also inclusive of external resources?
The educational program is expected to be commensurate with the budgeted fee. The program format is influenced by the professional's approach. The program curriculum is not intended to contain only proprietary content; it may also include external resources.
- 1.12. Our PDF does not include working hyperlinks for the reference material. Can you please provide?
Sustainable Building Video Series - [Sustainable Buildings | Department of General Services | Commonwealth of Pennsylvania](#) [OPP's LEED Policy Guide \(2019\)](#) - [Microsoft PowerPoint - PSU LEED V4 Policy 2019 Update v 1.0.pptx](#) [Sustainable Design Guidelines - 01 80 00 PERFORMANCE REQUIREMENTS - OPP Design and Construction Standards - Confluence](#)
- 1.13. Please verify the which document (1s or 1p) and which version of 1s and 1p agreements you would prefer to use for this process and/or provide copies or links to them? The RFP lists 1-S as a requirement in the first paragraph and lists both options under the fee proposal guidelines.
Services will be carried out under the [Owner's 1-S Agreement](#).
- 1.14. We seek clarity around the educational components of this project. Are we creating curriculum/educational tracks for students or another audience, and if so, who? What is your preferred deliverable for this program? Will the educational component include (or be) a video in the Sustainable Building Video Series?
The audience is intended to be but not limited to government entities with capital programs like those of PA DGS. The educational program is expected to be commensurate with the budgeted fee and is influenced by the professional's approach. Video production is not anticipated.
- 1.15. We seek clarity around the expectations of the working relationships anticipated in this project. How does the OPP and PSS hope to work with the consultant? Can you define what you envision as collaboration with interns and clarify who is directly overseeing their work? What is the anticipated level of engagement with OPP/PSS leadership, staff, vs interns and how much time will each group provide the project?
The DGS Sustainability Building Guidelines project is funded through a state grant. PSS will administer the grant, OPP Design and Construction (D&C) will provide project management assistance, and the professional's work will be carried out under the OPP D&C 1-S Agreement. The level of collaboration and engagement of project team members is influenced by the professional's approach.
- 1.16. Are you open to extending the submission date to accommodate the US Holiday?
Yes. In consideration of the US Holiday, the proposal submission deadline has been extended from 12pm Monday, December 2, 2024, to 5pm Wednesday, December 4, 2024.
- 1.17. Will you require in-person monthly meetings?

Monthly in-person meetings are not required. However, an in-person meeting in Harrisburg to kick-off the project is recommended, with additional in-person meetings as needed by the professional to facilitate the development of the guidelines with the team.

- 1.18. Please clarify the role and management of the noted interns. Will they report to the consultant team?
See response to 1.15 above.
- 1.19. Will you require specific recording location, presenters, or recording system for educational videos?
See response to 1.3 above.
- 1.20. Please list the typologies of buildings addressed or included within the sustainable buildings guidelines. For example, will industrial facilities be included?
See response to 1.9 above.
- 1.21. The format requested in the RFP on page 3 is “two (2) single-sided A3’s” but on page 4 (title Fee Proposal Guidelines for A/E Agreements) we are also asked to present our fee proposal “on company letterhead.” As our letterhead is a standard 8.5”x11” format, how should we proceed in reconciling these requests?
Please include the company name, logo, address and contact information necessary to establish your company’s identity on the A3’s.
- 1.22. The RFP indicates our proposal should include “the PSU Project Number” but there does not appear to be a number assigned. Can you please clarify?
The project number has not been assigned yet. If you are chosen to provide these services, we will add the assigned project number.
- 1.23. The RFP states that the initial budget is approximately \$70k including soft costs and reimbursables, and a preliminary project timeline is provided, broken out by project tasks. Should we provide a Fee Proposal as part of our response to this RFP? If so, should the Fee Proposal be a separate document, or should it be included as part of the two (2) single-sided A3s? If it is to be a separate document, is there a preferred format (e.g. PDF, 8-1/2”x11”)?
A fee proposal should be provided as a part of the response to this RFP. It should be included as part of the two (2) single-sided A3s. Please see the Fee Proposal Guidelines for additional information.

END OF ADDENDUM

This addendum shall become part of the RFP and **MUST** be returned with the Proposal.

RESPONDER _____

NAME: _____

SIGNATURE: _____

TITLE: _____

DATE: _____

Note: This form does not count toward the maximum pdf proposal pages permitted. It is a separate document and should be submitted as an 8-1/2”x11” PDF.