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# **OREGON STATE UNIVERSITY**

## **REQUEST FOR QUALIFICATIONS**

**#197601**

### **OSU-Cascades Campus Expansion:** **Energy Systems Feasibility Analysis, Preliminary** **Design & Phasing Strategies**

ISSUE DATE: January 22, 2019

RFQ CLOSING (DUE) DATE: February 1, 2019, 2:00 PM, Pacific Time

NO LATE SOLICITATION RESPONSES WILL BE ACCEPTED

**CONTRACT ADMINISTRATOR:**

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**APPEALS:**

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**OSU Cascades Energy Feasibility Study Analysis, Preliminary Design and Phasing Strategies****1.0 Introduction:**

Oregon State University is seeking qualification statements (“Solicitation Responses”) from integrated design teams (“Offerors”) for the feasibility analysis and preliminary design of campus energy systems to be located at OSU-Cascades (OSU-C) in Bend, Oregon (“Project”). Offerors may sub-contract as necessary to ensure a complete design team.

Scope of services will include the following phases for the development of the campus energy systems: feasibility analysis of conceptual plans, preliminary design, construction documents for selected elements, and phasing plan. Additionally, some support, in the form of graphic exhibits, models and text, may be required for an on-going public outreach program being conducted by the university.

**2.0 Project Description:**

Oregon State University intends to construct a 128-acre campus in Bend, Oregon, including the onsite energy systems, through multiple phases, to serve 5,000 students by the year 2034.

Key components of the Project include the following:

1. Feasibility analysis of conceptual energy systems, layouts and phasing in the Long Range Development Plan (LRDP).
2. Planning analysis and financial strategy for solar installation with a focus on phasing/timing of installation based on LRDP phases and projected availability of solar-ready space.
3. Analysis of geothermal options, including but not limited to: (1) Geo-exchange/ground source, (2) open loop water source using groundwater, and (3) open loop water source using river water.
4. Schematic design of the selected geothermal option, except if the selected option is geo-exchange/ground source, in which case the first phase of underground geo-exchange loops need to be designed up to construction drawings and specifications to enable immediate installation during an earthwork project scheduled for Spring 2019-Spring 2020.
5. Programmatic and schematic design of the Central Utility Plant (CUP), utilizing the selected geothermal option and either natural gas or biomass. The University is currently evaluating biomass as an energy source and plans to make a decision in early 2019. If biomass is selected as an energy source, Wisewood Energy (previously selected biomass consultant), will provide input for the biomass elements of the CUP schematic design. The CUP may also include some research, teaching and administrative space, in the base program or an alternate.
6. Preliminary design (30%) and cost estimates for electrical distribution infrastructure for two scenarios: (1) with a micro grid for the campus and (2) without a micro grid.
7. Phasing plan for energy system installation.

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In 2013, the Oregon Legislature allocated the first phase of capital to build an Oregon State University campus in Bend, to expand to a four-year university offering a range of undergraduate and graduate degrees. The first OSU-C building opened in fall 2016 on a 10-acre site adjacent to a former pumice mine (now owned by the university) and a former construction demolition landfill. Through long range development planning and master planning processes over the last few years, the university has evaluated both the pumice mine and landfill for future campus development and expansion to accommodate up to 5,000 students by 2034. In April 2018, after significant planning and remediation/redevelopment investigations, the university acquired the former Deschutes County Demolition Landfill, a brownfield site, for remediation and redevelopment for future use as the university campus.

The OSU-C Master Plan includes campus expansion from the existing 10-acre campus, to a 128-acre campus by 2034, through numerous phases. These phases include varying amounts of infrastructure and building construction, requiring a deliberate energy systems phasing plan.

In addition to academic spaces, student and middle market housing, a central utility plant, recreation areas and student success centers, the OSU-C LRDP includes an innovation district that is a figurative handshake between academic-led instruction and research and industry-led innovation. At the same time, this home to world-class research and study will blend seamlessly with neighboring communities. Remediation and redevelopment of the landfill will provide the space for this university-industry innovation district.

OSU-C has set a goal to become a net zero energy campus, where the actual annual delivered energy is less than or equal to the on-site renewable exported energy. The LRDP proposed several coordinated approaches to energy management and supply (see LRDP, p. 94), including:

- Highly efficient, climate-responsive buildings with building design standards that include high-performance envelopes, operable windows, efficient equipment, and plug load management to minimize heating and cooling demand
- Geo-exchange system for thermal energy, providing heating and cooling where necessary and appropriate.
- Central utility plant with boilers fueled by either natural gas or biomass to supplement the thermal energy supplied by the geo-exchange system.
- Photovoltaic panels both on building roofs and racks on the ground to provide renewable electrical energy.

The LRDP also includes conceptual water, wastewater and storm water system plans and ideas, with a focus on reducing the demand for potable water. While the university plans to be connected to the City of Bend's water and sewer systems, innovative systems will be designed and implemented to drive down potable water demand, while also reducing discharge of sewage effluent into the municipal sewer. To the extent that a wastewater

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treatment facility could be used for heat/energy recovery, the energy systems design team may coordinate with the wastewater design team.

The current campus includes an academic building, a residence hall, a dining hall and a science education center. The academic building is currently solar-ready.

Several studies have been conducted related to the energy systems, and are available as resources for this project, including:

- Long Range Development Plan (LRDP), Page |SERA, March 2018
- Biomass Energy for the OSU-Cascades Campus, Wisewood, May 2017
- Updated Energy Analysis and Phasing, Wisewood, April 2018
- Geo-Exchange Loop Phasing Capacity, Cost Summary and Comparisons PAE, August 2017
- OSU-Cascades - Net Zero Campus Recommendations (presentation), PAE, February 2017.
- Biomass Energy for the OSU-Cascades Campus (presentation), Wisewood, May 2017.

Key goals of the Project include:

1. Validate (or dispute) and refine energy system assumptions of LRDP and previous studies.
2. Develop a comprehensive plan to enable the university to meet its goal to be net zero energy at time of full buildout. This plan shall consider the overall campus expansion project, including the landfill remediation and pumice mine reclamation processes, as well as master plan phasing and infrastructure Contracts with the City of Bend.
3. Select a strategy and design for geo-thermal energy system(s).
4. Schematic design of Central Utility Plant to enable informed discussions with potential partners for financing, construction, operations and maintenance.
5. Delivery of a phasing schedule for installation of energy systems that considers the campus expansion phasing plans, as well as financial strategies/incentives for the timing of installation of energy sources. Specific focus on when solar should be installed on site, balancing construction phasing, quantity of available space at various phases, and financing strategies.
6. Consideration of innovative financing strategies for all approaches.

### 3.0 Energy Efficiency:

The state of Oregon requires OSU (and OSU-C) to design new construction to be LEED silver equivalent and must meet the state building code for energy efficiency. In addition, OSU-C stated goal is to build a campus that is net zero for energy at full buildout. The planning and design work through the resulting Contract shall be conducted with this focus.

### 4.0 Design and Construction Timeline

Design work will commence upon selection of the design team and Contract execution. The

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method of delivery for construction has not been decided by OSU at the time of this RFQ but may consider construction manager/general contractor (“CM/GC”), design build, or another delivery method including, but not limited to public-private partnerships. Work may be phased using multiple contracts over a number of years.

**5.0 Project Funding**

Currently, OSU has funding for a portion of this long-term energy system. The intention of this RFQ and resulting Contract is conceptual planning or schematic design of the future OSU-C campus energy systems and detailed design on the currently funded portion.

**6.0 Selection Process:**

This Request for Qualifications (RFQ) selection process will be conducted pursuant to the terms of this RFQ and OSU Standards. Once the Solicitation Responses have been reviewed and scored, the top three (3) to five (5) firms will be invited participate in on-site interviews.

**7.0 Compensation:**

Compensation will be based on a total “not-to-exceed” amount for services and reimbursable expenses, with “not-to-exceed” maximums for the following individual phases: feasibility analysis of conceptual plans, preliminary design, some final design, and phasing plan. Cost estimating may be required in one or more phases. The amount of compensation will be negotiated with the Offeror who has submitted the best qualifications (the Apparent Successful Offeror). **No cost proposal or price information is to be submitted with Solicitation Responses.**

**8.0 Evaluation Criteria:**

Indicate in writing the following information about your firm’s ability and desire to perform this work. Solicitation Responses will be rated based upon the weight assigned to each item as noted in the parenthesis at the end of each statement below.

- 8.1.1 Provide a brief description of your firm and the focus of the practice. List the projects your firm is currently contracted for and at what stage the projects are in terms of completion. Also, include your firm’s total dollar volume for each of the last five years. (Weight: 5)
- 8.1.2 Describe your team’s experience with geothermal design. Indicate your firm’s breadth of experience across geothermal approaches (ground/soil source, groundwater source, and river water source). (Weight: 15)
- 8.1.3 Describe your team’s experience with central utility plant design, utilizing both natural gas and/or biomass. (Weight: 15)
- 8.1.4 Describe your team’s experience with solar energy facility design and phasing for institutions of similar size to OSU-C. (Weight: 15)

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- 8.1.5 Identify key personnel, including project designer and project manager along with those of sub-consultants proposed to be assigned to this project. Include proposed key personnel's project experience, with specific examples and identify their roles in the projects. Indicate current availability, proposed percentage of project involvement per project phase and indicate whether the proposed team has worked together on previous projects. Highlight the individuals who participated in the project examples. (Weight: 20)
- 8.1.6 Describe your firm's experience designing integrated energy systems, with a particular emphasis on net zero energy systems and innovative strategies. Provide specific examples of integrated energy systems for long-term sustainability (structural, environmental and financial). Include information about any creative strategies employed toward sustainability measures, phasing and financing. (Weight: 20)
- 8.1.7 Describe your firm's experience understanding, accommodating and prioritizing needs and requirements of students, staff and visitors with disabilities. (Weight: 5)
- 8.1.8 Provide a description and identification of Minority Business Enterprise (MBE), Women Business Enterprise (WBE), Emerging Small Business (ESB), or Disabled Service Veterans (DSV) certifications for your firm and a description of your nondiscrimination practices. Provide historical information on MBE, WBE, ESB, or DSV Joint Ventures, subcontracting or mentoring plan, and utilization history for projects completed by your firm within the past three (3) years.
- Provide a narrative description of your current workforce diversity program/plan, and the plan for obtaining subcontracting, consulting, and supplier diversity for this Project. Include a description of the outreach program or plan, including a schedule of events and specific steps that will be taken to maximize broad based and inclusive participation and the plan to provide mentoring, technical or other business development services to subcontractors needing or requesting such services.
- The selected firm will provide the services with respect to diversity according to the means and methods described in the workforce plan described in the Solicitation Response, unless changes are requested and approved in writing in advance by OSU or are required by applicable laws, ordinances, codes, regulations, rules or standards. (Weight: 10)

**9.0 References:**

In addition to responding to the evaluation criteria above, provide the names, addresses and phone numbers of three owners, three sub-consultants, and three contractors to be used as references for this project. Verify that the individuals identified have had direct contact with the referenced project, and the phone number is current. Do not include references from any firms or individuals included in your design team for this Project or any OSU personnel. OSU may check with these references and with other references associated with past work

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of your firm.

### 10.0 Selection Procedure and Timetable:

The selection procedure described below will be used to evaluate the capabilities of Offerors to provide the professional services to OSU for this project.

January 22, 2019	Issue RFQ
January 24, 2019	Optional information session --Via phone/web conference
February 1, 2019	Solicitation Response due 2:00 PM, Pacific Time
February 8, 2019	Notification of finalists
February 22, 2019	Interviews with Selection Committee
February 25, 2019	Estimated Notice of Intent to Award
March 11, 2019	Estimated Contract Execution

Site Visit: No mandatory site visits are required as part of the selection process, however, an optional pre-Solicitation Response information session will be held on January 24, 2019 at 1:00 PM, local time via phone/web conference. Offerors who wish to participate must request the web conference information from the **Contract Administrator** listed in this document no later than **two hours** prior to the meeting time. Finalists invited to participate in interviews will be provided an opportunity for a site visit at that time. No other site visit will be offered.

### 11.0 Evaluation Process:

This RFQ is the first step in a two-step process in the selection of the integrated design team. The Solicitation Responses to this RFQ will be evaluated by the selection committee, which will be comprised of university personnel who score Solicitation Responses and rank finalists and another group of university personnel who serve as advisors but do not score Solicitation Responses or rank finalists. On the basis of this evaluation, the selection committee will make its best efforts to limit the field of finalists to at least three (3), but not more than five (5), finalists to be selected for final consideration through interviews of each finalist and further investigation of references. OSU will utilize this RFQ process to obtain information to enable selection of the most qualified Offeror through evaluation of:

- a. The Offerors' Solicitation Responses to evaluation criteria in section 8 of this document;
- b. Information obtained during an interview of the Offerors by the selection committee; and
- c. The results of discussions with the Offerors' references and others.

Each criterion in the first step of the evaluation process has been assigned a weight between five (5) and twenty (20). Each member of the evaluation committee will rate each firm in each



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criterion between one (1) and five (5) (five being the highest), and multiply that number by the weight assigned to the criterion. The evaluation committee members will then total the weighted score from all of the criteria to obtain the total score. The result of this total score will be used to rank all Offerors. The top ranked three (3) to five (5) Offerors will be invited to participate in on-site interviews.

The evaluation committee will meet and compare the individual evaluation committee member rankings. The committee will discuss firm strengths and weaknesses and the individual evaluation committee member scorings. The evaluation committee discussion will result in the consolidated ranking from which the finalists for interviews will be selected for step two of the process.

The Solicitation Responses will be used in preparation for interviews of the finalists.

After all of the interviews are completed, the evaluation committee will discuss the strengths and weaknesses of the interviewed finalists. The committee will then rank the interviewed finalists in order of preference based on all information received, presented and heard during the interviews. The finalist that has the highest overall ranking will be deemed the Apparent Successful Offeror. Final ranking will be based on finalist's Solicitation Response to questions during the interview stage, and through that Solicitation Response, how well each finalist can meet the Project and University needs.

Interviews will include a sixty (60)-minute presentation period, immediately followed by a separate thirty (30)-minute Q&A session. Finalists should be prepared to address the following:

- Your firm's philosophy and practiced approach to a design that will result in innovative and effective energy systems, with a focus on supporting the university's net zero energy goal.
- Specific challenges you anticipate for this project based on past project experiences and "lessons learned" from previous projects that you will incorporate to keep the project moving forward.
- Discuss the level of thermal conductivity of local soils (and in particular, pumice), and how this influences design of a geo-exchange system.
- OSU will be remediating a landfill and reclaiming a pumice mine in phases as part of the campus development and energy systems construction. What considerations should the university take into account related to this phased development strategy?
- OSU anticipates and welcomes public review and scrutiny as the campus design moves forward. How would you present the energy systems design to the public with a focus on the university's sustainability goals?
- Innovative financing strategies will be employed for the campus expansion, possibly including the energy systems. How does your team collaborate with finance strategy experts and what creative finance strategies should the university evaluate?

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If, during the discussion, the selection committee determines the interviewed finalists are too close to rank, the university has no recent experience working with a finalist, or if the consolidated ranking indicates a tie, the committee will check the references provided by the Offeror as required by this RFQ. Information obtained from references may alter the committee's final ranking of finalists. Any alteration of final ranking will be based on committee's understanding of how well each firm can meet the needs of the Project and University.

OSU will then negotiate with the Apparent Successful Offeror *the price and specific statement of work* consistent with either OSU's Standard Architect's Agreement or OSU's Standard Consultant's Agreement ("Sample Contracts"), both of which are attached to this RFQ. The choice of Contract form will depend on the negotiated statement of work and will be at OSU's sole discretion. If OSU and the Apparent Successful Offeror are unable to reach an agreement, OSU will negotiate with the second-ranked Offeror, etc. The Sample Contracts may contain certain notes or alternative provisions. Those alternative provisions will be included at the sole discretion of OSU.

**12.0 Responsibility Evaluation:**

OSU reserves the right to investigate each Offeror's responsibility pursuant to OSU Standards, and will consider information obtained from any source as part of its evaluation, at any time prior to execution of a Contract. Submission of a Signed Solicitation Response constitutes the Offeror's approval for OSU to obtain any information OSU deems necessary to conduct the evaluation including, but not limited to, credit reports and information discovered during reference checks.

Financial Information: OSU will notify Offerors, in writing, of any financial documentation required, which may include recent profit-and-loss history; current balance statements; assets-to-liabilities ratio, including number and amount of secured versus unsecured creditor claims; availability of short and long-term financing; bonding capacity and credit information.

OSU may postpone the Award or execution of a Contract in order to complete its investigation and evaluation. Failure to promptly provide complete information requested will render the Solicitation Response nonresponsive. Failure of an Offeror to demonstrate responsibility will render it non-responsible and constitute grounds for Solicitation Response rejection.

**13.0 Submission:**

Submit **one (1)** hard copy versions of your written Solicitation Response, along **with one (1) electronic version on a thumb drive** to be received by the closing date and time listed in this document to the **Contract Administrator** as stated in this RFQ.

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Your Solicitation Response must be contained in a document **not to exceed twenty-five (25) single sided pages**, including pictures, charts, graphs, tables and text the Offeror deems appropriate to be part of the review of the Offeror's Solicitation Response. Resumes of key individuals proposed to be involved in this project are exempted from the twenty-five (25) page limit and should be **appended to the end of your Solicitation Response**. No supplemental information to the twenty-five (25) page Solicitation Response will be allowed. Appended resumes of the proposed key individuals, along with a transmittal letter, table of contents, front and back covers, and blank section/numerical dividers, etc., will not be counted in the twenty-five (25) page limit.

Information should **be presented in the same order as the above evaluation criteria**. The **electronic Solicitation Response should be sized appropriately for transfer (under 8 MB)**. The written Solicitation Response should be submitted in a **soft-bound** (comb or spiral, spiral preferred – no three-ring binders) format with page size of **8 ½ x 11 inches** with no fold-outs. The basic text information of the Solicitation Response should be presented in standard business font size, and reasonable margins.

**Your Solicitation Response must be Signed by an officer of your firm with the authority to commit the firm and contain contact information including email for communication purposes.**

OSU may reject any Solicitation Response not in compliance with all prescribed public bidding procedures and requirements, and may cancel this solicitation or reject for good cause all Solicitation Responses upon a written finding by OSU that it is in the best interest of OSU to do so.

Note that OSU will not accept Solicitation Responses or queries that require OSU to pay the cost of production or delivery.

OSU is an AA/EEO employer.

**Telephone, facsimile, or electronically transmitted Solicitation Responses will not be accepted.**

**Solicitation Responses received after the closing date and time will not be considered.**

**14.0 Questions:**

All questions and contacts with the OSU regarding any information in this RFQ must be addressed in writing, fax or email to the **Contract Administrator** stated in this RFQ no later than January 28, 2019, at 5:00 PM, Pacific Time.

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15.0 Solicitation Revisions:

Offerors may submit a written request for clarification or change of particular solicitation provisions and Specifications and or Contract terms and conditions (including comments on any Specifications or terms that you believe limits competition) to Hanna Emerson, Construction Contracts Manager, at the address stated above or email at [hanna.emerson@oregonstate.edu](mailto:hanna.emerson@oregonstate.edu) . Such requests for change shall be received no later than January 28, 2019 at 5:00 PM, Pacific Time. Such requests for change shall state the reasons for the request and any proposed changes to the solicitation provisions, Specifications and or Contract terms and conditions.

16.0 Change or Modification:

Any change or modification to the Specifications or the procurement process will be in the form of an Addendum to the RFQ and will be made available to all Offerors by publication on the OSU Business and Bid Opportunities (<http://bid.oregonstate.edu/>) website. It is the responsibility of each Offeror to visit the website and download any Addenda to this RFQ. No information received in any other manner different than as described herein shall serve to change the RFQ in any way, regardless of the source of the information. Any request for clarification or change of anything contained in an addendum not received by the date and time stated in the addendum will not be considered.

17.0 Appeals:

Appeals shall be pursuant to OSU Standards. Any Offeror to this RFQ who claims to have been adversely affected or aggrieved by the Contract Award of a competing Offeror will have seven Days after issuance of the notice of intent to Award to deliver a written appeal of the Contract Award to Hanna Emerson, Construction Contract Manager at the address given in the RFQ. Any such appeal must be received by Ms. Emerson no later than seven Days after the Contract Award has been made. Pursuant to OSU Standard, any appeal must be clearly marked as an appeal and identify the Solicitation, Contract and Award at issue.

18.0 Proprietary Information:

OSU will retain this RFQ, one copy of each Solicitation Response received and an electronic copy of each Solicitation Response received, together with copies of all documents pertaining to the Award of a Contract. These documents will be made a part of a file or record, which will be open to public inspection after OSU has announced its intent to Award a Contract. If a Solicitation Response contains any information that you consider to be a trade secret under ORS 192.345(2), you must mark each trade secret with the following legend: **"This data constitutes a trade secret under ORS 192.345(2), and must not be disclosed except in accordance with the Oregon Public Records Law, ORS Chapter 192."**

The Oregon Public Records Law exempts from disclosure only bona fide trade secrets, and

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the exemption from disclosure applies only "unless the public interest requires disclosure in the particular instance."

Therefore, non-disclosure of documents or any portion of a document submitted as part of a Solicitation Response may depend upon official or judicial determination made pursuant to the Public Records Law.

In order to facilitate public inspection of the non-confidential portion of the Solicitation Response, material designated as confidential must accompany the Solicitation Response, but must be readily separable from it. Prices, makes, model or catalog numbers of items offered, scheduled delivery dates, and terms of payment will be publicly available regardless of any designation to the contrary. Any Solicitation Response marked as a trade secret in its entirety will be considered non-responsive and shall be rejected.

**19.0 Project Termination:**

OSU is seeking to Award a Contract (either an Architect's Agreement or a Consultant Agreement, depending on negotiated statement of work) to a firm for feasibility analysis of conceptual plans, preliminary design, some final design, and phasing plan; however, OSU reserves the right to terminate the Project and the Contract, at any phase in the project.

**20.0 Insurance Provisions:**

During the term of the resulting Contract, the successful Offeror will be required to maintain in full force, at its own expense, from insurance companies authorized to transact the business of insurance in the state of Oregon, each insurance coverage/policy as set forth in the Contract.

**21.0 Additional Requirements:**

By submitting a Solicitation Response, the Offeror certifies that the Offeror has not discriminated against Minority, Women or Emerging Small Business Enterprises in obtaining any required subcontracts.

Offerors are hereby notified that policies applicable to consultants and contractors have been adopted by OSU that prohibit sexual harassment and that Offerors and their employees are required to adhere to OSU's policy prohibiting sexual harassment in their interactions with members of OSU's community.

**Enclosures:**

OSU Sample Architect's Agreement

OSU Sample Consulting Agreement

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References:

OSU-Cascades Long Range Development Plan:

[https://osucascades.edu/sites/osucascades.edu/files/osu-cascades\\_lrdp\\_report.pdf](https://osucascades.edu/sites/osucascades.edu/files/osu-cascades_lrdp_report.pdf)

Biomass Energy for the OSU-Cascades Campus, Wisewood, May 2017

Updated Energy Analysis and Phasing, Wisewood, April 2018

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End of RFQ