



Oregon State University

REQUEST FOR PROPOSAL (RFP) #2025-016860

CORVALLIS DECARBONIZATION PLAN DEVELOPMENT

ISSUE DATE: October 17, 2024

NON-MANDATORY PRE-PROPOSAL CONFERENCE:
October, 25 at 10:00 AM Pacific Time (PT) via Zoom

RFP DUE DATE/TIME:
November 15, 2024 at 3:00 PM Pacific Time (PT) via
electronic submission to bids@oregonstate.edu

QUESTION DEADLINE: November 6, 2024 at 5:00 PM Pacific Time (PT)

PROJECT NUMBER: 2577-25C

CONTRACT ADMINISTRATOR:

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APPEALS:

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It is the Proposer's responsibility to continue to monitor the [OSU Business and Bid Opportunities](#) website for Addenda. Failure to acknowledge any Addenda in the Transmittal Letter may cause your Proposal to be considered non-responsive.

OSU standards and policies govern this solicitation ([Procurement Thresholds and Methods, Procurement Solicitations and Contracts](#)) unless otherwise referenced or stated.

1.0 INTRODUCTION

1.1 Oregon State University (“OSU” and/or “Owner”) is conducting a competitive **ONE OR TWO-STEP** Request for Proposals (RFP) process to retain ONE (1) firm to provide Decarbonization Plan Development for its Corvallis campus (*the “Project”*).

OSU WILL ONLY BE ACCEPTING SEALED PROPOSALS ELECTRONICALLY - Proposals are to be submitted to bids@oregonstate.edu by the Due Date/Time.

NON-MANDATORY PRE-PROPOSAL CONFERENCE- A virtual Non-Mandatory Pre-Proposal Conference will be held on 10:00 AM PT on October 25, 2024 via Zoom. Firms wishing to attend shall e-mail constructioncontracts@oregonstate.edu no later than 15 minutes in advance to receive the Zoom link. The email subject line should contain the Solicitation Number/Name and Firm Name.

All questions shall be submitted via e-mail to constructioncontracts@oregonstate.edu by the Question Deadline in order to be addressed. The email subject line should contain the Solicitation Number/Name and Firm Name.

1.2 Background. Oregon State University in Corvallis, Oregon is located within the traditional homelands of the Mary's River or Ampinefu Band of Kalapuya. Following the Willamette Valley Treaty of 1855 (Kalapuya etc. Treaty), Kalapuya people were forcibly removed to reservations in Western Oregon. Today, living descendants of these people are a part of the Confederated Tribes of Grand Ronde Community of Oregon (<https://www.grandronde.org>) and the Confederated Tribes of the Siletz Indians (<https://ctsi.nsn.us>).

Founded in 1868 as Oregon’s land grant institution, OSU serves the state, the nation and the world as a premier 21st-century research university. OSU is committed to exceptional research, discovery, innovation and engagement — and to integrating its research and engagement mission with the delivery of a high-quality, globally relevant and affordable education for the people of Oregon and beyond. OSU is one of only two land, sea, space and sun grant universities in the U.S. and is the only university in Oregon to have earned both Carnegie Classifications for Very High Research Activity and Community Engagement.

The university’s 570-acre main campus is located in the city of Corvallis, a vibrant college town of nearly 58,000 in the heart of Western Oregon’s Willamette Valley. Corvallis consistently ranks among the safest, most highly educated and greenest small cities in the nation.

This solicitation is to procure an engineering or architectural firm, or similarly qualified firm, to provide engineering consulting services, as described in this solicitation, to develop a Decarbonization Plan to address the Corvallis campus’ phased decarbonization of the campus utility and energy infrastructure. The plan shall be developed in close coordination with other planning work being done to address the University’s deferred maintenance backlog through renewal of campus buildings.

1.3 Location. Buildings across OSU’s Corvallis campus. The selected firm will aid OSU in determining which buildings/areas to focus on.

1.4 Summary of Work.

The Plan will address and consider the following goals:

1. Reduce university operating costs and carbon emissions significantly and permanently, as outlined in the OSU Path to Carbon Neutrality, which calls for decarbonizing Corvallis campus district energy systems.
2. Serve future heating and cooling loads as envisioned in the Corvallis Campus Vision, 10 Year Capital Forecast, Capital Renewal Program and other planning efforts. Serve building heating and cooling loads for select existing buildings as they undergo mechanical upgrades and renovations.
3. Assess recoverable heat from research and other buildings, informing changes needed to those buildings to fit long term planning and decarbonization goals.
4. Maintain a level of service worthy of a high intensity research institution and reduce operating and maintenance burden, where possible.

Project Objectives

1. Zone the campus into utility districts based on opportunities unique to each geographic area of the campus. Create recommendations for phasing each district and for phasing steps, as needed, within each district. Utility district planning will include piping plans, heat sources, load estimates and consideration of electrical service capacity.
2. Align with OSU Capital Improvement and Renewal plan and principles in the OSU Path to Carbon Neutrality.
3. Incorporate opportunities for resiliency, and not be solely dependent on one energy source for heating, cooling, and electricity.
 - a. Assist OSU in assessment of electrical infrastructure needed to support long term Plan, and include flex points within the Plan that respond to electrical distribution limitations.
4. Focus on energy sharing and re-use opportunities within and across districts.
5. Identify state and federal funding opportunities for OSU's decarbonization projects

QUALIFICATIONS

The selected firm ("team") must have the demonstrated capability in engineering, project and construction planning to provide a broad range of services. Minimum qualifications to be considered include, but are not limited to:

1. At least five years of relevant experience, which should include some combination of the following:
 - Experience generating scopes of work for project approvals and funding opportunities;
 - Experience in estimating energy, utility and infrastructure projects to be constructed over a period of 2 to approximately 20 years;
 - Experience with construction sequencing and planning;
 - Project experience in district energy utility planning services;

PROJECT AND DELIVERABLES

The selected firm or team shall develop a decarbonization plan for addressing short-, mid-, and long-term goals to address the Corvallis campus phased decarbonization of the campus utility and energy

infrastructure. A particular area of focus will be on refining OSU's existing strategies into a workable plan with potential scenarios, projects, actions, and their projected costs. Further, the selected firm will provide guidance on eligible federal and state funding, and any other grant funding opportunities.

The selected firm will advise on and coordinate with the university regarding how to optimize the Decarbonization Plan with respect to the existing plants, tunnel system, and other campus nuances. Learning from existing infrastructure and building systems, understanding how buildings and campus utilities are linked, and carefully considering logistics and ongoing operations will all be critical to determine appropriate boundaries for demolition and replacement of selected buildings and utilities.

The Decarbonization Plan work is expected to include a review of existing documentation, including:

- 2021 Corvallis Campus Vision
- 2022 OSU Path to Carbon Neutrality
- 2024 Housing & Dining Vision
- Ten Year Business Forecast and Ten Year Capital Forecast
- OSU Historic Preservation Plan
- Capital Renewal Plan
- OSU Transportation Plan

This work will primarily focus on OSU's energy infrastructure but will need to consider potential impacts to adjacent buildings, infrastructure, access, parking, and open space.

1.5 Scope of Services.

The following Scope of Work outlines the proposed phases of work the Consultant will take to prepare, draft, and submit the Plan. The Consultant is encouraged to expand on or recommend adjustments to align with the stated goals in this RFQ and OSU Path to Carbon Neutrality. The scope of work can be broken down into the following phases:

- I. Baseline Assessment
- II. Project Identification and Prioritization
- III. Implementation Plan Development and Adoption.

I. Baseline Assessment

This phase shall include review of existing documentation, project plans and campus site visits to build on the work already completed and not repeat previous efforts. The selected Consultant will be expected to develop and document a comprehensive understanding of existing and proposed OSU infrastructure, operations, current and future energy needs, and gaps.

- Review existing strategy documents, projects and plans, including for three existing and one conceptual district utility plants (See RFQ Exhibits)
- Attend site visits of existing plants, energy distribution infrastructure and selected buildings, focusing on heat recovery opportunities.
- Learn, guide and communicate relevant project information through stakeholder engagement as required by OSU project team.

- Phase I deliverable: present findings to OSU project team via a Phase I. summary report and presentation by 3 months following contract execution.

II. Project Identification and Prioritization

OSU has begun some work toward the goals stated above. During this project phase, the Consultant will confirm or recommend adjustments to OSU's approach and evaluate future project elements and opportunities for further definition.

- Identify locations for future district utility plants and determine to what buildings they provide heating and/or chilled water.
 - Include piping plan that identifies barriers and ROM costs to providing heating and/or chilled water to buildings. In dialogue with OSU, identify facilities that cannot reasonably be served by these district systems.
- Estimate recoverable heat from applicable sources including lab buildings, and suggest other possible carbon-free heat sources to assess, then conduct that assessment.
 - Include assessment of Corvallis campus fume hoods (listed in Exhibit 7), and potential to concentrate fume hood infrastructure into fewer buildings to achieve maintenance and cost savings, and improve heat recover opportunities.
- To transition university buildings to lower temperature heating water, work with OSU to create a list of buildings that identifies barriers, opportunities and costs for the transition.
- Evaluate the need for thermal storage, including the possible sizes and location of storage facilities.
- Recommend options to modernize the medium voltage electrical distribution system on the Corvallis campus.
- Recommend changes to current and future operation of OSU's Energy Center to align with the Decarbonization Plan.
- Phase II deliverables: draft documents addressing the above bulleted items (including maps, recoverable heat locations list/map, project lists, etc.). The Phase II deliverable is due 9 months following contract execution.

For each opportunity, the Consultant shall be expected to tie assessment data completed in Phase I, develop a list of potential projects, provide different alternatives and scenarios, and note potential risk and cost impacts.

III. Implementation Plan Development and Adoption

Based on the work of the previous phases, the Consultant will develop an Implementation Plan in an interactive and collaborative process with the university. The Plan will include specific projects to be further defined, funded, and executed over the next 5-20 years. The selected firm will work closely with OSU to ensure that energy renewal and building renewal programs are implemented efficiently, maximize value while minimizing rework, duplication, or conflicts. These documents will inform the 10 Year Capital Forecast and other significant investments. The Consultant will also provide guidance on eligible federal and state funding opportunities and other incentives.

Phase III and final deliverable: the Consultant is expected to compile and present the findings, feedback, and data into a final plan that represents an actionable plan tied to the OSU Path to

Carbon Neutrality and 10 Year Capital Forecast. The final draft of the Decarbonization Plan shall be presented to OSU stakeholders and leadership for final adoption prior to February 27, 2026.

1.6 Reserved

1.7 Design Standards. The design of the Project must follow [OSU's Design Standards](#), including OSU's requirements for sustainable development.

2.0 SCHEDULE

Issue Date	10/17/2024
Non-Mandatory Pre-Proposal Conference	10/25/2024 at 10:00 AM PT via Zoom
Question Deadline	11/6/2024 at 5:00 PM PT
Final Addendum Issuance (if necessary)	By 11/8/2024
Proposal Due Date/Time	11/15/2024 at 3:00 PM PT

The following dates are tentative and subject to change without notice:

Estimated notification of finalists (If Applicable)	Week of November 25 th , 2024
Presentations/Interviews (If applicable)	Week of December 2, 2024
Notice of Intent to Award	By December 6 th , 2024
Estimated Contract execution	By December 20 th , 2024
Estimated Notice to Proceed	By December 20, 2024

OSU will make every effort to adhere to the above schedule. It is however, subject to change.

3.0 QUESTIONS, SOLICITATION REVISION REQUESTS, CHANGE OR MODIFICATION, APPEALS

3.1 Questions.

3.1.1 All questions and contacts with OSU regarding any information in this RFP must be addressed in writing via email to constructioncontracts@oregonstate.edu no later than the **Question Deadline** as stated in Section 2.0. If a Proposer is unclear about *any* information contained in this document or its exhibits (Project, scope, etc.), they are urged to submit those questions for formal clarification.

3.2 Solicitation Process Revision Requests.

3.2.1 Proposers may submit a written request for change of particular solicitation process provisions to the **Chief Procurement Officer** at the address or email listed in this document. Such requests for change shall be received no later than the **Question Deadline** listed above.

3.2.2 Such requests for change shall include the reasons for the request and any proposed changes to the solicitation process provisions.

3.3 Change or Modification.

3.3.1 Any change or modification provided by the Owner for this RFP or the documents included as exhibits to this RFP shall be made by a duly issued Addendum made available to all firms on the [OSU Business and Bid Opportunities](#) website. It is the responsibility of each Proposer to visit the website and download any addenda. No information received in any manner different than as described herein shall serve to change the RFP in any way, regardless of the source of the information.

3.3.2 OSU will not be responsible for any other explanation or interpretation of this RFP or the documents included as exhibits to this RFP.

3.4. Appeals.

3.4.1 Appeals related to the OSU solicitation process and award decisions and actions shall be pursuant to OSU Standards ([Procurement Thresholds and Methods, Procurement Solicitations and Contracts](#)). All written appeals must be delivered to the **Chief Procurement Officer**, at the address given in this RFP.

4.0 PUBLIC RECORD

4.1 OSU will retain an electronic copy of this RFP and one electronic copy of each Proposal received, together with electronic copies of all documents pertaining to the award of a contract. These documents will be made a part of a file or record, which shall be open to public inspection after OSU has announced its intent to award a contract. If a Proposal contains any information that is considered 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 shall not be disclosed except in accordance with the Oregon Public Records Law, ORS Chapter 192.”**

4.2 The Oregon Public Records Law exempts from disclosure only bona fide trade secrets, and the exemption from disclosure applies only “unless the public interest requires disclosure in the particular instance.”

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

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

5.0 FORM OF AGREEMENT

A Sample CONSULTANT AGREEMENT is included as an exhibit and contains contract terms and conditions applicable to the work. The sample contract may contain certain notes or alternative provisions. Those alternative provisions will be included at the sole discretion of OSU.

6.0 RESERVED

7.0 INSTRUCTIONS TO OFFERORS

7.1 Summary of Work. The Work contemplated in this document shall be for OSU in connection with the Project described in Section 1.0 of this document.

7.2 Pre-Proposal Conference and Site Visit.

7.2.1 The Pre-Proposal Conference will be administered virtually via Zoom. Proposers ***must*** contact the **Contract Administrator** to request virtual Conference access. This request must occur no later than fifteen (15) minutes prior to the meeting time, as stated in this RFP.

7.2.2 No statement made by any officer, agent, or employee of OSU in relation to the physical conditions pertaining to the Work site will be binding on OSU, unless included in writing in the documents included as exhibits to this RFP or an Addendum.

7.2.3 Date and Time of a Pre-Proposal Conference is located on the cover sheet of this RFP.

7.3 Proposal Submission.

7.3.1 Submit **one (1) electronic version via email** to be received by the Due Date/Time listed in this document to bids@oregonstate.edu as stated in this RFP. **Electronic versions must be sized appropriately for transfer (under 10 mb).**

7.3.2 All Proposals must be received by OSU before the Due Date/Time. OSU's official clock shall prevail in any time conflict. Any Proposal received after the Due Date/Time will be rejected and will be retained and made part of OSU's archive records in accordance with OSU Standards.

7.4 Proposal Submission Requirements.

7.4.1 Your Proposal must be contained in a document not to exceed Twenty (20) single sided pages including pictures, charts, graphs, tables and text you deem appropriate to be part of OSU's review of your Proposal. Resumes of key individuals proposed to be involved in this Project are exempted from the page limit and must be appended to the end of your Proposal. No supplemental information to the page limit will be allowed. Appended resumes of the proposed key individuals, along with a Transmittal letter, table of contents, front and back covers, references, exceptions and blank section dividers will not be counted in the page limit.

7.4.2 Your Proposal must follow the format outlined below and include a **Transmittal/Cover Letter signed by an officer of your firm(s) with the authority to commit the firm(s) and must also acknowledge receipt of all addenda. *Include an email address for communication purposes.***

7.4.3 Any/all exceptions to the Terms and Conditions included in the Sample Contract shall be clearly identified and appended to the Proposal in order to be considered by OSU during the negotiation period.

7.4.4 The electronic Proposal should be **should be sized appropriately for transfer (under 10 MB)** and formatted with page size of **8 ½ x 11 inches** with no fold-outs (except for any large format documents required by evaluation criteria). The basic text information of the Proposal should be presented in standard business font size, and reasonable margins.

7.4.5 OSU may reject any Proposal not in compliance with all applicable OSU solicitation procedures and requirements, and may cancel this solicitation or reject for good cause, all Proposals upon a finding by OSU that it is in the public interest to do so.

7.4.6 Note that throughout this procurement process, OSU will not accept Proposals that require OSU to pay the cost of production or delivery.

7.4.7 Telephone and facsimile transmitted **Proposals will not be accepted**. Proposals received *after* the Due Date/Time **will not be considered**.

7.4.8 Each Proposal shall be emailed to bids@oregonstate.edu. Proposals must be received by the date/time and in the format specified herein. The email line should contain the Solicitation Number/Name and Firm Name. Only those Proposals received at this email address by the Proposal Due Date/Time shall be considered responsive. Proposals submitted directly to the **Contract Administrator** will NOT be considered responsive. It is highly recommended that the Proposer confirms receipt of the email with the **Contract Administrator or designee**. The **Contract Administrator** or designee may open the email to confirm receipt but will NOT verify the integrity of the attachment(s), answer questions related to the content of the Proposal, or address the overall responsiveness of the Proposal.

7.5 Acceptance or Rejection of Solicitation Responses by OSU.

7.5.1 The procedures for Contract awards shall be in compliance with the provisions of OSU standards and policies adopted by OSU.

7.5.2 OSU reserves the right to reject any or all Proposals and to waive minor informalities in compliance with the provisions of OSU standards and policies adopted by OSU.

7.6 Withdrawal of Solicitation Response.

7.6.1 At any time prior to the Due Date/Time, a Proposer may withdraw its Proposal in accordance with OSU Standards. This will not preclude the submission of another Proposal by such Proposer prior to the Due Date/Time.

7.6.2 After the Due Date/Time, Proposers are prohibited from withdrawing their Proposal, except as provided by OSU Standards.

7.7 Evaluation Process.

The written response to this RFP is the first in a **potential** two-step process in the selection of a firm for this Project. The Proposals received in response to this RFP will be evaluated by a selection committee and if an award is not made after step one, the top scoring firms will be invited to advance to further evaluation steps including Presentations/Interviews and/or other processes as determined by the committee.

If conducted, Presentations/Interviews will include a **Twenty (20) minute** presentation period, immediately followed by a separate **Thirty (30) minute** Q&A session.

After all of the Presentations/Interviews are completed, the members of the selection committee will discuss the strengths and weaknesses of the finalists. The members of the selection committee will then score the finalists based on all information received, presented and heard during the Presentations/Interviews. Optional Reference Checks may also be undertaken to aid in final scoring. Upon completion of final scoring, negotiations may commence with all Proposers submitting responsive proposals or all Proposers in the competitive threshold.

Final scoring of the Interviews will be **separate and not cumulative** from the short-listing.

7.8 Evaluation Criteria. The following items constitute the evaluation criteria for the selection committee to score Proposals. For ease in reviewing, provide tabs keyed to each of the following criteria:

7.8.1 Experience on Similar Projects (25 points)

Provide three (3) or more examples of your past work and relevant experience on projects with similar scope and size in a campus or public agency environment. Examples should include experience and relevant work products such as large-scale planning and programming, complex problem solving, policy development, heavily regulated subjects, and/or energy recapitalization/transformation projects. Given that the core work of effort is plan development, examples of completed projects should focus on how those projects were planned and on the experience from those projects that would inform this planning work, as opposed to a focus on the execution of those projects.

Example projects should, at a minimum, include the following:

- Project Name and Description
 - Client Name and Contact
 - Project timeframe (start and finish)
 - Project Size, scope and intent (goals; cost; metrics such as square footage, BTU's, megawatts, linear feet of piping, utilities addressed, etc.)
 - Relevant and correlative deliverables (i.e., why those examples?)
- A. Discuss your firm's experience and expertise in analyzing and assessing the risks involved (financial, labor, regulatory, etc.) in planning and transforming energy infrastructure.

- B. Please correlate the experience of your team on similar planning projects in identifying and mitigating future risks during implementation. What risk identification and mitigation methods have you employed on past projects that could be useful to OSU?
- C. Please highlight any key personnel who worked on the example project(s) who are being proposed for this project and their role and responsibilities.
- D. Please discuss how your firm/team's experience and work on similar projects enables you to provide the most value and most useful work product for OSU. What makes your firm/team stand out from other experienced teams?
- E. Demonstrate your ability to accurately forecast energy savings and life cycle costing for energy and utility projects.

Be sure to Include information on how your firm meets the minimum qualification noted in Section 1.4.1:

- **At least five years of relevant experience, which should include some combination of the following:**
 - **Experience generating scopes of work for project approvals and funding opportunities.**
 - **Experience in estimating energy, utility and infrastructure projects to be constructed over a period of 2 to approximately 20 years.**
 - **Experience with construction sequencing and planning.**
 - **Project experience in district energy utility planning services.**

7.8.2 Key Personnel (25 Points)

- A. Please describe your firm/team members' general qualifications to perform the Scope of Work.
- B. Detail your staff's knowledge of maintenance and operations of district energy systems along with their knowledge of utility incentive plans, Oregon state and federal funding opportunities.
- C. Please include an organizational chart of key personnel of your team and describe how you will organize and assign roles and responsibilities. The org chart shall be accompanied by a narrative summary indicating the duties, the functional responsibilities, and the designated authority of each individual on the chart. Include a relative percent involvement you expect each team member to have and designate a lead for day-to-day communication/main contact.
- D. In the Appendix, include copies of resumes for proposed key personnel, maximum of one page per person.
- E. Identify any of the required expertise, services, or support tasks that you intend to subcontract, if any. If you are proposing a combined team (multiple firms or experts as a team), please discuss how your team will work together to deliver comprehensive and complimentary deliverables. Please note, teaming is not mandatory but is encouraged if necessary to provide the required core team skills and expertise and deliver a better product.

7.8.3 Management Plan & Proposed Approach (40 Points)

- A. Please provide a detailed narrative of your approach to the Project. Confirm your understanding of the objectives, outcomes, deliverable needs and how your proposal will address each in collaborative and integrated approach. Please address how your approach will interface with existing university plans.
- B. Provide a preliminary Project Work Plan with your initial thoughts on tasks, timeframes, etc.
- C. Discuss how your firm/team will organize the work to create the most value for the university. Provide hourly rate sheet for key personnel as well as anticipated number of hours they expect to spend on the project.

7.8.5 Workforce Diversity Plan (15 Points)

A. 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 team 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.

B. 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/subconsultants needing or requesting such services.

The Proposer must perform the Work according to the means and methods described in the workforce plan described in its Proposal, unless changes are requested and approved in writing in advance by OSU or are required by applicable laws, ordinances, codes, regulations, rules or standards.

7.8.6 FEE PROPOSAL (20 Points)

Provide a **FEE PROPOSAL** on a time and materials cost reimbursement basis up to a maximum not-to-exceed amount. Please clearly identify the amount for Basic Services and a Reimbursable Expenses allowance.

Please include a breakdown of the costs including a listing of the types of personnel participating in the work, an estimate of their hours and rates charged for their services based on the proposed scope listed in Section 1.0.

Provide hourly rates for all personnel who may perform work on this project.

IMPORTANT: Hourly rates will not be scored but MUST be provided.

Scoring will be based solely on the total maximum not-to-exceed amount.

NOTE: Formula for scoring Fee Points will be as follows: Lowest Fee for each of the price

related items will receive full points with higher cost price related items receiving proportionally lower points according to this formula: **(Low Fee or Fee%/ Fee or Fee%) x Points Available**

7.9 Point Summary Table.

Criteria	Point Value
Experience on Similar Projects	25 Points
Key Personnel	25 Points
Management Plan	40 Points
Workforce Diversity Plan	15 Points
Fee Proposal	20 Points

7.10 (Optional) Presentations/Interview

7.10.1

Presentations/Interviews (50 Points)

Presentations/Interviews **may** be conducted to aid in determining the Apparent Successful Proposer. Proprietary Discussions may also be conducted with all finalists prior to Presentations/Interviews. Information regarding the Proprietary Discussions and Presentations/Interviews will be provided to the short-listed firms following the initial review and scoring. Final scoring of the Presentations/Interviews will be **separate and not cumulative** from the short-listing.

7.10.2 Optional Reference Checks (10 Points).

With your initial proposal be sure to provide the names, addresses, phone numbers and e-mail addresses of three (3) references. Do not include references from any firms or individuals included in your consulting team for this Proposal or any OSU personnel. OSU **may** check with these references and with other references associated with past work of your firm.

7.11 Equity Contracting. OSU will require the successful Proposer to comply with OSU Standards, policies, rules and procedures requiring good faith efforts in subcontracting with minority, women, emerging small business or service-disabled veteran owned business enterprises.

7.12 Negotiations.

7.12.1 OSU may commence General and/or Best and Final Offer (BAFO) Negotiations in accordance with OSU Standards ([Procurement Thresholds and Methods, Procurement Solicitations and Contracts](#)) following final scoring under either a one or two-step process.

7.12.2 Any/all exceptions to the Term and Conditions included in the Sample Contract/Agreement shall be clearly identified and appended to the Proposal in order to be considered by OSU during the negotiation period.

7.12.3 OSU reserves the right to deny contract term negotiations with the Apparent

Successful Proposer if such contract terms were not received by OSU in the Solicitation response pursuant to Section **7.12.2** above.

7.12.4 OSU reserves the right to defer decision(s) on requests for contract terms and conditions revisions until after a notice of intent to award is published.

7.12.5 If OSU and the Apparent Successful Proposer are unable to reach agreement on contract terms and conditions, OSU may cease negotiations with the Apparent Successful Proposer and enter negotiations with the next highest scoring Proposer, etc.

8.0 MISCELLANEOUS

8.1 Financial Responsibility.

8.1.1 OSU reserves the right to investigate, at any time prior to execution of the contract, the Proposers financial responsibility to perform the anticipated services. Submission of a Proposal will constitute approval for OSU to obtain any credit report information OSU deems necessary to conduct the evaluation. OSU will notify Proposers, in writing, of any other documentation required, which may include, but need not be limited to: 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. Failure to promptly provide this information may result in rejection of the Proposal.

8.1.2 OSU may postpone the selection of finalists or execution of a contract in order to complete its investigation and evaluation. Failure of a firm to demonstrate financial responsibility may render it non-responsible and constitute grounds for Proposal rejection.

8.2 Project Termination.

8.2.1 OSU reserves the right to terminate the Project or contract during any phase in the Project.

8.3 Insurance Provisions. During the term of the resulting contract, the awardee 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.

8.4 Nondiscrimination. By submission of a Proposal, the Proposer certifies under penalty of perjury that the Proposer will not discriminate against minority, women, emerging small business or service-disabled veteran owned business enterprises in obtaining any required subcontracts.

8.5 AA/EEO Employer. OSU is an AA/EEO employer.

8.6 Compliance with Applicable Law. Proposer agrees to comply with all federal, state, county, and local laws, ordinances, and regulations as well as all applicable OSU Standards and Policies while on campus.

8.6.1 Smoke and Tobacco Free Campus. Owner’s grounds and premises are smoke and tobacco free. Contractor and Contractor’s employees, agents, Subcontractors, if any, agree not to smoke or use tobacco products while on Owner property.

8.6.2 Sexual Misconduct Policy. OSU has policies that prohibit sexual misconduct against members of the university community and in keeping with those policies Contractor and Contractor’s employees, agents, and Subcontractors are prohibited from engaging in sexual misconduct against members of the university community.

8.6.3 Firearms Policy. The Owner has adopted a policy that prohibits Contractor and Contractor’s employees, agents and Subcontractors from possessing firearms on Owner’s property.

8.7 RESERVED

8.8 Execution of Agreement.

8.8.1 The Proposer shall be required to execute the Contract as provided, within any time period provided in an award notification. The Contract Documents shall be delivered to OSU in the manner stated in an award notification.

8.8.2 Work/Services Commencement. Work/Services shall not commence until execution of a Contract and subsequent issuance of a notice to proceed letter with the selected Proposer.

8.9 Reserved

9.0 EXHIBITS

Exhibit 1 – [Corvallis Campus Vision](#)

Exhibit 2 – Sample Consultant Agreement

Exhibit 3 – [OSU Path to Carbon Neutrality](#)

Exhibit 4 – Ten-Year Capital Forecast, which is part of the [Ten-Year Business Forecast](#)

Exhibit 5 – [Ten-Year Capital Forecast Process](#)

Exhibit 6 – [OSU Historic Preservation Plan](#)

Exhibit 7 – Campus Fume Hood List

Exhibit 8 – [OSU Transportation Plan](#)

END OF RFP