



Procurement and Contracting Services

Request for Proposals to Produce a Comprehensive, Institutional Sustainability and Climate Action Plan

Addendum #2

**Please mark all proposal submission
Files with the following information**

Sealed RFP # S052207

Revised to: Due on August 2, 2022 no later than 2:00 PM MST

This addendum is issued to answer questions received prior to the July 8th deadline.

1. Is the University able to share the high-level recommendations from the 12-week climate action planning engagement from Fall 2021 mentioned in Section 5.2.5?
 - a. The 12-week pro bono climate action planning engagement provided the University with a limited cost of business-as-usual and other financial forecasts, as well as a high-level climate action roadmap which included:
 2. Expansion of our strategic energy management practices and our existing Utility Modification Revolving Fund;
 3. Expansion of renewable energy purchasing and infrastructure to cover Scope 2 emissions, beyond Main Campus;
 4. A recommendation to obtain further technical analyses to advance a campus infrastructure transition from natural gas-powered steam and high-temperature hot water, to an electric-powered low-temperature hot water system;
 5. Recommendations to implement Scope 3 emission mitigation strategies including commuter and air traveler initiatives, electrification, offsets, optimized waste management, etc.
 - b. Given the short time frame for this valuable pro bono engagement, it was high-level and not able to address the full scope of our climate and sustainability goals and commitments. We would be happy to talk in more depth about any findings to the selected vendor.
2. Section 5.3.6 suggests the University is open to vendor suggestions and recommendations for website, webtool, and dashboard development, but also says that the website for the Action Plan is expected to occur in-house. How much latitude is there to create an original website with an external vendor?
 - a. Limited latitude – we are open to suggestions and recommendations regarding web interfaces and design, but all website creations for the University of Arizona are done in-house by University staff. Vendors will be welcome and encouraged to assist with content and graphics development for any future Action Plan-related webpage, website, or webtools.
 - b. If the vendor is able to provide a strong example of a dashboard or interface that can be integrated into a University website, all of which use Drupal, and has garnered success for previous projects, we are open to hearing about this and discussing it further.
3. Is there a page limit or format required for our response?
 - a. Page limit guidance: None
 - b. Format guidance: no specific format is required. We just ask applicants to try to align with the sections as laid out in the RFP, when possible. The format of the proposal is otherwise up to the discretion of the applicant.
4. What information is needed from the references?
 - a. Name, title, company/affiliation, email address, project worked on together - with dates and duration of project. See example below.
 - b. For example: John Smith, Chief Sustainability Officer at University of Maryland, johnsmith@umaryland.edu. EcoGroup Consulting worked with Mr. Smith on the University of Maryland Sustainability and Resilience Plan, May 2015 - January 2017.

5. It is apparent in the RFQ that there is an emphasis on the synthesis of existing planning documents and materials with significant stakeholder engagement through a social justice lens. Please describe the level of technical expertise the University envisions, i.e., can you describe the depth of new engineering work expected?

The depth of new engineering work is expected to be minimal, with the primary focus being on identifying which engineering work is required, and in what order, to achieve goals identified during the course of this planning process. We expect follow-up, deeper engineering efforts to stem from this process but are also not opposed to specific proposals that really only have one clear path (e.g. water balance).

6. Can you please provide links or documents explaining your interpretation of "Just Transition" to ensure we have the same understanding of this approach?

We are aligning with the definition of a Just Transition as laid out by the Climate Justice Alliance. The following resources are ones that we have found most helpful in applying these concepts to a higher education context:

- <https://www.colorado.edu/jtc/just-transition>
- <https://www.farmtoinstitution.org/blog/institutions-mobilize-for-a-just-transition>
- <https://www.haverford.edu/vcam-center-arts-and-humanities-environmental-studies/news/educating-just-ecological-transition>

7. The description of the "Prioritization Guide" is somewhat vague. Can you provide any additional detail, including how the Prioritization Guide will be used and the intended audience?

We were intentionally vague here to see how and what vendors might propose. Our goal for the Prioritization Guide is to generate a succinct, high-level overview of all major initiatives proposed in the Action Plan, with a corresponding list of resources required and anticipated impact, that we can provide to University senior decision makers. Such a guide would enable our leadership to more easily see how they could allocate resources/talent to best support immediate implementation of the Plan with relative ease. We encourage ideas from vendors and are open to suggestions and novel frameworks.

8. Can you tell us who you envision will be included on the Core Team?

- Office of Sustainability Director & Sustainability Program Manager
- Co-Chair yet to be determined (faculty or staff member)
- Working Group Leads (Built Environment; Academics, Curriculum, & Research; Contracting, Investments, & Procurement; Engagement & Campus Life; Planning & Administration)
- The Organizational Structure in Section 5.6 lists Topical Area Leads, however, their involvement at the Core Team level will be minimal to none.

9. Can you list any shared governance organizations that should be taken into consideration when outlining our proposal?

The Shared Governance organizations that we are planning to keep apprised of the Action Plan and its progress are the Strategic Planning & Budget Advisory Committee (SPBAC),

Faculty Senate, UArizona Staff Council, and to lesser extents, the Associated Students of the University of Arizona (ASUA - undergraduate student government) and the Graduate & Professional Student Council (GPSC - graduate student government). We also plan to keep the Academic Deans' Council in the loop, though the organization is not a Shared Governance organization.

10. What level of logistical support will the University provide for virtual meetings? (i.e. technical staff, audio, and video equipment.)

The University will provide all means of virtual and hybrid meeting support, including all necessary audio and video equipment and technical assistance/support. The primary building where meetings will take place was constructed with strong hybrid meeting capabilities in mind. We will work closely with the building's technical support staff and building manager to ensure all technology is working as expected well in advance of all major meetings.

Certain activities that require specialized equipment or staffing may require support beyond what our teams are able to provide and will be evaluated separately if proposed.

11. Does section 4.45.2.4 apply if we are not providing IT services or software, accessing a UA database, storing data with any associated identity information, or storing any confidential information?

This section does not apply to this RFP.

12. Section 3.5.6 requires pricing "in the appropriate spaces and/or areas provided in this RFP." We do not see such a space or area provided. Is there a form that we are missing? If not, where should the fee matrix be provided in the order of the RFP response?

This is standard boilerplate language in our RFP document. For this RFP, the pricing can be submitted under section 5.3.7 or as a separate section in your response.

13. Section 3.7.5 lists qualifications information which may be requested, but there is no request in the rest of the RFP text. Can this material, including firm resources, and resumes be provided under 3.7.5? If not in this location, is there a preferred sequence in which the University would like to review this material?

Yes, please include this information in your response labeled as 3.7.5.

14. Can the five references be provided on project sheets with the requested Contact Information as well as a list of team members, the project dates, and other information about how this experience is relevant to your project?

This is an acceptable manner in which vendors may provide the requested reference information.

15. 3.5.10 Proposal Organization states that the proposal should be numbered and ordered based on the RFP and cross referenced to Section 5. This seems to apply to addressing 'Project Understanding, Approach & Work Plans'. The Evaluation Criteria (listed after 3.7.8 on pg 11) lists several other criteria, but there is no other numbered section asking for information on Experience, or Team, or specifying where the Fee Proposal or Value Add Requests should be located. Should this material be placed in Section 3 after 3.7.8? If not in

this location, is there a preferred sequence in which the University would like to review this material?

Information concerning Vendor Experience, Proposed Personnel, etc. and the Fee Proposal should be listed after all subsections given in Section 5.0.

16. 3.5.10 says the proposal should be in a format "readily incorporated into a contract." Will a PDF be considered an acceptable format?

Yes, a PDF is considered an acceptable format.

17. Is there a maximum file size that may be uploaded as an RFP response?

There is no maximum file size.

18. Can you please provide one or two examples of inclusive stakeholder engagement strategies that have worked well in university planning processes?

The University is open to hearing new ideas pertaining to stakeholder engagement. In the past, few of the strategies employed have seemed particularly effective while also being inclusive, so we have a desire for strategies and insight at that intersection for this process.

We have observed during environmental/sustainability stakeholder convening activities in the past, that the audience tends to fall roughly into two categories. The first category includes members of the campus community and public who do not have much background knowledge in sustainability topics but who have interest, passion, and/or questions. The second category tends to include "experts" who are already working in the sustainability arena and have significant education and/or experience. There is, of course, a third category as well, which includes community members who are not in the audience, either because they have no strong interest and/or because these discussions have historically been inaccessible, resulting in underrepresentation. In our experience, factors such as event timing, location/venue, transportation, how and to whom events are advertised, can all have bearing. More than that, members of marginalized communities may not feel welcome or may feel that their contributions will not matter.

For general audiences, engagement activities that remove or reduce information barriers to entry are most effective. In other words, we'd like to not assume that general audiences have a baseline understanding of sustainability or climate topics. Participants need to be given all necessary information to effectively participate in an activity (e.g. they don't need to know anything about demand vs. supply side energy management, for example, scope emissions, or even why driving less or following a plant-based diet might be preferable for the planet). For audiences with more experience/education, it is important to lay out everything that has been done or considered to date, what worked and didn't work, and why, etc. to give them the information necessary to provide the most effective input.

Either way, we would prefer to avoid the common free-form, abstract, poster-based brainstorming sessions that tend to result in unrealistic, unhelpful, and often redundant ideas.

19. 5.0 Overview: Regarding cost-benefit analyses, what level of financial accuracy are you expecting, or which cost metrics will be important for decision-making (i.e., first costs, life-cycle costs, payback periods, etc.)? How important are financial models to the scope?

First costs are most important for decision-making, followed by consideration of payback periods. We recognize that life-cycle analyses and costs are of critical importance, but they are generally not as important of a consideration in decision-making at the University at the present time. Cost-benefit analyses do not need to be exact, particularly given the current market conditions, but should be within an order of magnitude. We do expect follow-up, deeper financial efforts for certain areas, specifically those related to major infrastructure investments, to stem from this process.

20. 5.0 Overview: Please confirm if the scope of the action plan should be limited to Greenhouse gas emissions and carbon foot printing or if we should anticipate assessing additional sustainability goals for categories such as, waste reduction, water conservation, healthy materials etcetera.

The scope of the Action Plan should address categories beyond greenhouse gases and carbon inventorying to take other variables into account, and offer a holistic Action Plan that touches on multiple sectors and proposes goals in those categories. Please refer to Section 5.6 of the RFP, which shows our draft organizational structure for this process. The Working Groups and Topical Areas we have identified span a myriad of subject areas, including the built environment, academics, procurement, investments, campus life and administration. We expect that the Plan will allow us to “move the needle” at least to some degree on climate mitigation and broader sustainability efforts in all of those areas.

21. 5.3.1 Planning Horizon: Can you provide more substance on expectations for the expanded global scope from 2030 to 2035 or 2040? Is this an action item as part of the Sustainability & Climate Action Plan, or are there specific activities that should be included as part of this proposal?

This first Action Plan effort is primarily addressing our Main Campus and some peripheral properties’ operations and functionalities. We expect the next version of the Action Plan will go beyond Main Campus to look at satellite, subsidiary, and global campuses, taking the whole of the University’s activities and related carbon and sustainability footprints into account. For this effort, our data set is not sufficiently robust at present to expand beyond this scope. This first planning endeavor will help us identify what metrics we need to be aggregating and/or tracking at the broader global level. We also look forward to developing a sustainability advisory body on Main Campus as part of this inaugural effort, which can guide and shape the next generation of holistic, global action plans, in addition to stewarding the implementation of this Action Plan.

22. 5.3.2 Develop the Sustainability & Climate Action Plan: Is there any pre-work on the Action Plan that needs to be developed prior to stakeholder engagement, so as to direct and guide its content?

Yes, it would be valuable to craft a thoughtful, targeted “ask” of stakeholders so that the scope of the engagement activities (e.g. town hall meetings, community charettes, etc.) is narrow enough to allow us to glean more specific input, rather than just hosting wide-scale brainstorming sessions without boundaries. In the past, stakeholders have provided great ideas when invited to environmental visioning meetings; however, many of those ideas had already been considered, implemented partially or fully, or were, unfortunately, infeasible from the get-go due to budgetary or other constraints. So, we envision conducting preliminary work prior to making contact with general stakeholders, to ensure that the engagement is of optimal value to both the stakeholders and the planners.

23. 5.3.4 Facilitate Stakeholder Engagement: For the request to “create a large-scale sustainability literacy survey, developed in partnership with University faculty and staff.” We would like to understand the following:

a. Who will be participating in the survey?

We expect to launch the survey to the entire campus community (students, faculty, staff, designated campus colleagues, etc.), with an anticipated participation rate of 2-10% based on previous surveys conducted at this level.

b. Who will be administering the survey?

The survey is expected to be shared via the Office of the President in concert with the Office of Sustainability. In terms of survey development, we will consult with relevant faculty on campus to co-develop and “vet” the survey prior to its distribution.

c. Will the survey utilize the University’s own survey platform, or will the consultant deploy and manage the survey?

The University has full access to Qualtrics and numerous other survey tools that we would prefer to use; however, we are open to using other survey platforms if there is clear value provided that cannot be met with the existing platform options. If we use Qualtrics or a related survey platform, we expect to co-manage the survey.

d. Who will be analyzing the data from the survey?

We anticipate that the relevant faculty who support the co-development of the survey will also provide limited analysis of the collected data, alongside the final vendor.

e. When in the timeline do you see the survey taking place, and how would you like it to inform the Action Plan and communications strategies?

We would prefer the survey occur fairly early on in the Action Plan creation process to effectively tailor the primary foci of the Action Plan to the clearest, most realistic needs and desires of the campus, while also developing more effective behavior change strategies as early as possible. The survey results will be used to help inform Action Plan happenings such as town hall meetings and community charrettes.

24. 5.3.4 Facilitate Stakeholder Engagement: Can we assume that stakeholders will be determined in conjunction with the University through stakeholder workshop(s), where stakeholder groups and appropriate venues for engagement will be defined?

The majority of stakeholder groups have been pre-defined within Section 5.6 of the RFP. The Office of Sustainability and partnering University departments and administrators have also defined the vast majority of critical participants from within those groups. That said, it will still be critically important to broaden our engagement beyond these groups to ensure all voices are heard and all potential solutions are incorporated into the final Action Plan. In terms of venues for engagement, we have a lot of options both on campus and in the community to hopefully reach as many key participants as possible.

25. 5.3.4 Facilitate Stakeholder Engagement: Based on the organization chart provided in Section 5.6, can we assume that we will be carrying out separate charettes with each of the listed entities?

Due to the sheer number of Topical Areas within each Working Group that we have defined in Section 5.6, we currently expect charettes to happen at the Working Group level, encompassing each Topical Area within a given Working Group. Furthermore, we expect the vendor to only participate in two to three unique charettes for each Working Group, with follow-up discussions and charettes led by the University team to limit the number of meetings that require direct involvement by the vendor's team. All relevant content and information would then be shared by the Core Team with the vendor for discussion, analysis, consolidation, and inclusion within the Action Plan.

We would like to be mindful of vendor's time, and recognize that financial, DEI/AJ, and other elements may be taking up a portion of vendor's bandwidth on an ongoing basis. We would like to prioritize support from the vendor in the evaluation of initiatives rather than the "in-the-weeds" discussions around specific initiatives and their unique application to the University of Arizona.

26. 5.3.4 Facilitate Stakeholder Engagement: Are there any external, non-University special interest groups that we will be engaging with? Can you define the number of groups or workshops/charettes to be carried out with them at each stage?

We currently expect only one to two Tucson-community facing charrettes, which will be open to all interested members of the Tucson community. We do not anticipate engagement with specific special interests in a one-on-one fashion, although we have an interest in generally aligning with existing/developing sustainability goals and initiatives at the City of Tucson and Pima County.

27. 5.3.4 Facilitate Stakeholder Engagement: Can we assume that the "virtual, in-person, and hybrid planning charettes with all relevant stakeholders" (page 33) are different and separate from the "bi-monthly to quarterly community charettes" (page 34)?

These are not separate. The list of meetings and presentations provided on page 34 is a more detailed description of what we anticipate as part of "Plan, prepare, and co-convene virtual, in-person, and hybrid planning charrettes with all relevant stakeholders." To further clarify, we expect that just about all meetings will require a hybrid set-up to accommodate our pandemic-driven "new normal."

28. 5.3.4 Facilitate Stakeholder Engagement: Can we assume that the "bi-monthly to quarterly community charettes" (page 34) are intended for soliciting feedback on specific content in the Action Plan?

Yes. Please refer to the answer given in the question above: "5.3.2 Develop the Sustainability & Climate Action Plan: Is there any pre-work on the Action Plan that needs to be developed prior to stakeholder engagement, so as to direct and guide its content?"

29. 5.3.4 Facilitate Stakeholder Engagement: Can we assume that all workshops and planning charettes should be organized as hybrid activities (simultaneously in-person and virtual)?

Yes, all engagement activities should be organized as hybrid activities. The University will provide all means of virtual and hybrid meeting support, including all necessary audio and video equipment and technical support. The primary building where meetings will take place was constructed with strong hybrid meeting capabilities in mind. We will work closely with the building's technical support staff and building manager to ensure all technology is working as expected well in advance of all major meetings.

30. 5.3.6 Develop a Communications Strategy and Reporting Framework: Will it be required that the Action Plan and any communications and reporting frameworks stemming from it be in multiple languages? If so, what are the languages other than English that will be required?

At present, we expect that the Action Plan, all communications, and related reporting needs will be provided in English, with niche communications translations occurring in-house. However, we would be interested in seeing pricing for an option to translate the Action Plan and larger communications to Spanish.

31. 5.3.7 Financial Proposal: Can the University share the amount of funding available for this initiative?

The University has set aside funding to pursue this initiative and will consider a variety of proposals and a range of fees depending on the value provided by the vendor. We are unable to provide more information on the exact figure available at this time.

32. Proposal format:

- a. Is there a page limit or format required for our response?

There is no page limit for a given response. Additionally, no specific format is required, just try to align with the sections as laid out in the RFP, when possible. Format is otherwise up to the discretion of the vendor.

- b. What information is needed for the references? (Name, company, project details, phone/ email)

Name, title, company/affiliation, email address, project worked on together - with dates and duration of project

Example: John Smith, Chief Sustainability Officer at University of Maryland, johnsmith@umaryland.edu. EcoGroup Consulting worked with Mr. Smith on the University of Maryland Sustainability and Resilience Plan, May 2015 - January 2017.

All else remains the same.