Request for Proposal

GEC010507
Data Analysis for Energy Saving Opportunities

January 5, 2007

Issued by
George Cullen, C.P.M., VCO
Buyer Specialist
Facilities Management
Materials Division
Charlottesville, Virginia
Data Analysis for Energy Saving Opportunities
GEC010507
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This Request for Proposal (RFP) has been posted on the Facilities Management Materials Division web site for your convenience http://www.fm.virginia.edu/MaterialsDivision/RequestForProposals.aspx). Addenda and attachments are posted if issued. It is the firm’s responsibility to ensure that the entire RFP and related links, in its latest version, is reviewed prior to submittal of a proposal. We encourage you to check the web site frequently for any changes prior to the due date. To receive a hard copy of the RFP or addenda, please contact Linda Hunt, Office Manager, at (434) 982-5868 or email MatDiv@virginia.edu. For questions about the content of the RFP, contact the buyer listed in Section V, Information about this RFP. Additional information can be found on Procurement Services web site: http://www.procurement.virginia.edu/main/

The University of Virginia (University), seeks a qualified and experienced firm to provide data collection and analysis services to identify energy savings opportunities in University buildings and energy systems. The University operates a Building Automation System (BAS) that controls HVAC and energy system, and collects and stores data from meters and BAS points. A typical building will have numerous air handlers consisting of heating and cooling coils, humidifiers, fans, and VAV boxes. Data is collected in each of these devices and may include fan speed, pre and post coil temperature and humidity, and duct pressure. Temperature and humidity may also be monitored in individual rooms. Damper positions, air flows, and other data is also typically monitored and collected. Hot water and cooling water data is also collected in the buildings, as well as central systems (chillers, cooling towers, boilers, etc.) and may include water temperature, pressure, pump speed, and similar information. Metering data is also collected on steam, chilled water, hot water, and electricity for all buildings and central systems. In total, the building automation system includes more than 30,000 points. Two primary controls vendors currently provide services in conjunction with the BAS; these are Johnson Control and Wallace Day which uses the Automated Logic platform. Further information is provided in Attachment 5.

For ease of reference, each firm receiving this RFP is referred to as a "firm" and the firm selected to provide services for the University is referred to as the "Selected Firm." This RFP states the instructions for submitting proposals, the procedure and criteria by which a firm may be selected, and the contractual terms by which the University proposes to govern the relationship between it and the Selected Firm.

1. Background Information

When Thomas Jefferson founded the University in 1819, he intended it to be nothing less than a world-class institution of higher learning. Jefferson’s spirit lives on – not only in the Rotunda and Academical Village he designed, and which remain treasures of American architecture, but in the University’s standing as a leader in education, research, and community service.

The over 19,850 students attending the University work within a true meritocracy and live by an Honor Code unique among American universities. Each student is exposed to the widest spectrum of disciplines – from arts and athletics to humanities and technology. Our students also enjoy a unique connection to the world beyond college through the University’s outstanding professional training, exemplified by its nationally ranked schools of Law, Business, and Medicine. The University as a whole has had a consistently high ranking not only
among public schools, where it often heads the list, but also among all American universities, public and private.

Over 11,600 permanent University faculty and staff are committed to serving both the local and national community. The University makes a real difference in the world, through its invaluable research, a hospital ranked among the nation’s finest, and graduates who have consistently been among the forefront of our nation’s shapers. At the University, our bright future is the direct result of our great history.

II. Scope of Services
It is the University's intent to enter into an Agreement with the Selected Firm(s) for those services necessary to help the University achieve its goals as outlined in this RFP. The Selected Firm(s) will provide these services:

a. Provide all labor, supervision, travel, materials, tools, vehicles and equipment necessary to provide data evaluation services and periodic reports.

b. Estimated quantities of work to be done, equipment and material to be furnished under these specifications are approximate. The University does not assume any responsibility that final quantities will be comparable to the estimated quantities, nor shall the Successful Firm(s) plead misunderstanding or deception because of such estimate of quantities or of the character, location of the work, or other conditions pertaining thereto.

c. The work performed under the contract resulting from this RFP will be done on the Grounds of the University or designated state agency property in Charlottesville, Virginia.

d. Work performed will be done so as to not adversely affect the University's daily operations. Utilities will remain in working order at all times unless otherwise approved by the University's Contract Administrator.

e. All work will meet the standards specified in this, and all applicable local, state and federal standards.

f. When, in the opinion of the University, the quality of materials, equipment, and/or workmanship put in place by the Successful Firm(s) does not meet the specifications in this RFP or the contract arising from this RFP, the Successful Firm(s) will, at no additional cost to the University, immediately remove the nonconforming portion of the work and replace it with material, equipment, and/or workmanship which does meet specifications. When disputes arise concerning workmanship and/or material selected for work already accomplished, the Successful Firm(s) will, at no cost to the University, remove, replace, and/or rework the job so that compliance with the University's requirements are satisfied.

g. Report to the University’s designated representative all damages that result from the conduct of business; effect repairs within the University’s required time frame and no expense to the University.
h. Take responsibility for all employee conduct and for the safety of all persons and property. Comply with all regulations as adopted by the Safety Codes Commissions of the Commonwealth of Virginia, issued by the Department of Labor and Industry under Title 40.1 of the Code of Virginia.

i. The Successful Firm(s) will provide continuous service, as described in Attachment 5, Technical Specifications, during the term of the contract arising from this RFP. Changes in the terms, conditions, and prices of the renewable years shall be agreed to and accepted, in writing, by the University and the Successful Firm(s), sixty (60) days prior to the renewal period.

j. The University will establish a Contract Administrator to work with the Successful Firm(s). The Contract Administrator will be the only authorized person that the Successful Firm(s) shall deal with for purposes of this contract, unless the Contract Administrator designates other University personnel to assist in the administration of the contract.

k. The Successful Firm(s) will cooperate with the University concerning the scheduling of work, change of work, changed location(s) due to classes, testing, or special events, and/or the performance of additional work. The University's Contract Administrator will be notified prior to the blocking off or closing down of any portion of the University's buildings or Grounds. The Successful Firm(s) shall promptly notify the University's Contract Administrator if any change of work or any type of condition will prevent the Successful Firm(s) from meeting the requirements set forth by this RFP and the contract arising from this RFP. The University's Contract Administrator will evaluate such information and will provide guidance to the Successful Firm(s).

l. The Successful Firm(s) shall adhere to the regulations of the University's Department of Parking and Transportation. The Successful Firm(s) shall obtain the proper regulations and parking passes where needed to avoid parking violations. The Successful Bidder's vehicles and equipment shall be parked in designated area(s) at all times. The telephone number for Parking and Transportation is (434) 924-7231. The University charges a fee for parking permits.

m. The University will not be responsible for losses or damages of the Successful Firm(s) supplies, tools, and/or equipment. Damages caused by the Successful Firm(s) negligence or error shall be repaired by the Successful Firm(s) at no cost to the University. All equipment and materials used shall comply with all applicable codes and industry standards related to said equipment, materials and/or workmanship.

n. The University reserves the right to make minor changes to the contract arising from this RFP. Minor changes include, but are not limited to service: i.e. times, frequencies and sites, and equipment: i.e. sizes, sites and conditions. New or additional items may be added to this contract.

o. The Successful Firm(s) will provide adequate staffing and necessary work control procedures to include, but not be limited to, planning and scheduling of work and complete work requirements within the University's specified time limits to assure the performance of work in accordance with the terms of this RFP.
III. **Basis of Selection**

The University will evaluate proposals, and if a firm is to be selected, select the firm on the basis of:

a. The firm's plan to provide the University with the Services as described in Section II, Scope of Services;

b. The firm’s experience in providing Services similar to those described in this RFP, and the experience of the individuals which the firm proposes to provide such Services;

c. The firm’s references from clients that are comparable to the University;

d. The firm’s financial proposal;

e. The contractual terms which would govern the relationship between the University and the Selected Firm;

f. The firm’s plan for the utilization of Small, Women-owned and Minority-owned (SWAM) businesses. (In evaluating the firm’s proposal, the University will assign a minimum of 10 percent of the total selection weight to this individual selection criterion.); and

g. Any other factors relevant to the firm’s capacity and willingness to satisfy the University.

IV. **Contents of the Proposal**

Firms should provide this information:

a. **Services**
   
i. State the firm’s ability to provide the Services as described in Section II, Scope of Services. Provide a brief history of the firm and its experience, qualifications, and success in providing these Services.
   
ii. Describe the experience of the individual(s) who would be responsible for providing the Services to the University. The Successful Firm(s) will designate a representative who shall be thoroughly familiar with the terms and conditions of the contract arising from this RFP and have the authority to make decisions on behalf of the firm.
   
iii. Describe in detail how the firm plans to provide the services detailed in Section II, Scope of Services.
   
iv. Provide at least three references comparable to the University, including the name and telephone number of a contact person familiar with the firm.
   
v. Provide the name of the individual responsible for the firm’s supplier diversity program. This individual is responsible for implementing and reporting on the firm’s Small, Women-owned and Minority-owned (SWAM) program as it will relate to this procurement should the firm be selected.
b. Financial Proposal
   i. Describe the firm’s proposed fees for providing the Services.
   ii. Describe how the University will be charged.
   iii. All fees will include travel, truck charges and related expenses.
   iv. Describe how the University will benefit from cost savings by accepting the firm’s proposal.
   v. State the firm's capability for accepting electronic payments through Electronic Data Interchange (EDI) or Automated Clearing House (ACH) and any additional discounts that may result from paying electronically. Information about the Commonwealth of Virginia’s Financial Electronic Data Interchange (FEDI) program is available on this web site: http://www.doa.state.va.us/procedures/GeneralAccounting/EDI/edinew.htm

c. Contractual Arrangements
   i. State the firm’s acceptance of Attachment 1, Mandatory Contractual Provisions;
   ii. State the firm’s acceptance, with any proposed modifications, of Attachment 2, Preferred Contractual Provisions; and
   iii. Provide any contract the firm will request the University to sign.
   iv. Provide a written statement with the firm’s proposal that its principals or legal counsel has reviewed Attachment 1, Mandatory Contractual Provisions, and Attachment 2, Preferred Contractual Provisions, and Agrees that these provisions will become a part of any final agreement.

d. Virginia Freedom of Information Act
   Except as provided below, once an award is announced, all proposals submitted in response to this RFP will be open to the inspection of any interested person, firm or corporation, in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by firms as part of its proposal will not be subject to public disclosure under the Virginia Freedom of Information Act; however, the firm must invoke the protections of this section prior to or upon submission of its proposal, and must identify the specific data or other materials to be protected and state the reasons why protection is necessary. Firms may not request that its entire proposal be treated as proprietary information.

e. Small, Women-owned and Minority-owned (SWAM) Business
   Specify whether the firm is a SWAM. Firms can only be considered a Small, Women-owned or a Minority-owned Business Enterprise if certified by the Commonwealth of Virginia’s Department of Minority Business Enterprise (DMBE). All certified SWAM firms will be assigned a specific identification number. No SWAM firm is required to certify under this program and no SWAM firm will be excluded from doing business with the Commonwealth because of their failure to certify as a SWAM firm.

The Commonwealth’s definitions are:
   • Minority-owned Business Enterprise means a business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals.
   • Minority Individual means a person who is a citizen of the United States or a legal
resident alien and who satisfies one or more of the following definitions:

- "Asian Americans" means all persons having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands, including but not limited to Japan, China, Vietnam, Samoa, Laos, Cambodia, Taiwan, Northern Marinas, the Philippines, U. S. territory of the Pacific, India, Pakistan, Bangladesh and Sri Lanka and who are regarded as such by the community of which these persons claim to be a part.
- "African Americans" means all persons having origins in any of the original peoples of Africa and who are regarded as such by the community of which these persons claim to be a part.
- "Hispanic Americans" means all persons having origins in any of the Spanish speaking peoples of Mexico, South or Central America, or the Caribbean Islands or other Spanish or Portuguese cultures and who are regarded as such by the community of which these persons claim to be a part.
- "Native Americans" means all persons having origins in any of the original peoples of North America and who are regarded as such by the community of which these persons claim to be a part or who are recognized by a tribal organization.
- "Eskimos and Aleuts" means all persons having origins in any of the peoples of Northern Canada, Greenland, Alaska, and Eastern Siberia and who are regarded as such in the community of which these persons claim to be a part.

**Small Business Enterprise** means an independently owned and operated business which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of $10 million or less averaged over the previous three years. Nothing in this provision prevents a program, agency, institution or subdivision from complying with the qualification criteria of a specific state program or a federal guideline to be in compliance with a federal grant or program.

**Woman-owned Business Enterprise** means a business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals. If the firm is not a SWAM firm, describe the firm’s partnering relationships with SWAM firms and how it plans to support the University’s goal to increase business annually by 5% with these firms in accordance with Attachment 4, Executive VP and Chief Operating Officer’s Request for Commitment letter.

**V. Information about this RFP**

a. **Procurement Schedule**
   Here is a brief schedule for this procurement, specifying the important dates and milestones:
   - Issue Date of RFP: January 5, 2007
   - Preproposal Conference: January 18, 2007
   - Negotiations (week of): March 5, 2007 (tentative)
   - Contract Award (week of): March 5, 2007 (tentative)
b. The Issuing Office for this RFP is:
   University of Virginia
   Facilities Management
   Materials Division
   575 Alderman Road
   Charlottesville, Virginia 22903
   Attention: George Cullen, C.P.M., VCO
   Buyer Specialist
   Telephone: (434) 924-8720
   Fax: (434) 982-5077
   TDD: (434) 982-HEAR
   Email: gec2n@virginia.edu

   All proposals must be received at the University of Virginia, Facilities Management, Materials Division, 575 Alderman Road, Charlottesville, VA 22903 (physical location) or P.O. Box 400726 Charlottesville, VA 22904-4726 (mailing location) by 2:00 p.m., February 22, 2007. **Three (3) copies of each proposal must be provided.**

   Any questions concerning this RFP will be directed to the buyer as listed above and not to any other person at the University, with the exception of issues directly related to SWAM business and SWAM subcontracting opportunities. Such SWAM issues may be alternately directed to Bill Cooper, the University’s Director of Supplier Diversity, at (434) 924-7174 or wsc6ja@virginia.edu. The University will determine whether any addenda should be issued as a result of any questions raised or other matters raised.

c. Preproposal Conference
   An attendance optional conference for firms receiving this RFP will be held on Thursday, January 18, 2007 10:00 a.m. in Materials Division Conference Room, Charlottesville, Virginia (map viewed at this web site: [http://www.virginia.edu/Map/](http://www.virginia.edu/Map/)). Attendance at this conference is advised if your firm wishes to raise any questions in connection with this RFP. Please print a copy of the RFP and bring it with you, as no additional copies will be provided at the conference. The University intends to present general information which maybe helpful in the preparation of proposals and to offer firms the opportunity to ask questions concerning this RFP. No firm may have more than two representatives present at the conference. Firms planning to attend the Preproposal Conference should notify Linda Hunt either by email MatDiv@virginia.edu or telephone (434-982-5868), no later than 2:00 p.m. EST on Monday, January 15, 2007 of the names, titles, and phone numbers of the individuals who will attend.
Attachment 1
Mandatory Contractual Provisions

A. Nondiscrimination
During the performance of this Agreement, the Selected Firm will comply with the contract provisions contained in Section 2.2-4311 (1) & (2) of the Code of Virginia or any successor provisions which may be applicable to this Agreement. Also, in accordance with Section 2.2-4343.1, the University does not discriminate against faith-based organizations.

B. Conflict of Interests
The Selected Firm represents to the University that its entering into this Agreement with the University and its performance through its agents, officers and employees does not and will not involve, contribute to nor create a conflict of interest prohibited by the Virginia State and Local Government Conflict of Interests Act (Va. Code 2.2-3100 et seq), the Virginia Ethics In Public Contracting Act (Va. Code 2.2-4367 et seq), the Virginia Governmental Frauds Act (Va. Code 18.2-498.1 et seq) or any other applicable law or regulation.

C. Assignment
Neither party to this Agreement will have the right to assign this Agreement in whole or in part without the prior written consent of the other.

D. Amendments
No amendment of this Agreement will be effective unless it is reduced to writing and executed by the University's Director of Procurement Services and by the individual signing the Selected Firm's proposal or by other individuals named by either party as specified in Section E, Notices below. If the Selected Firm deviates from the terms of this Agreement without a written amendment, it does so at its own risk.

E. Notices
Any notice required or permitted to be given under this Agreement shall be in writing and shall be deemed duly given: (1) if delivered personally, when received; (2) if sent by recognized overnight courier service, on the date of the receipt provided by such courier service; (3) if sent by registered mail, postage prepaid, return receipt requested, on the date shown on the signed receipt; or (4) if sent by facsimile, when received (as verified by sender’s machine) if delivered no later than 4:00 p.m. (receiver’s time) on a business day or on the next business day if delivered (as verified by sender’s machine) after 4:00 p.m. (receiver’s time) on a business day or on a non-business day. All such notices shall be addressed to a party at such party’s address or facsimile number as shown below.

If to the University:
Eric N. Denby
Director of Procurement Services
University of Virginia
Carruthers Hall
1001 North Emmet Street
P. O. Box 400202
Charlottesville, Virginia 22904-4202
Fax: (434) 924-6154

If to the Selected Firm:
The person signing the Selected Firm's proposal in response to the University's RFP, at the Selected Firm's address indicated in such proposal; or to such other person or address as either may designate for itself in writing and provide to the other.

F. Independent Contractor
The Selected Firm is not an employee of the University, but is engaged as an independent contractor. The Selected Firm will indemnify and hold harmless the Commonwealth of Virginia, the University, and its employees and agents, with respect to all withholding, Social Security, unemployment compensation and all other taxes or amounts of any kind relating to the Selected Firm's performance of this Agreement. Nothing in this Agreement will be construed as authority for the Selected Firm to make commitments which will bind the University, or to otherwise act on behalf of the University, except as the University may expressly authorize in writing.

G. Worker's Compensation and Employers Liability
The Selected Firm will (i) maintain Employers Liability coverage of at least $100,000 and (ii) comply with all federal or state laws and regulations pertaining to Workers' Compensation Requirements for insured or self-insured programs.

H. Drug-Free Workplace
The Selected Firm, its agents and employees are prohibited, under the terms of this Agreement, Code of Virginia Section 2.2-4312, and the Commonwealth of Virginia, Department of Human Relations Management Policy Number 1.05, from manufacturing, distributing, dispensing, possessing, or using any unlawful or unauthorized drugs or alcohol while on University property. During the performance of this Agreement, the Selected Firm agrees to 1) provide a drug free workplace for the Selected Firm's employees; 2) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the Selected Firm's workplace and specifying the actions that will be taken against employees for violations of such prohibition; 3) state in all solicitations or advertisements for employees placed by or on behalf of the Selected Firm that it maintains a drug-free workplace; and 4) include the provisions of the foregoing clauses in every subcontract or purchase order of over $10,000, so that the provisions will be binding upon each subcontractor or vendor. For the purposes of this section, "drug-free workplace" means a site for the performance of work done in connection with a specific agreement awarded to a Selected Firm, the employees of whom are prohibited from engaging in the unlawful manufacturing, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the agreement.

I. Intellectual Property Rights/Disclosure
Unless expressly agreed to the contrary in writing, all goods, products, materials, documents, reports, writings, video images, photographs or papers of any nature including software or computer images prepared or provided by the Selected Firm (or its subcontractors) for the University will not be disclosed to any other person or entity without the written permission of the University. The Selected Firm warrants to the University that the University will own all rights, title and interest in any and all intellectual property rights created in the performance or otherwise arising from any Agreement resulting from this RFP and will have full ownership and beneficial use free and clear of claims of any nature by any third party including without limitation copyright infringement claims. The Selected Firm will execute any assignments or other
documents needed for the University to perfect such rights. Notwithstanding the foregoing, for research collaboration pursuant to subcontracts under sponsored research agreements administered by the University's Office of Sponsored Programs, intellectual property rights will be governed by the terms of the grant or contract to the University to the extent such grant or contract requires intellectual property terms to apply to subcontractors.

J. eVA Business To Government Registration
The eVA Internet electronic procurement solution, web site portal www.eva.state.va.us, is the Commonwealth of Virginia's comprehensive electronic procurement system. The portal is the gateway for firms to conduct business with state agencies and public bodies. All agencies and public bodies are expected to utilize eVA. All firms desiring to provide goods and/or services in the Commonwealth are encouraged to participate in the eVA Internet e-procurement solution. The Selected Firm is required to register in the eVA Internet e-procurement solution prior to an award being made.

K. eVA Transaction Fee
The Selected Firm agrees, by accepting an award as a result of this RFP, that it is a registered eVA vendor and will be subject to an eVA transaction fee, for which the Selected Firm will be invoiced by Commonwealth of Virginia, Department of General Services. Additional information is available at www.eva.state.va.us.

L. Contractor License Requirements
State statutes and regulatory agencies require that some firms be properly registered and licensed, or hold a permit, prior to performing specific types of services. If firms provide removal, repair, improvement, renovation or construction-type services they, or a qualified individual employed by the firm, must possess and maintain an appropriate State of Virginia Class A, B, or C Contractor License (as required by applicable regulations and value of services to be performed) for the duration of the Agreement. It is the firm’s responsibility to comply with the rules and regulations issued by the appropriate State regulatory agencies.

License #______________ Type___________________

A copy of the license must be furnished upon request to the University or VASCUPP member institution.
Attachment 2
Preferred Contractual Provisions

A. Goods and Services
   During the term of this Agreement, the Selected Firm will provide for the University the goods and services offered to the University by the firm in its proposal and/or any addenda to its proposal which has been approved in writing by the University and as may be further specified by the University in writing when it selected the firm.

B. Term of the Agreement
   The term of this Agreement will be for three years, with the ability to renew on the same terms and conditions, for two additional one-year periods if mutually agreeable to the University and the Selected Firm. The Selected Firm and the University will mutually agree at least 60 days prior to each renewal period whether to renew the terms of the Agreement.

C. Contract Administrator
   The University will identify a Contract Administrator for any Agreement which results from this RFP. The individual will be the point of contact at the University for day-to-day operations, but cannot approve amendments to the Agreement or price changes.

D. Waiver
   No waiver of any right will be deemed a continuing waiver, and no failure on the part of either party to exercise wholly or in part any right will prevent a later exercise of such or any other right.

E. Indemnification
   The Selected Firm will indemnify and hold harmless The Commonwealth of Virginia, The Rector and Visitors of the University of Virginia, and their agents, employees and officials from any and all costs, damage or loss, claims, liability, damages, expenses (including, without limitation, attorneys' fees and expenses) caused by or arising out of the performance or non-performance of the Agreement by the Selected Firm or its agents or subcontractors, including the provision of any services or products. The Selected Firm warrants that the products, goods and services provided the University may be used by the University without being in violation of any copyright, patent or similar property right or claim by others and will defend, indemnify and hold harmless the University (its employees and agents) from and against any such claim.

F. Governing Law
   This Agreement will be governed in all respects by the laws of the Commonwealth of Virginia.

G. Termination
   If the Selected Firm fails to provide quality goods or services in a professional manner, solely as determined by the University, and, upon receipt of notice from the University, does not correct the deficiency, to the University's satisfaction within a reasonable period of time, not to exceed five calendar days unless otherwise agreed to by both parties in writing, the University reserves the right to terminate this Agreement upon written notice to the Selected Firm.

H. Non-Appropriation
   Funding for any Agreement between the University and a Selected Firm is dependent at
all times upon the appropriation of funds by the Virginia General Assembly and/or any other organization of the Commonwealth authorized to appropriate such funds. In the event that funding to support this Agreement is not appropriated, whether in whole or in part, then the Agreement may be terminated by the University effective the last day for which appropriated funding is available.

I. Right of Audit
The University reserves the right to audit or cause to be audited the Selected Firm’s books and accounts regarding the University's account at any time during the term of this Agreement and for five years thereafter. The Selected Firm will make available to the University all books and records relating to performance of this Agreement as may be requested during said period.

J. Contractual Claims
This Agreement is subject to the University's policy on Contractual Claims which is provided as Attachment 3, Procedure for Resolution of Contractual Claims.

K. Insurance
Listed below is the insurance the Selected Firm must maintain under any Agreement resulting from this RFP. In no event should the Selected Firm construe these minimum required limits to be their limit of liability to the University. The Selected Firm will maintain insurance which meets or exceeds the requirements of the University with insurance companies that hold at least an A- financial rating with A.M. Best Company. No Agreement will be executed by the University until the Selected Firm satisfies the insurance requirements of the University. The Selected Firm may be required to provide the University with a valid Certificate of Insurance before providing any goods or services to the University. The University reserves the right to approve any insurance proposed by the Selected Firm.

Comprehensive Commercial General Liability
The Selected Firm and any Subcontractor will maintain a minimum combined single Limit of Liability for bodily injury and property damage of $500,000 per occurrence, with coverage for premises and operations.

L. Use of Agreement by Third Parties
In accordance with Section 2.2-4304 of the Code of Virginia, these organizations may have access to any Agreement resulting from this RFP to allow for cooperative purchasing by only the Virginia Association of State College and University Purchasing Professionals (VASCUPP) and all other Commonwealth of Virginia public institutions of higher education (to include four-year, two-year and community colleges). Current VASCUPP member institutions include: College of William and Mary, George Mason University, James Madison University, Old Dominion University, Radford University, University of Virginia, Virginia Commonwealth University, Virginia Military Institute, and Virginia Polytechnic Institute and State University. A list of all other Virginia Public Colleges and Universities is available at http://www.ExploreVirginiaColleges.com/. In addition, access to the Agreement may also be extended to 1) Any University related foundation, and 2) City of Charlottesville and County of Albemarle. Potentially, other member schools of the Atlantic Coast Conference (ACC) may also have access to any Agreement resulting from this RFP if such access is confirmed by the University. The other ACC member schools which may potentially participate are: Boston College, Clemson University, Duke University, Florida State University, Georgia Institute of
Technology, University of Miami, North Carolina State University, University of Maryland, University of North Carolina, Wake Forest University, and Wake Forest University Health Sciences. Other institutions which may participate include Emory University.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Selected Firm, the Agreement will be extended to the public bodies indicated above to purchase at the fees in accordance with the terms of the Agreement. The Selected Firm will notify the University in writing of any such institutions accessing the Agreement. No modification of the Agreement or execution of a separate agreement is required to participate. The Selected Firm will provide semi-annual usage reports for all VASCUPP member institutions and public institutions accessing the Agreement. Participating public bodies will place their own orders directly with the Selected Firm and will fully and independently administer use of the Agreement to include contractual disputes, invoicing and payments without direct administration from the University. The University will not be held liable for any costs or damages incurred by any other participating public body as a result of any authorization by the Selected Firm to extend the Agreement. It is understood and agreed that the University is not responsible for the acts or omissions of any VASCUPP member institution, or of any other entity accessing the Agreement under this section, and will not be considered in default of the Agreement no matter the circumstances. Use of this Agreement does not preclude any participating public body from using other agreements or competitive procurement processes as required by law.

M. Favored Nations
The Selected Firm represents that the prices, terms, warranties, and benefits specified in its proposal are comparable to or better than the equivalent terms being offered by the firm to any present customer.

N. Payment Terms
Invoices submitted to the University for Services will be paid Net 30 days after receipt and University approval of invoice. Invoices are to be submitted monthly. Each invoice shall include both the purchase order and work order numbers assigned by the University. In addition, each invoice will include the following information in a line item format:
   i. Date of service
   ii. Separate line item for services, equipment, or rental
   iii. Service Description

O. Cancellation of Contract
The University reserves the right to cancel this Agreement, in part or in whole, without penalty, upon 30 days written notice to the Selected Firm. Any Agreement cancellation notice will not relieve the Selected Firm of the obligation to deliver and/or perform on all outstanding issues prior to the effective date of cancellation.

P. Small, Women-owned and Minority (SWAM) Business Reporting
The Selected Firm will identify and fairly consider SWAM firms for subcontracting opportunities when qualified SWAM firms are available to perform a given task in performing for the University under the resulting Agreement. The Selected Firm will submit a quarterly SWAM business report to the University by the 8th of the month following each calendar quarter, specifically the months of April, July, October, and January. The Selected Firm will submit the quarterly SWAM business reports to: Nancy Noblette
Administrative Assistant to the Director of Procurement Services
E-mail: nrn9g@virginia.edu

The quarterly SWAM business reports will contain this information:
• SWAM firms name, address and phone number with which the Selected Firm has contracted over the specified quarterly period.
• Contact person at the SWAM firm who has knowledge of the specified information.
• Type of goods and/or services provided over the specified period of time.
• Total amount paid to the SWAM firm as it relates to the University’s account.

The Selected Firm’s failure to provide SWAM reports on a quarterly basis which contain the information required by this section and/or the Selected Firm’s failure to comply with the plan for utilizing SWAM businesses submitted by the Selected Firm as part of its proposal and/or negotiation response may be grounds for debarment pursuant to Section 4.M. of the “Purchasing Manual for Institutions of Higher Education and their Vendors.”
Attachment 3

Procedure for Resolution of Contractual Claims

Section 2.2-4363 of the Virginia Public Procurement Act requires contractors with the University to submit any claims, whether for money or other relief, in writing no later than 60 days after final payment, however, written notice of the contractors intention to file such a claim must be given at the time of the occurrence or beginning of the work upon which the claim is based. The University's procedure for deciding such contractual claims is:

A. The Selected Firm must provide the written claim to:
   Assistant Director of Procurement Services
   University of Virginia
   1001 North Emmet Street
   P. O. Box 400202
   Charlottesville, Virginia 22904-4202

B. Although the Selected Firm may, if it chooses, attempt to resolve its claim by dealing with a University department other than the one stated in Section A above, the Selected Firm must submit any unresolved claim in writing no later than 60 days after final payment to the Assistant Director of Procurement Services if it wishes to pursue its claim.

C. Upon receiving the written claim, the Assistant Director of Procurement Services will review the written materials relating to the claim and decide whether to discuss the merits of the claim with the Selected Firm. If such discussion is to be held, the Assistant Director of Procurement Services will contact the Selected Firm and arrange such discussion. The manner of conducting such discussion will be as the Assistant Director and the Selected Firm mutually agree.

D. The Assistant Director of Procurement Services will mail his or her decision to the Selected Firm within 60 days after receipt of the claim. The decision will state the reason for granting or denying the claim.

E. By providing a written statement explaining the basis of the appeal, within 15 days after the Selected Firm's receipt of the decision, the Selected Firm may appeal the decision to:
   Director of Procurement Services
   University of Virginia
   Carruthers Hall
   1001 North Emmet Street
   P.O. Box 400202
   Charlottesville, Virginia 22904-4202

F. Upon receiving the written appeal, the Director of Procurement Services will review the written materials relating to the claim and decide whether to discuss the merits of the claim with the Selected Firm. If such discussion is to be held, the Director of Procurement Services will contact the Selected Firm and arrange such discussion. The manner of conducting such discussion will be as the Director of Procurement Services and the Selected Firm mutually agree.

G. The Director of Procurement Services will mail his or her decision to the Selected Firm within 60 days after the Director of Procurement Services receipt of the appeal. The decision will state the reasons for granting or denying the appeal.
Attachment 4

Executive Vice President and Chief Operating Officer’s Request for Commitment

Greetings:

The quality of service the University of Virginia is able to deliver to its customers is directly related to the excellent support we receive from you and many other outstanding suppliers of goods and services. Without you, we would not be able to fulfill our educational, health care and research missions. An important part of our procurement program involves our commitment to doing business with small, women- and minority-owned (SWAM) businesses. As one of our most important vendors, we look to you to help us achieve this objective.

We conduct substantial business with small firms. We have been less effective in securing long-term business relationships with minority-and women-owned businesses. We are determined to improve our record.

I seek your assistance in two areas. First, to the extent practical, I ask that you involve small, women-and minority-owned businesses in the delivery of services you provide to UVa. Second, I seek your help in reporting your results through our quarterly subcontracting reports. The terms and conditions previously provided to your organization outlined this process.

This effort is important to us. We depend on you in so many ways – this is another way that we can partner with your company to make things better.

Sincerely,

Leonard W. Sandridge
Executive Vice President and Chief Operating Officer
LWS:dr
Madison Hall · Post Office Box 400228 · Charlottesville, Virginia 22904-4228
Attachment 5
Technical Specifications

1. The Successful Firm(s) shall provide all the labor, equipment, supplies and material for collecting data from the BAS, analyzing data, and providing monthly written reports to the Energy Programs Manager. Data collection and analysis services are the collection of BAS data and analysis of the data to identify specific opportunities to conserve energy or improve operations. The Successful Firm shall provide and install devices capable of collecting real time data from the BAS, storing that data, locally (at the University) or remotely, and transmitting that data offsite for analysis.

2. Data Analysis and Detail of Analysis Reports
   The report shall identify by building and specific device any problems indicated, energy savings potential, and cost savings potential using current energy prices paid by the University. The Successful Firm shall have engineering staff available to quantify energy and cost savings opportunities. Reports shall be provided electronically in spreadsheet or word processor format once per month. Once per month, the Successful Firm shall also provide a conference call or meet in person with University staff to answer questions or provide additional information.

<table>
<thead>
<tr>
<th>Data collected from the Material Science Building shows the following</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make up air temperature: 63F</td>
</tr>
<tr>
<td>Preheat Control Valve: 0% Open</td>
</tr>
<tr>
<td>Post Preheat Air Temperature: 81F</td>
</tr>
<tr>
<td>Problem or Opportunity: Preheat control valve may be leaking through.</td>
</tr>
<tr>
<td>Post Preheat Coil Temperature Sensor may be malfunctioning</td>
</tr>
<tr>
<td>Data Analysis: If preheat control valve is leaking through,</td>
</tr>
<tr>
<td>Energy Savings: XXX MMBtu</td>
</tr>
<tr>
<td>Energy Cost Savings: $/year</td>
</tr>
<tr>
<td>If temperature sensor is malfunctioning, damage could result</td>
</tr>
<tr>
<td>due to failure to indicate freezing problems, or could cause</td>
</tr>
<tr>
<td>cooling coil valve to open when not necessary</td>
</tr>
</tbody>
</table>

Raw data shall be available for transfer to the University upon request. It is not anticipated that this will be frequently needed. All data collected and reports generated will be the property of the University. No University information, either provided to, or collected by, the Successful Firm, shall be shared with any other entity without the express written consent of the University.

3. Data Collection Devices and Protocol
   The Successful firm shall identify in their proposal the types of data collection devices that will be necessary, their interconnection to the BAS, anticipated programming changes to the BAS, number of devices, etc. Any BAS programming changes necessary to support the data collection efforts shall be the responsibility of the University.

4. Cost:
   The proposal shall identify all costs/fees including, but not limited to, installation,
maintenance, rental, and any ongoing annual or monthly costs. If your firm intends to bill the University for something then the cost must be included in your proposal. All costs must be itemized in your proposal and listed under the heading “Financial Proposal.”

5. Service Interruption and Security
   a. Data collection shall not interfere with the operation of the BAS or the ongoing collection of BAS data for other purposes.
   b. Data collection devices shall be protected so that power interruption will not cause data loss.
   c. Security protocols or hardware shall be provided to prevent hacking into the BAS from data collection devices or interconnections.
   d. Failure of any data collection device shall not interfere or cause failure or shutdown of the BAS or connected systems.

6. Frequency of Data Collection
   The University currently collects data samples from the BAS at 15-minute intervals (nominally), which is satisfactory for most University needs. Proposed data collection devices shall be capable, at a minimum, of collecting and storing data at 15 minute intervals, but should also capable of sampling more or less frequently as is necessary to diagnose problems.