

Climate Action Plan (RFP) Guidelines

an open-source collaboration

Last Update: 1/30/2025

Overview

The purpose of this document is to support staff members tasked with creating or writing an Request for Proposal (“RFP”) for consulting services to create any of the following:

- Climate Action Plan
- Decarbonization Plan
- Carbon Mitigation Plan
- Climate Action and Resilience Plan
- Climate Action and Adaptation Plan
- Net-zero Energy/Carbon Plan

This may also be helpful for a broader sustainability plan but may not capture some of the specific nuances commonly included.

This document focuses on colleges and universities and may also help cities, governments, corporations, non-profits, or other organizations.

Preparation

The following questions will help you prepare relationships, leadership buy-in, and specifics around your institution's procurement process:

- Have you discussed the need or desire for a plan with the appropriate constituents and the senior leaders who would need to approve the plan?
- Do you have a commitment from campus leadership for implementation support (staff time, funds, etc.) once the plan is complete?
- Have you established a general idea of who would lead and support the effort inside the institution (staff, faculty, admin)?
- Have you done any exploratory calls with potential vendors? Are there elements of what they have shown you that you want to include in the plan or scope of the RFP?
- Have you met with other campuses that have recently completed a plan you’d like to emulate? What lessons can they provide?
- Have you run an RFI process to gather high-level details from prospective firms?
 - This can help you establish pre-shortlisted firms for the RFP process and can help break up the final review process into more manageable pieces.
- Can you describe your desired end-state (e.g. 1 year, in 5 years, by 2050), assuming your plan leads to action?

Elements to include in your RFP

- What is your ultimate goal for this plan? E.g.,
 - Get the President / Board of Trustees to approve a 5-year capital plan
 - Create a credible roadmap to guide formal planning and project decisions
 - Foster cross-campus buy-in by developing a plan with broad stakeholder engagement
- Scope of Work Boundaries
 - Scopes of Emissions / sub-scopes
 - Which facilities/locations/campuses?
 - Utilities: electricity, gas, fleet, scope 3?
 - Planning horizon? Next 5 years? Now to 2050?
 - *Does your planning horizon need to include the payback period?*
- Schedule
 - Do you have key unmovable milestones (e.g. we have a board meeting on Sept 17th where we have 30 mins to present to the board.)
 - *Note: Calendar time is one of the largest drivers of consulting time costs. The same amount of work spread over 6 months vs. 3 months might cost almost 2x as much.*
 - How often do you expect the consulting team to meet with the institution?
 - How much time will the institution spend outside of meeting with the consulting team?
- Process
 - Describe: "What does a successful plan/process look like?"
 - Stakeholder Engagement
 - Are these four key meetings with knowledgeable staff or one year of robust engagement, ranging from community members to the Board of Trustees?
 - Does the institution have a project manager or facilitation expert on staff/faculty or does the consultant need to provide that?
 - Describe the nature of the support you are looking for and why your internal team can't provide that?
 - Vendors know that the biggest competitor is the internal team deciding they can just do it themselves.
- Deliverables
 - Written Report - describe as many details as possible about what you want.
 - Length / Style
 - Do you want a long formal report with deep appendices?
 - A short, graphics-forward report that is easy to consume?
 - What is the expected page count? (e.g. 12 pages, 120 pages?)
 - Who are your most important audiences?
 - Who are the important stakeholders who need to contribute to development?
 - Word document or glossy print piece?

- Shared internally only? Shared widely externally?
 - Key Presentation(s) - describe in as much detail as you can what you want.
 - Do you need support to create a “Road Show” deck?
 - Do you require a formal presentation to the executive team, faculty leadership, and/or board of trustees?
 - Is there a formal ask in your presentation to seek approval for funds for a specific initiative or the plan itself?
 - Models
 - Do you require a model (excel or software) to live beyond the planning process?
 - How granular should the model be?
 - What level of data visualization do you expect?
 - Cost Model / Budgets
 - Do you expect more than order-of-magnitude financial estimates?
 - Do you only expect simple payback or a full cash flow model?
 - Do you have an internal cost of carbon or similar?
 - Do you expect the use of a cost-of-carbon in the financial payback calculations?
 - Communication Plan
 - Do you expect a formal communications plan?
 - Who will execute the communications plan? In-house staff, the vendor (or a vendor sub) to execute the communications plan?
 - If you are asking the consultant to develop to final plan, what internal campus branding and/or style guidelines must be followed?
- Technical
 - **Provide as much technical detail as is available and relevant to your plan goals.** Your facilities and/or energy management team should be willing to fill in any details you don't have.
 - Any annual Greenhouse Gas Emissions inventories to date
 - What's the quality of this information?
 - Gross Square Feet of buildings
 - FTEs on Campus
 - Annual Spending on utilities
 - The unit cost of electricity & natural gas
 - Do you have excessive demand or delivery costs?
 - Do you hedge commodity prices?
 - Current systems description. (e.g. Steam, Chilled Water, Electricity capacity, peak demand, annual averages?)
 - Growth/expansion plans (Is a campus master plan available?)
 - Significant shifts expected. For example:
 - the XYZ contract is up for renewal next year, or
 - we are adding X 000 GSF each year for the next five years.
 - Consider using an NDA if you would like to provide more details without publicizing all the information.

- Studies you have recently completed
 - Comprehensive Utility Plan (a.k.a. Utility Master Plan)
 - Energy Efficiency Progress report(s)
 - Other technology evaluations
 - Renewable energy studies or solicitations you have received
- Specific solution categories you want to be considered/evaluated (e.g. energy efficiency, solar, district energy, offset, etc.)
 - Technical rigor expected for each category under consideration
 - How many options do you want to be considered for each carbon footprint Scope?
- **Value add requests**
 - *What value-added services will the consultant offer as part of your proposal?*
 - E.g.,
 - hire an intern from the college for the term of the engagement
 - Guest lecture for a class?
 - Would the firm interact with faculty researchers?
- **Decision criteria for selecting a vendor?**
 - Will you select on qualifications and then negotiate a scope, fee and schedule (Request for Qualifications + Negotiation) or will you select on best fit of qualifications, scope, fee & schedule (Request for Proposal.)
 - Make a clear statement about if you will select a firm on *Best Price* (low-bid that meets the requirements) or *Best Value* (best combination of approach, team, experience, price, etc.)
 - E.g. – we will choose respondents according to the following rubric (including possible points or percent for each item):
 - Experience with similar institutions
 - Total Cost
 - References/experience in higher education
 - Project Approach
 - Team
 - Small, Women-owned, Minority-owned requirements
 - Other factors...
- **RFP Schedule:**
 - Releasing the RFP
 - Questions about the RFP
 - Response to questions about the RFP
 - The due date for responses
 - Expected selection of firms/teams to interview
 - We plan to select 2-5 firms that we will interview.
 - If possible, share times for the interviews well in advance.
 - Are interviews virtual or in-person?
 - Expected time to make a final selection
 - Expected time for contract negotiation
 - Expected kick-off date

- Budget guidance
 - The budget range for climate action services is very broad. We've seen budgets under \$10K for light support for a single consultant and over \$1M for a fully staffed team leading a whole-of-institution process for a year+.
 - You can always break the process into phases to stay within annual budgets and complex procurement requirements and to ensure you have picked the right team.
 - You don't want to tip your cards, but perhaps frame in broad strokes if possible. Firms want to know this is not a dead-end fishing expedition or that the total budget is \$5K when they require a fee of \$100K + to be interested in pursuing it.
 - E.g.,
 - *We have 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.* (Implies, "We'll pay for good value.")
 - *We have \$XYZ set aside for this effort and will choose based on experience and approach.* (e.g. force vendors to compete on services for the same money)
 - What format do you want for pricing?
 - Fixed bid (single number)
 - Hourly rates with not-to-exceed?
 - Cost by phase/milestone?
 - Note that you want to be careful not to prescribe too much granularity since vendors will typically pick a number and back-justify it. Calendar time & team size are the biggest drivers of cost.
- Describe what you'd like to know about the firm experience
 - What minimum or maximum number of examples and/or references would you like to receive?
 - How old can those examples be (within the last 5 years?)
 - Are there specific details you want to know:
 - Type of institution
 - Cost range of projects
 - When did work occur?
 - Scope of work
 - What do you want to know about the firm's proposed team?
 - Name
 - Title
 - Role
 - Background
 - Do you need their formal resume?
- Proposal format
 - Do you have specific sections and flow that you want all proposals to follow?
 - Do you have a maximum number of pages? (firms will provide everything and the kitchen sink if they think it will help.) 20 pages is typically plenty.

- Do you have a maximum number of pages per section?
- Do you want pricing separate from the approach?
- Do you want a PDF, Word Document, or physical printed copy?
 - Can people submit a printed copy after the due date if they provide a PDF copy by the deadline?
(This would save a lot of scrambling at the UPS or FedEx store!)
- Do you want testimonials from other campuses that have worked with the firm on similar projects?

Sample Scopes

University of Arizona (2022)

https://vendors.arizona.edu/sites/default/files/2022-06/S052207_Sustainability_Climate_Action_Plan.pdf

- See pages 36-38

UMass Amherst: Carbon Mitigation Plan (2019)

<https://www.bidnet.com/bneattachments?/581857278.pdf>

- See pages 6-9

William and Mary: CAP - Scope 1 Emissions Analysis (2021)

https://govshop.com/media/opportunities/documents/cafd5a6c46626bfb90a8a1ec35b140f2rfp_climate-action-plan-scope-1.pdf

- See pages 5-6