

NYSERDA Solicitations

User Guide

Submitting Concept Papers and Proposals in the NYSERDA Portal
June 2022



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1 Introduction

The following user guide provides instructions on how to submit Concept Papers and Proposals as part of NYSERDA solicitation process.

Access

To submit or edit a Concept Paper or Proposal: Access the NYSERDA Portal via the “apply online” link from the Current Funding Opportunities page on the NYSERDA website.

- Login with your NYSERDA Portal username and password credentials (if you have previously created an account your username is your full email address followed by “.nyserda” for example jsmith@gmail.com.nyserda) You must include the “.nyserda” or you will not be able to login to the system.) Click the create a new submission button.
- Create an account if you do not have already have one (see the following pages for details).

Important Reminders

All Concept Papers or Proposals must be received by 3:00 p.m. ET on the date noted in the solicitation. Late, faxed, or emailed Concept Papers or Proposals will not be accepted. Incomplete Concept Papers or Proposals may be subject to disqualification—it is the proposer’s responsibility to ensure all pages are included.

For online submission, there may be questions you are required to answer in addition to uploading attachments, and you should allot at least 60 minutes to complete your submission. To begin the Concept Paper and Proposal submission process, select the appropriate solicitation (from the Current Funding Opportunities page) and click the link to the apply online.

Questions

Contact Contract Management (jsolicitation@nyserda.ny.gov or 518-862 1090 ext. 3418) or the program contact listed in the solicitation for submission questions.

2 Getting Started

Please read the following requirements before submitting a Concept Paper or Proposal electronically

Before you begin, ensure you are using one of the supported browsers: Microsoft® Internet Explorer® 11 and Apple® Safari® version 12.x on macOS. The most recent stable versions of Microsoft Edge, Mozilla® Firefox®, and Google Chrome™.

All Users will need a NYSERDA Portal account.

- Login with your NYSERDA Portal username and password credentials or create an account if you do not already have one (see page 5 for details on creating an account).
- Once registered, check your email for the auto generated NYSERDA Portal Welcome notice for your assigned username.
- Autogenerated emails will be sent from NYSERDA Portal or NYSERDA No Reply. Please add noreply@salesforce.com; salesforcesupport@nyserda.ny.gov; and no-reply@nyserda.ny.gov to your contact/addressbook to ensure these emails are not marked as spam.
- It is strongly suggested you start the process early, input your information, attach all required documents, and submit well before the deadline.
- Please note: The portal will close promptly at 3:00 p.m. ET on the due date even if you are actively logged in.
 - Electronic file names should include the proposing entity's name in the title of the document. Note: There is an 80-character limit.
 - You may submit Word, Excel, or PDF files (file formats can include csv, doc, docx, gif, jpeg, jpg, pdf, png, ppt, pptx, pps, ppsx, tif, txt, xls, xlsx, and zip). Individual file sizes should be 100MB or less.
 - PDF files must be searchable, and therefore, should be converted directly from an electronic document to PDF. Do not scan the files.
 - After the necessary files have been uploaded, the “Authorized Signature and Certification” page will summarize all the information you entered. Review the information to ensure your Concept Paper or Proposal is complete and accurate.
 - When you have completed all steps of your submission, click the “Submit” button.
 - After submitting, you will see a green text box noting that your Concept Paper or Proposal has successfully been submitted. An autogenerated confirmation of submission will be sent to the email address you entered—you must save this. If you do not receive an email, confirm the email address you provided and check your spam folder.

3 Account Registration

- If you already have a NYSERDA Portal account, navigate to nyserderda.ny.gov → funding opportunities → current funding opportunities and click on the solicitation you are interested in. Then click “Apply Online.”
- If you do NOT have a NYSERDA Portal account, click on “Create an Account” to access the “NYSERDA - Portal Registration” page.

NYSERDA

PORTAL LOGIN

Returning Users: The Username for the proposal submission system is your email address followed by “.nyserderda”. For example, jsmith@abc.com.nyserderda . You must include the “.nyserderda” or you will not be able to login to the system.

Login to NYSERDA Portal

Username

Password

LOGIN

Not registered? [Create an account](#)

[Forgot Password?](#)

- Input your “Company Information” and “Contact Information” and complete the mandatory fields, which are marked with an * asterisk symbol.
- Create and confirm your password. Your password cannot be less than 15 characters long with at least one upper case and one lower case letter, one number, and one special character (\$@!%?&).
- Click the “CREATE” button.
 - You will receive portal registration confirmation via email to the address you provided in the contact section.

PORTAL REGISTRATION

Please register below with the main company information, not the sub-entity (LLCs, Inc, etc.) information.

Company Information

Company Name * My Company is Outside of the United States & Canada

Address 1 *

Address 2

City *

State *

Zip *

Contact Information

First Name *

Last Name *

Title *

Email *

Phone *

Password Information

Password *

Confirm Password *

CREATE

4 Action Boxes, Help Text, Required Fields, and Application Number

Action Boxes:

Blue Action box contains text specifying user action required

Green Action box contains text notifying user success in specified application step

Red Action box contains text for any application errors that need to be corrected by user

- **Help Text:** Clicking on the question mark '?' symbol available next to selected fields expands guidance text as shown in the example below
- **Required fields:** All mandatory information fields are marked with a red asterisk (See example below for Company Name *)

ADD A CONTACT

| | |
|-----------------|--------------------------|
| Alternate Party | <input type="checkbox"/> |
| Company Name * | <input type="text"/> |
| First Name * | <input type="text"/> |
| Last Name * | <input type="text"/> |

The Company Name and Tax Identification Number (TIN) must match the information provided to the Internal Revenue Service (IRS). Please confirm that the information provided here is identical to the company's W-9 as submitted to the IRS.

Use the page markers (circles at the top right of the page) to return to a previous page at any point in the submission process.

Application Number: 0000101478

Multi Round Solicitation



Proposer Contact Information (Step 1 of 6)

Click "ADD A CONTACT" to provide information on contacts who will be involved in the proposed project.

[+ ADD A CONTACT](#)

| Action | Name | Email | Phone | Company Name | Primary |
|--|------------|--------------------|----------------|--------------|---------|
| Edit Clone | Clark Kent | superman@gmail.com | (518) 862-1090 | Krypton | Yes |

PREVIOUS

CONTINUE

Contact Information

On the Contact information page:

- Add a contact. You are required to add a "Primary Contact" for each Concept Paper or Proposal you submit.

Please note: Notifications and correspondence will be sent to the email address of the primary contact (e.g., confirmation of submission email, award/non-award notification letter).

Add a contact

Alternate Party

My Company is Outside of the United States & Canada

Company Name *

First Name *

Last Name *

Title

Email *

Phone *

Primary Contact

Contract Signer

Address 1 *

Address 2

City *

State *

Zip Code/Postal Code *

DUNS Number

Tax identification type * Employer Identification Number (EIN) SSN

Is this entity tax exempt?

[CLOSE](#) [SAVE CHANGES](#)

- Input information in all mandatory fields and click “SAVE CHANGES” to update Contact Information.
- Click “CONTINUE.”

5 Site Information

If prompted, add your Site Information (Note: Not all Concept Paper and Proposal submissions require site information, this may change the number of total steps involved within the application)

- Create a New Site: Click “ADD A SITE” to open a separate “Edit Site” window
- Edit an Existing Site: Click on “Edit” beside address to update site related information
- Complete address information and click “CONTINUE”

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Multi Round Solicitation

Site Information (Step 2 of 7)

Click "ADD A SITE" to provide information on sites that will be involved in the proposed project.

ADD A SITE

| Action | Address 1 | Address 2 | City | State | Zip | County | Electric Utility Company |
|----------------------------|-----------|-----------|------|-------|-----|--------|--------------------------|
| Please add a site address. | | | | | | | |

PREVIOUS CONTINUE

Input information in all mandatory site address fields (if applicable) and click “SAVE.”

Add New Site Address ×

Site Name * ?

Address 1 *

Address 2

City *

State * ▼

Zip *

County ▼

Regional Economic Development Council ▼

Electric Utility Company ▼

Electric Utility Account Number ?

Gas Utility Company ▼

Gas Utility Account Number ?

Do you pay System benefits Charge (SBC)? ▼ ?

Add another site if applicable. When all sites have been added, click "Continue."

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Multi Round Solicitation



Site Information (Step 2 of 7)

Click "ADD A SITE" to provide information on sites that will be involved in the proposed project.

ADD A SITE

| Action | Address 1 | Address 2 | City | State | Zip | County | Electric Utility Company |
|---|--------------------|-----------|--------|----------|-------|--------|--------------------------|
| Edit Delete | 17 Columbia Circle | | Albany | New York | 12203 | | |

PREVIOUS

CONTINUE

6 Concept Paper and Proposal Information

- On the Concept Paper or Proposal Information page, input information in the mandatory fields as shown. Fill in the Project Title, Proposed Concept Paper, or Proposal Category (use the drop down to select the appropriate category—if categories were not listed in the solicitation, choose the option available), Proposer Company information, and Concept Paper or Proposal Description.
- Click “CONTINUE.”

Home Projects Project Invoices Dashboards Manage Users

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Multi Round Solicitation

Concept Paper Information (Step 2 of 6)

* indicates required field
Describe the project you are proposing.

Proposed Information

Concept Paper Title *

Proposed Concept Paper Category *

Proposer Company Information *

Concept Paper Description *

PREVIOUS

Vendor Assurance of No Conflict of Interest or Detrimental Effect

Depending on the solicitation that you are applying to, a Vendor Assurance of No Conflict of Interest or Detrimental Effect statement may pop-up. If applicable, read the statement and check the appropriate answer:

- Select no, if there is no conflict of interest.
- If you select yes, there is a conflict of interest, you will be required to upload a document titled “Disclosure Statement” on the proposal documents page. This document can be located on the solicitation’s webpage under Associated Documents.

Vendor Assurance of No Conflict of Interest or Detrimental Effect

The individual or entity offering to provide services pursuant to this solicitation, attests that its performance of the services outlined in this proposal does not and will not create a conflict of interest with nor position the individual or entity to breach any other contract currently in force with the State of New York.

Furthermore, the individual or entity attests that it will not act in any manner that is detrimental to any State project on which the individual or entity is rendering services. Specifically, the individual or entity attests that:

1. Its fulfillment of obligations, as outlined in its proposal, does not violate any existing contracts or agreements between the individual or entity and the State;
2. Its fulfillment of obligations, as outlined in its proposal, does not and will not create any conflict of interest, or perception thereof, with any current role or responsibility that the individual or entity has with regard to any existing contracts or agreements between the Firm and the State;

Yes, There is a Conflict of Interest

No, There is No Conflict of Interest



SAVE

Please Read Carefully and check atleast one of the checkbox.

This step is for Proposals only: You will need to provide Yes/No responses to Checklist and Disclosure of Prior Findings of Non-Responsibility questions.

- Based on the answer you select, additional information may be required.

Checklist Questions

1. Do you accept all Terms & Conditions in the Sample Agreement? * Yes No 
2. Do you wish to have any information submitted in your proposal package treated as proprietary or confidential trade secret information? * Yes No 
3. Are you a Minority or Women-Owned Business Enterprise? * Yes No
4. Are you a certified Service-Disabled Veteran-Owned Business Enterprise? * Yes No
5. Does your proposal contain certified Service-Disabled Veteran-Owned Business Enterprises as Subcontractors? * Yes No
6. Is other public funding pending/awarded on this and/or very similar topic (prior and/or competing proposals)? * Yes No
7. Previous NYSERDA Contracts awarded? * Yes No
8. Prior and/or competing proposals submitted? * Yes No

Disclosure of Prior Findings of Non-Responsibility

1. Has any Governmental Entity made a finding of non-responsibility regarding the Individual or Entity seeking to enter the Procurement Contract in the last five years? * Yes No
2. Has any Governmental Entity or other governmental agency terminated or withheld a Procurement Contract with the above-named Individual or Entity due to the intentional provision of false or incomplete information? * Yes No

7 Concept Paper and Proposal Budget

Not all solicitations require a budget. If prompted, complete the following fields on the budget page:

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Multi Round Solicitation

Concept Paper Budget (Step 3 of 6)

Provide detail on the budget of the proposed project.

Success! Budget Information Saved.

Proposed NYSERDA Cost *

Proposed Cost Share

Proposed Total Cost

PREVIOUS SAVE CONTINUE

- Proposed NYSERDA Cost (Leave the default “0” if funding is not applicable)
- Proposed Cost Share (non-NYSERDA funding), if applicable. (Leave the default “0” if cost share is not applicable)
- Click “SAVE” if you need to stop and would like to save your work or “CONTINUE” (note: the green notification bar indicates the save was successful).

8 Concept Paper and Proposal Documents

Upload your Concept Paper or Proposal documents to the Documents page.

In the “Required Documents” section, click on the “Choose File” button to upload attachments. Please note the following:

- Based on the type of submission required attachments may vary. For example, you may be required to upload a Concept Paper or Proposal Document.
- Required Documents: these documents are mandatory for Concept Paper or Proposal submission. The main proposal document may also be called "Summary" or "Narrative."
- If you selected yes to the “Vendor Assurance of No Conflict of Interest or Detrimental Effect” statement, you will be required to upload the Disclosure Statement. The Disclosure Statement document can be located on the solicitation’s webpage under Associated Documents.

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Multi Round Solicitation

Concept Paper Documents (Step 4 of 6)

The following documents listed below under the 'Required' and 'Optional' section must be uploaded as outlined within this [solicitation](#).
Please note: You can only upload one attachment per submission field, unless otherwise noted. If there are multiple parts to your Concept Paper or Proposal, the files must be combined and uploaded as one file.

Files have been saved successfully.

| Document Name | Recent Uploaded Document | Upload History | Status | Add / Update Document |
|-----------------------------------|--------------------------|----------------|--------|----------------------------|
| Attachment A - Proposal Narrative | | | | Choose File No file chosen |
| Disclosure Statement | | | | Choose File No file chosen |

PREVIOUS SAVE CONTINUE

- Optional: not required for submission
- Click “Browse” if using IE or “Choose File” if using Chrome to upload your attachment.
- You can only upload one attachment per submission field. If there are multiple parts to your Concept Paper or Proposal, the files must be combined and uploaded as one file. You can utilize free pdf software to combine files, including [combinepdf.com](#), [smallpdf.com](#), and [freepdfconvert.com](#).

Based on the file type, please note:

- Files must be smaller than 100MB or they will not upload. [Click here](#) for tips on how to reduce file size.
 - For due date solicitations: If you would like to edit or replace a document you previously uploaded, you can edit and resubmit prior to 3:00 p.m. ET on the solicitation due date.
 - Attachments cannot be deleted, but you can make edits.
 - If you upload an incorrect file, uploading another file in that slot will overwrite the incorrect file. The most recent uploaded document will be saved and reviewed by NYSERDA.
 - The history of document upload cannot be deleted. If you would like to see the pages that are part of the submission process, screenshots are provided in this guide.

9 Authorized Signature and Certification

The “Authorized Signature and Certification” page will summarize all the information you entered. Review the information for accuracy.

- If you would like to review the information before submitting, use the page markers (circles at the top right of the page) to navigate back to pages you completed.

Application Number: 0000101478

Multi Round Solicitation

Authorized Signature and Certification (Step 5 of 6)

Review the details of your concept paper submission shown below.

Primary Company Contacts

| | | | |
|---------------------------------------|------------|------------|-----------------|
| Company Name: | Krypton | Address 1: | 456 Main Street |
| Tax identification type: | EIN | Address 2: | |
| Employer Identification Number (EIN): | 22-2222222 | City: | Smellville |
| DUNS Number: | | State: | Kansas |
| | | Zip: | 67524 |

| Name | Email | Title | Phone | Role | Primary |
|------------|--------------------|-----------|----------------|----------|---------|
| Clark Kent | superman@gmail.com | President | (518) 862-1090 | Proposer | Yes |

The “Authorized Signature” is represented by the check box and certifies acknowledgment of the attestation.

The undersigned: (1) recognizes that this questionnaire is submitted for the express purpose of assisting NYSERDA in making responsibility determinations regarding award or approval of a contract or subcontract and that NYSERDA will rely on information disclosed in the questionnaire in making responsibility determinations; (2) acknowledges that NYSERDA, in its discretion, by means which it may choose, may verify the truth and accuracy of all statements made herein; and (3) acknowledges that intentional submission of false or misleading information may result in criminal penalties under State and/or Federal Law, as well as a finding of non-responsibility, contract suspension or contract termination.

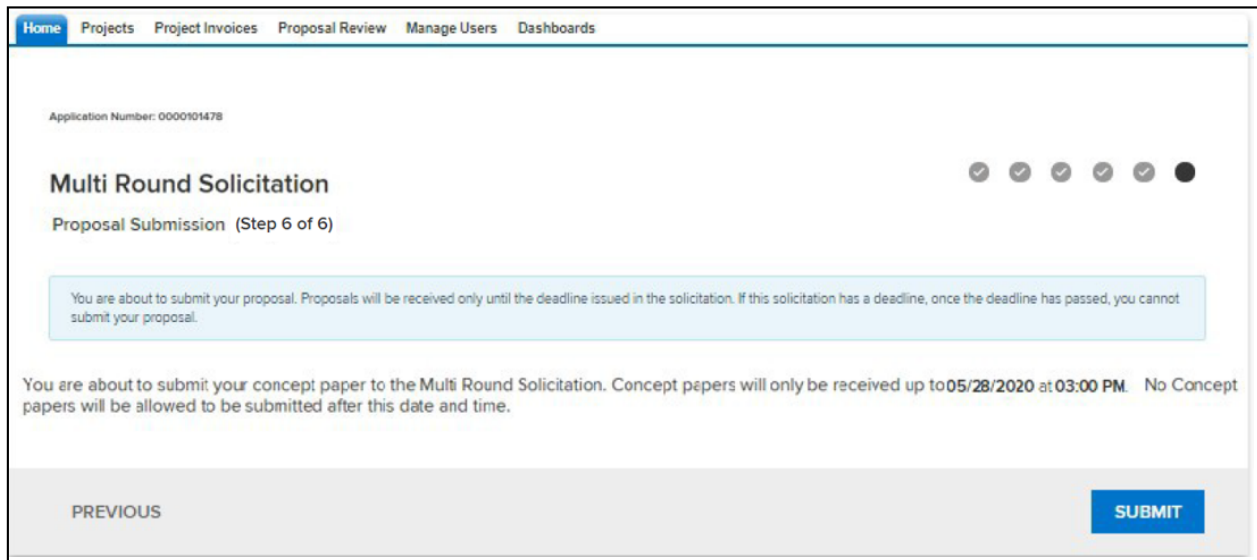
The undersigned certifies that they:

- are knowledgeable about the Proposing Entity's business and operations;
- have read and understand all of the questions contained in the questionnaire;
- have not altered the content of the questionnaire in any manner;
- have reviewed and/or supplied full and complete responses to each question;
- to the best of their knowledge, information and belief, confirms that the Proposing Entity's responses are true, accurate and complete, including all attachments, if applicable;
- understand that NYSERDA will rely on the information disclosed in the questionnaire when entering into a contract with the Proposing Entity; and
- is under an obligation to update the information provided herein to include any material changes to the Proposing Entity's responses at the time of bid/proposal submission through the contract award notification, and may be required to update the information at NYSERDA's request prior to the award and/or approval of a contract, or during the term of the contract.

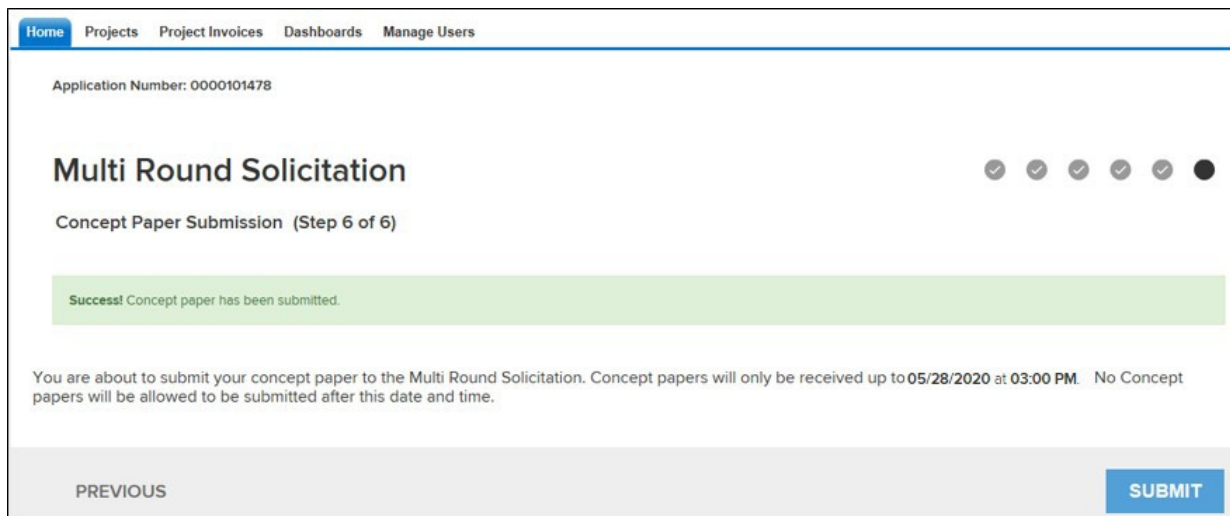
10 Concept Paper and Proposal Submission

On the Concept Paper or Proposal Submission page, click the “SUBMIT” button.

- The submit button must be pressed prior to 3:00 p.m. ET on the due date for your submission to be accepted.



- A green notification bar will appear when the submission is successful.



Reminders:

- Changes/updates to Concept Paper and Proposals can be made prior to 3:00 p.m. ET on the due date of the solicitation. Files in process, edits, or attempted submissions at or after 3:00 p.m. will be locked out of the system (the screen may blank) and the submission will not be accepted.
- It is strongly suggested you start the process early, input your information, all required documents, and submit well before the deadline.
- The Concept Paper/Proposal will be unavailable for viewing or edits after the due date has passed.
- The primary contact will receive an email that the Concept Paper or Proposal has been submitted.

11 Complete, Edit, or Submit Concept Papers and Proposals

To edit a Concept Paper or Proposal or to submit another Concept Paper or Proposal, select the appropriate solicitation (from the NYSERDA current funding opportunities page) and click the link to apply online.

- You can edit your contact information, attachments, and Concept Papers/Proposals prior to 3:00 p.m. ET on the date noted in the solicitation.
- Login with your NYSERDA Portal username and password credentials. If you have previously created an account, your username is your email followed by “.nyserda” (for example jsmith@gmail.com.nyserda). You must include the “.nyserda” or you will not be able to login to the system.

You will be asked if you would like to edit or create a new submission. Choose the appropriate selection.

YORK STATE

Search... Search Clark Kent

Home Projects Project Invoices Dashboards Manage Users SQA Schedule Inspection SQA Worklist

Multi Round Solicitation

Our records indicate that you have one or more existing records that for this solicitation. Before you proceed, please indicate whether you would like to make changes to an existing record or create a new submission.

Proposals - Would you like to make changes to an existing record?

| Action | Primary Contact | Proposal Title | Round | Proposal Budget | Status |
|----------------------|-----------------|---------------------------------------|---------|-----------------|--------------|
| | Clark Kent | The Power of Kryptonite | Default | \$500,000.00 | Under Review |
| Edit | Clark Kent | Kryptonite, the next Renewable Energy | Default | \$200,000.00 | Submitted |

OR

[CREATE A NEW SUBMISSION](#)

If you would like to create a new submission, click the “Create a New Submission” button and follow the steps previously noted in this guide to submit your Proposal/Concept Paper.

If editing a submission, click the edit link. (Depending on the type of solicitation, you may not have the ability to edit.)

After clicking the edit link, a home page will display. Using the page markers (circles at the top right of the page) you can navigate to the different steps of your Concept Paper or Proposal submission. Make edits as needed and click save. If you are updating attachments, upload directly to the appropriate location and the new document will automatically replace the old document. You are allowed one attachment per slot. If your document contains several parts, please consolidate into a single attachment and upload where appropriate.

Complete your submission/finalize the changes by pressing the “Submit” button on the last page of the NYSERDA Portal application.

The screenshot shows a web application interface for a 'Multi Round Solicitation'. At the top, there is a navigation bar with links for 'Home', 'Projects', 'Project Invoices', 'Proposal Review', 'Manage Users', and 'Dashboards'. Below the navigation bar, the application number '0000101478' is displayed. The main heading is 'Multi Round Solicitation', followed by a progress indicator consisting of six circles, with the last one being filled. Below this, the text 'Proposal Submission (Step 6 of 6)' is shown. A green success message states 'Success! Proposal has been submitted.' Below the message, a warning text reads: 'You are about to submit your concept paper to the Multi Round Solicitation. Concept papers will only be received up to 05/28/2020 at 03:00 PM. No Concept papers will be allowed to be submitted after this date and time.' At the bottom of the page, there are two buttons: 'PREVIOUS' on the left and 'SUBMIT' on the right. The 'SUBMIT' button is highlighted with a red rectangular border.

12 Invitation to Submit a Proposal Upon Concept Paper Approval

The following guidance is for solicitations where a Concept Paper is required before a proposal can be submitted. If you are notified that your Concept Paper has been approved and are invited to submit a full proposal, please review the following information.

- The contact who submitted the Concept Paper, will receive an email stating that the Concept Paper has been approved (if the Concept Paper was not approved, the contact will also receive an email stating such.)
- To submit a proposal (if your Concept Paper has been approved):
 - Click on the submission link provided in the Concept Paper acceptance email
 - Go to solicitation on the NYSERDA Current Funding Opportunity Page, click “Apply Online”

Please note: You must login to the NYSERDA Portal using the same email address/username from which the Concept Paper was submitted. Proposal submissions will not be successful if you log into the NYSERDA Portal from a different or new account.

Dear Nichole,

The New York State Energy Research and Development Authority (NYSERDA) has completed its review of your Concept Paper received in response to solicitation Test Solicitation. We are happy to advise you that your Concept Paper has been favorably reviewed by NYSERDA. As a result of a favorable review, you are hereby invited to submit a full proposal under the subject solicitation.

Please submit your proposal here: <http://uat-nysesda-portal>

Thank you.

NYSERDA

Do not reply to this email. This inbox is not monitored.


After logging into the NYSERDA Portal, you will be redirected to the intermediary page with the listed Concept Paper that you submitted. You now have the option to submit a proposal by clicking on the “Submit Proposal” link. If you previously started a proposal submission, there will be an option to edit.

Home Projects Project Invoices Proposal Review Dashboards Manage Users

Solicitation

Our records indicate that you have one or more existing records that for this solicitation. Before you proceed, please indicate whether you would like to make changes to an existing record or create a new submission.

Concept Paper - Would you like to make changes to an existing record?

| Action | Primary Contact | Proposal Title | Proposal Budget | Status | Result | Next Step |
|--------|-----------------|----------------|-----------------|--------|--------|---|
| F | | Ch... | \$78,000.00 | Closed | Pass | Submit Proposal  |

Proposals - Would you like to make changes to an existing record?

| Action | Primary Contact | Proposal Title | Proposal Budget | Status |
|--------|-----------------|----------------|-----------------|----------------|
| F | | 5000 | \$54,000.00 | Awarded |
| T | | Proposal Test | \$200.00 | Under Review |
| fa | | 56000 - 1 | \$5,600.00 | Pending Review |

OR

[CREATE A NEW SUBMISSION](#)

Application Number: 0000092382

Solicitation

Proposer Contact Information (Step 1 of 6)

Click "ADD A CONTACT" to provide information on contacts who will be involved in the proposed project.

[+ ADD A CONTACT](#)

| Action | Name | Email | Phone | Company Name | Primary |
|--|------|-------|-------|--------------|---------|
| Edit Clone | F | | | fam | Yes |

[PREVIOUS](#) [CONTINUE](#)

Complete all steps to submit your proposal:

- Add contact information
- Enter company and proposal information
- Answer checklist questions
- Upload proposal and any attachments
- Review all the information provided in the "Authorized Signature and Certification" step
- Check the box agreeing to the specified terms and conditions and click "Submit"

After the proposal has been reviewed, the primary contact will be notified via email whether the proposal has been awarded or not.

13 Troubleshooting

If you are having technical difficulties, please verify the following:

- You are using the most current version for Chrome, Firefox, or Internet Explorer (see section two—Getting Started for details.)
- The NYSERDA Portal is being accessed directly from the “Current Funding Opportunities” link on the NYSERDA website. You must click the “Apply Online” link for the specific solicitation you are applying/proposing to or that you wish to edit.
- Ensure that your username includes “.nyserda” after your email address as your username (for example `jsmith@gmail.com.nyserda`).
- The NYSERDA Portal closes promptly at 3:00 p.m. ET on the due date in the solicitation. Submissions that are in process, attempted edits, or new submissions at or after 3:00 p.m. ET on the due date in the solicitation, will not be accepted.

If you are still having technical difficulties with submission after troubleshooting, contact Contract Management, by email jsolicitation@nyserda.ny.gov; phone (518) 862-1090 x3418; or the program contact listed in the solicitation.

14 Tips to Optimize Large File Size

Microsoft Word, PowerPoint, and Excel

- Microsoft Word, PowerPoint, and Excel automatically optimize images inserted into a document. Adding images to a document, in most cases, reduces submission file sizes opposed to submitting them in their original format.
- To further optimize files with image content, saving a Word, PowerPoint, or Excel document as a PDF file may reduce file size.
- In Word, PowerPoint, and Excel—click on File, change the file format to PDF, and click Save.

Acrobat Pro

- Open the PDF Optimizer dialog box (File > Save As Other > Optimized PDF).
- Choose “Standard” from the Settings menu, and then skip to step 6. If you change any settings in the PDF Optimizer dialog box, the Settings menu automatically switches to Custom.
- From the “Make Compatible With” menu, choose “Retain Existing” to keep the current PDF version, or choose an Acrobat version. (The options available in panels vary depending on this choice.)
- Select the checkbox next to a panel (for example, Images, Fonts, Transparency), and then select options in that panel. To prevent all the options in a panel from executing during optimization, deselect the checkbox for that panel.
- Optional: To save your customized settings, click “Save,” and then name the settings.
- To delete a saved setting, choose it in the Settings menu and click “Delete.”
- When you are finished selecting options, click “OK”.
- In the “Save Optimized As” dialog box, click Save to overwrite the original PDF with the optimized PDF, or select a new name or location.

Note: To optimize several documents at the same time, use the Output options for the Actions Wizard.
Learn More at the Adobe website

Zip Files

- Compressing a single large file or multiple files using zip compression may decrease file size.
- On Windows and MacOS machines, you can right click on the file and locate the compress option.

15 Requirements for Paper Submission

NYSERDA will also accept Concept Papers and Proposals by mail or hand-delivery. If mailing or hand-delivering, proposers must submit two paper copies of their Concept Paper or Proposal with a completed and signed proposal checklist, along with a CD or DVD containing either a PDF or Microsoft Word digital copy of the concept paper or proposal. PDFs should be searchable and created by direct conversion from Microsoft Word or other conversion utility rather than scanning. Incomplete concept papers and proposals may be subject to disqualification. Mailed or hand-delivered Concept Papers and Proposals must be received and stamped prior to 3:00 p.m. ET on the due date listed in the solicitation. Late, faxed, or emailed Concept Papers or Proposals will not be accepted. It is the proposer's responsibility to ensure all pages have been included for submission. If changes are made to a solicitation, notification will be posted on the current funding opportunities page of NYSERDA's web site at nyserdera.ny.gov/Funding-Opportunities/Current-Funding-Opportunities. Concept Papers/Proposals will not be accepted at any other NYSERDA location other than the following address.

Mailed or hand-delivered concept paper or proposals must be clearly labeled and submitted to:

Proposals, PON/RFP XXX

NYS Energy Research and Development Authority

17 Columbia Circle

Albany, NY 12203-6399

In compliance with §139-j and §139-k of the New York State Finance Law (see Section V, General Conditions of the solicitation for additional information), additional forms must be completed and filed with paper Concept Papers and Proposals: a signed copy of the proposal checklist, including required certifications under the State Finance Law; and a completed Disclosure of Prior Findings of Non-Responsibility form. Failure to include a signed copy of the proposal checklist referenced in section 6 of this guide may disqualify your submission.

Concept Papers and Proposals should not be excessively long or submitted in an elaborate format that includes expensive binders or graphics. Unnecessary attachments beyond those sufficient to present a complete, comprehensive, and effective response will not influence evaluation. Each page of the concept paper or proposal should state the name of the proposer, the PON/RFP number, and the page number. The Concept Paper or Proposal must be in the format described in the solicitation.



NYSERDA

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Energy Research and
Development Authority**

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