



**THE BANK OF NEW YORK**  
240 GREENWICH STREET, NEW YORK, NY, 10007  
Request for Proposal for Interior Architectural Design Services  
(3<sup>rd</sup> and 4<sup>th</sup> Floor Redesign)

Prepared by



Issued October 29, 2025

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BNY will use reasonable efforts to protect legitimate trade secrets of any respondents. Specific attention should be given to the identification of those portions of Bidder's proposal which Bidder deems to be confidential or proprietary information reserved to BNY and JLL.



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## RFP for Interior Architectural Design Services

(3<sup>rd</sup> and 4<sup>th</sup> Floor Redesign)

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**October 29, 2025**

RE: Bank of New York, 240 Greenwich Street, New York, NY, 10007  
Request for Proposal for Interior Architectural Design Services (3<sup>rd</sup> and 4<sup>th</sup> Floor Redesign)

**Dear RFP Participant,**

On behalf of BNY, your firm is hereby invited to submit a Proposal for Architectural Design Services for the 3<sup>rd</sup> and 4<sup>th</sup> Floor at 240 Greenwich Street, New York City. The attached Request for Proposal (RFP) outlines the services that the Architectural firm will be expected to provide, as well as a description of additional information required.

**Project Overview:** BNY is redefining their market presence and workplace culture through the comprehensive redesign of the 3E, 4E, 3W, and 4W floors at 240 Greenwich Street. This transformation includes creating state-of-the-art trading operations on the east floors and innovative workplace environments on the west floors that align with BNY's corporate values. Both scopes involve demolition of existing spaces, modern design integration, pantry and ancillary support areas, while considering the building's architectural context to create a cohesive environment. KPF is leading the masterplanning of the building and will provide design oversight to ensure alignment with the broader building image. This project positions BNY as a flagship example of modern financial services infrastructure.

**NDA:** A reminder regarding the Non-Disclosure Agreement (NDA) that was signed prior to your receipt of the Request for Proposal (RFP). As you proceed with the RFP process, please remember to adhere to the confidentiality obligations outlined in the NDA.

**RFP Timeline:** Your response to the RFP shall be received in an email format no later than **5:00 PM on Friday, November 14, 2025**, at which time your Proposal will be reviewed and analyzed.

All questions and requests shall be communicated via email to Trevor Knebel ([trevor.knebel@BNY.com](mailto:trevor.knebel@BNY.com)) no later than **12:00 PM on Friday, November 7, 2025**. Please send questions itemized in a word document.

We look forward to receiving your proposal. Should you have any questions, please do not hesitate to contact us.

Sincerely,

Trevor Knebel  
Project Manager  
BNY  
[trevor.knebel@bny.com](mailto:trevor.knebel@bny.com)  
M +1 (917) 903-4407  
240 Greenwich St., New York, NY 10286



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## I. Project Team

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**OWNER / BNY**

Bank of New York

**PROJECT MANAGER:**

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**PROJECT LOCATION**

Bank of New York  
240 Greenwich Street, New York, NY, 10007

**OWNER / BNY**

Bank of New York

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## II. Project Description

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### Overview:

BNY is redefining their market presence and workplace culture through the comprehensive redesign of the 3rd and 4th floor work environments at 240 Greenwich Street, NY. The project creates state-of-the-art trading floors on the east side (3E/4E) and innovative workplace environments on the west side (3W/4W) that reflect BNY's values and commitment to banking excellence.

The design should be modern and professional, accommodating intensive market operations while creating forward-thinking workplace solutions. KPF is leading the building's masterplanning, and the selected architect must collaborate with KPF to ensure alignment with the broader architectural vision.

This transformation will establish environments that integrate advanced trading technology with collaborative spaces, positioning BNY as a flagship example of modern financial services infrastructure and progressive workplace culture.

JLL and BNY seek experienced consultants who will collaborate with BNY and KPF to deliver innovative design concepts through meticulous planning and attention to detail featuring:

- Clean, minimalistic design that is timeless and contextual to the building's architecture
- Strategic use of planning and materials that create a warm, inviting, dynamic environment
- Seamless integration of advanced trading and workplace technology
- Strategic integration of natural and artificial lighting solutions
- Alignment with BNY's corporate ethics and values •
- Full coordination with KPF's masterplanning and the greater vision of 240 Greenwich Street

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## III. Scope of Work

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**Scope:**

The following services are being solicited as part of this Request for Proposal (RFP) and any proposed fees, reimbursable expenses should reflect this level of involvement at a minimum for all requisite Architectural Services required for the project for:

1. Scope 1 – 3E and 4E Market Trading

- Demolition of existing 3E & 4E spaces
- Specialty Workplace (Market Trading)
  - State-of-the-art trading operations redesign
  - Collaborative market analysis spaces
  - Client-facing areas and high-tough hospitality experiences
  - Reception
  - Meeting Rooms
  - Phone Rooms
  - Office Suites
- Ancillary Support Space
  - Pantry
  - Copy Rooms
  - Coat Closets
  - Storage
  - Toilet Rooms
- General
  - Lift Lobbies
  - Lift Bridges

2. Scope 2 – 3W and 4W

- Demolition of existing 3W & 4W spaces
- Progressive Banking workplace design
  - Meeting Rooms
  - Collaborative Spaces
  - Meeting Rooms
  - Phone Rooms
- Ancillary Support Space
  - Pantry
  - Copy Rooms
  - Coat Closets
  - Storage
  - Toilet Rooms

The following outlines the requirements for services required for this project. However, it is anticipated that needs beyond these descriptions may be required from time to time. The scope for Architectural Services has thus been broken down as follows:

The Architectural firm selected for this strategic project will provide Architectural services as outlined below:

- Architect is to complete Programming; Schematic Design, Design Development, Construction Documentation, Signing and Sealing of documents for filing, Construction Administration, Project Closeout and other services outlined below.
- Architect is required to collaborate and coordinate with KPF throughout the design process to ensure alignment with the broader building image and masterplan.
- Architect shall retain and manage all necessary consultants (MEP, Acoustics, Lighting) AV/ IT consultants will be held under BNY.



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- Design shall comply with all Federal, State and Local laws and codes as well as meet the requirements of all other authorities having jurisdiction.

The scope of work, at a minimum, shall include all points listed below:

- Full Architectural design and thorough coordination with all consultants. Deliverables are expected as below:
  - o Meeting notes for all BNY and Consultant coordination meetings
  - o Programming report
  - o Test-fits for signoff
  - o 50% DD, 100% DD + Page turn
  - o 50% CD + Page turn
  - o 90% CD + Page turn
  - o Issued for Bid + Addenda as needed
  - o Issued for Construction Filing to DOB + PAAs as needed
  - o Issued for Construction + Bulletins as needed (Add services will be accepted for BNY scope changes only)
    - Includes fully coordinated responsibility matrix for Appliances, Technology scope responsibilities to ensure no scope gaps
  - o FF&E packages for Bid with Pricing Bid form sheet
  - o Observation Field reports
  - o Punch lists (Above the ceiling punch list, Close out punch list and 3 follow up visits)
  - o Design record set
  - o Furniture record set (with tagged plans, finishes, warranties, cleaning specifications)
- Meetings:
  - o Attendance at weekly OAC / project meetings for the duration of the project (Majority to be virtual during Design, Bidding; In person during construction)
  - o Architect is required to present design deliverables to BNY for review and approval at the completion of each design phase before proceeding to the next phase.
  - o Attendance at a joint Consultant coordination meeting (1 weekly call with all consultants and JLL for duration of the project)
  - o Other consultant coordination calls as needed to ensure thorough coordination
  - o Regular bi-weekly meetings with KPF & BNY for design collaboration through design phases of project
  - o Attendance at change order review calls
- Regular CA visits and reports (Architect is expected to start an observation report and update the report as needed at a minimum once every 2 weeks of construction)
- If the BNY chooses to not pursue LEED or WELL certification, there will be certain best practice design elements from LEED and WELL standards that are to be incorporated into the design. Coordination with JLL's or BNY's Sustainability team will be as needed throughout all phases.
- Coordinate with JLL's Sustainability team for LEED certification requirements (Certification related fees to be separated on bid-form).

## **DESIGN PHASE 1: TEST FITTING**

Project Initiation:

- Conduct a preliminary survey to obtain model in REVIT and drawings in CAD.  
Conduct a site survey to confirm site measurements and existing conditions and dimensions

Visioning:

- Conduct an initial visioning session with key BNY/JLL stakeholders to gather insights and confirm project goals and objectives.
- Establish a clear understanding of the BNY/JLL's needs, preferences, and challenges related to the workspace.

Programming:

- Develop a comprehensive programming document that outlines the specific requirements for each business unit/department, including:
  - Space requirements (private offices, open workstations, meeting rooms, etc.)
  - Special needs (e.g., storage, filing systems, IT infrastructure)
  - Circulation patterns and adjacencies between departments
  - Amenities and support spaces (e.g., break areas, collaboration zones)
  - Distribute a BNY/JLL questionnaire to staff to verify and refine program requirements.
  - Conduct tours of existing facilities to document and assess current conditions, including furniture, equipment, and technology needs.
- If applicable, tour existing facility(s) to document and inventory all necessary program requirements including, although not limited to filing, storage, furniture, specialty equipment, electrical, plumbing, telecommunication and IT.
- Subsequent to the above, work with the Project Team to confirm and define a detailed program for other disciplines tied to the program. This program shall include although not limited to confirmation of the following:
  - Pantry requirements
  - Amenities requirements
  - Storage / file requirements; Back office requirements
  - Ancillary space requirements
  - Circulation and other core areas
  - Telecom / data rooms (with assistance of project engineer)
  - Specialty Mechanical (HVAC, plumbing, fire protection) system requirements (with assistance of project engineer)
  - Specialty Electrical system requirements
  - Specialty Life-Safety system requirements
  - Specialty security system requirements
  - Lobby receptionist security requirements
  - Specialty Telecom / Data system requirements (with assistance of project engineer)

#### Coordination and Collaboration:

- Collaborate with the project team, including consultants and stakeholders, to ensure that the programming and stacking plans are aligned with overall project objectives and site conditions.
- Facilitate meetings to discuss findings, gather feedback, and make necessary adjustments to the programming and stacking documents.

#### Documentation:

- Provide a comprehensive design schedule to track all milestones required for coordination with consultants and to complete documentation.
- Compile all programming information into a cohesive document that serves as a reference for design development and decision-making.
- Present the final programming documents to the BNY/JLL and stakeholders for approval, incorporating their feedback.
- Prepare test-fits and obtain client approval on preliminary test-fit.

#### CONSULTANT-COORDINATION AND COLLABORATION:

- Ensure ongoing communication and collaboration between the architect and the onboarded consultants to integrate their designs into the overall project seamlessly.
- Schedule regular coordination meetings to track progress, address challenges, and facilitate information sharing among team members.
- Monitor the work of the consultants to ensure compliance with project requirements, timelines, and quality standards.
- Address any issues or discrepancies that arise during the design and implementation phases.
- Compile all relevant documentation, including contracts, meeting notes, and progress reports, to maintain a clear record of consultant engagement and project developments.
- Provide regular updates to the BNY/JLL regarding the status of the consultants' work and its integration into the overall project.

## **DESIGN PHASE 2: SCHEMATIC DESIGN**

### Schematic Design Phase:

- Using the approved program information and adjacency requirements obtained from the Programming Phase, along with the block plan / test fit as a guide, prepare a Schematic Plan for review and comment.  
Prepare alternative design directions; assume three (3) for review by BNY before final Schematic Plan approval.  
Each color-coded (by function or group) Schematic Plan shall include:
  - General functional relationships and adjacencies for all spaces within the program.
  - Pertinent program information noted on all plans to indicate requirements met, program deficiencies, and excess space if applicable.
- Review existing conditions to identify and document any discrepancies or other findings, including general field dimensions and conditions, system capabilities, location of critical infrastructure components.
- Coordinate with and document information gathered from shared services, consultants and vendors in design team.
- Conduct product research for architectural materials and finishes. JLL will value selection of materials that are environmentally friendly.
- Present documents to BNY/JLL stakeholders; obtain comments and make revisions as required to secure approval.  
Formal Presentations may be required for presentation to the Executive Group.

### Comprehensive Renderings:

- Create high-quality 3D renderings and visualizations to effectively communicate design intent and facilitate decision-making. This includes:
- Interior renderings illustrating spatial arrangements, finishes, and furnishings.
- Utilize advanced rendering techniques (e.g., photorealistic rendering, virtual reality) to present an immersive experience of the design.

### Compliance and Sustainability:

- Ensure that all programming and solutions meet relevant building codes, zoning regulations, and accessibility standards (e.g., ADA compliance).
- Integrate sustainable design principles into the programming process to enhance energy efficiency and reduce environmental impact.

## **DESIGN PHASE 3: DESIGN DEVELOPMENT**

### Design Development Phase:

- Build upon the approved Schematic Design to refine architectural concepts and detailed specifications for the project.
- Collaborate with the BNY/JLL and key stakeholders to ensure that the design aligns with their vision, requirements, and budget.
- Assist with the furniture coordination and incorporate into architectural plans.
- Coordinate Design with all stakeholders, AV/IT, Security, FA, etc.
- Obtain user approval of electrical outlet plan and equipment plan prior to completion of design development phase.
- Coordinate and assist with pricing of the documents. Include Page-Turn with all stakeholders.
- Participate in value analysis work session(s) as required. Make appropriate revisions to documents.
- Coordinate with and document information gathered from shared services, consultants and vendors in your work.
- Prepare material sample options for informal presentation and discussion. Review with JLL for preliminary comments.
- Make recommendations regarding potential pre-purchase packages and early release of any anticipated long lead materials.
- Develop comprehensive design documents that include:
  - Floor plans detailing layouts, dimensions, and spatial relationships.
  - Elevations illustrating the exterior appearance and materials.
  - Sections highlighting critical building components and relationships between spaces.



- o Details for architectural elements such as millwork, fixtures, and finishes.

#### Comprehensive Renderings:

- Create high-quality 3D renderings and visualizations to effectively communicate design intent and facilitate decision-making. This includes:
- Interior renderings illustrating spatial arrangements, finishes, and furnishings.
- Utilize advanced rendering techniques (e.g., photorealistic rendering, virtual reality) to present an immersive experience of the design.

#### Design Iterations and Feedback:

- Present the design development documents and renderings to the BNY/JLL and stakeholders for review and feedback.
- Facilitate design review meetings to discuss proposed changes and incorporate stakeholder input into the design.
- Provide multiple design iterations as necessary to ensure alignment with BNY/JLL expectations and project goals.

#### Material and Finish Selection:

- Assist the BNY/JLL in selecting materials, finishes, and furnishings that align with the design vision and functional requirements.
- Prepare material boards and samples for presentation and review, ensuring that selections are consistent with the overall design aesthetic.

#### Coordination with Consultants:

- Collaborate with engineering and specialty consultants to integrate building systems (e.g., mechanical, electrical, plumbing and other) into the design.
- Ensure that all design elements comply with relevant codes, regulations, and industry standards.

#### Sustainability Considerations:

- Incorporate sustainable design principles into the design development process, such as energy efficiency, materials selection, and environmental impact reduction.
- Coordinate with the sustainability team to ensure compliance with LEED or sustainability standards as applicable.

#### Final Documentation and Approval:

- Compile all design development documents, including renderings, specifications, and material selections, into a cohesive presentation for final review.
- Secure BNY/JLL and stakeholder approval of the design development package to proceed to the next project phase.

#### Communication:

- Provide regular updates to the BNY/JLL and project team regarding design progress, challenges, and milestones.
- Provide BNY with clear decision requirements and target dates to track deliverables from BNY and vice versa
- Maintain open lines of communication to address any questions or concerns throughout the design development phase.
- This scope of work aims to ensure a thorough and collaborative design development process, resulting in comprehensive renderings that facilitate informed decision-making and reflect the BNY/JLL's vision.

### **CONSTRUCTION DOCUMENTS**

- Coordinate with approved vendors to develop specifications for audio/visual requirements and infrastructure, telecommunications and data and voice cabling requirements etc. for incorporation into Construction Documents.
- Based upon approved Design Development materials, as well as other information which may be provided by BNY/JLL, develop comprehensive construction drawings and specifications as required for obtaining all permits, contractor bidding and construction including as a minimum the following
  - o General Information Drawings - Prepare general information drawings indicating items such as: project team list, building summary, sheet index, building department notes, code analysis, abbreviations (construction industry standards), disabled access requirements, legends, and symbols (graphic).

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- Floor Plans - Plans drawn at an architectural scale (1/8" scale min) indicating type of partitions and locations (dimensions), doors and frames numbered and referenced to a schedule, location of plumbing fixtures and architectural millwork. Areas designated to receive special construction (i.e., structural reinforcing or floor cutouts) shall be indicated and referenced to the appropriate engineering drawings. Plans / specifications should include demolition of the existing installations where required. All construction layouts, elevations and details to be fully coordinated with all consultants, including BNY's IT team.
  - Telephone/Electrical Plan- Designate the type and location of telephone, data and electrical outlets required. Outlets will be designated as floor or wall mounted. Locations of all standard (faxes, printers, computers, etc.) and special equipment (i.e., copiers, appliances, shredders, etc.) will be numbered and referenced on an equipment schedule. All outlets will be dimensioned as required and indicated specifically for use with equipment and furniture configurations. Coordinate all security and AV requirements with security and AV vendors and indicate infrastructure and equipment on plans accordingly. Prepare and incorporate into work all electrical requirements for proposed security and AV equipment, data systems, voice systems, etc.
  - Reflected Ceiling Plans - Include the type and dimensioned location of light fixtures, switches, thermostats, exit signs, special HVAC diffusers and ceiling mounted electrical junction boxes, extent of all ceiling types, along with any special soffit conditions or access panels.
  - Finish Plans - Designate the type and location of the finishes that will be applied to both the partitions and floors. Flooring pattern alternatives shall be reviewed and approved by JLL. Finishes such as wall covering, paint, carpet, wood panels (species), etc. will be specified in a finish schedule. Special finish items such as window coverings will be indicated on this plan.
  - Enlarged Plans - Create enlarged plans and details of special areas such as, but not limited to: reception/conference rooms, pantries, computer equipment rooms and toilet rooms to indicate critical dimensions, details and special requirements.
  - Elevations - As required, prepare elevations at the same scale as floor plans indicating the height and configuration of wall materials and elements such as finish floor, finish grade, windows, doors and other openings.
  - Wall Sections - Prepare enlarged wall sections indicating structural systems, wall and floor. Indicate roof/floor structure beyond and HVAC ductwork to ensure coordination of these systems and corresponding ceiling heights.
  - Details - Details of the assembly and configuration of all building materials and assemblies such as partitions, soffits, ceilings, millwork, security desk and special design elements.
  - Engineering Drawings- Coordinate as required with project team. Plans shall utilize architectural documents as their base.
  - Furniture Plans- Include the specific dimensions, location and configuration of furniture with critical dimensions that must be maintained for building code compliance designated on the plans. These plans will include a Systems Furniture Panel and Component Plan and Systems Furniture Electrical Plan, as coordinated with the furniture systems dealer(s). Prepare any supplemental documents required to indicate placement and quantities of re-use or new FF&E.
  - Equipment Plans- Include the specific dimensions, location and configuration of all equipment with critical dimensions that must be maintained for building code compliance designated on the plans. These plans will include the name of the equipment and all infrastructure requirements. Obtain JLL's approval of equipment plan.
  - Specifications- Incorporate technical specifications within construction documents for all items of work included in design team drawings.

- Cost Estimates and Value Engineering - Assist the project team in the preparation and update of all cost estimates for the project including all construction, millwork, architectural finishes, furniture and related work. The cost estimate will be subject to review and approval by BNY/JLL in accordance with previously established budget parameters. If budget parameters are not met, Architect is responsible for value engineering at no additional cost, with involvement of JLL, and revising drawings accordingly to bring project within budget.

Review Progress documents with program. Identify discrepancies.

Prepare 50% progress set for review. Prepare final set for JLL's review, approval and for Construction. Include Page-Turn with all stakeholders.

Participate in value-analysis work session as required. Make appropriate revisions to documents.

Present documents to BNY, JLL, and other stakeholders as required securing approval.

#### **FURNITURE SCOPE**

- During Design Development, prepare furniture plan, which will be transmitted to furniture dealers for their preparation of a more detailed plan.
- Prepare a Furniture Package presentation for BNY review to include options for all ancillary furniture to be used in the space. Architect shall include alternates where applicable.
- Coordinate with furniture vendors and provide guidance on order placement deadlines based on expected lead times and the overall project schedule. All furniture changes should be clearly marked and documented in a detailed change log for easy identification of revisions. These changes must be reflected in both Furniture and Architectural drawings, with updated plans shared with the team. Additionally, prepare a spreadsheet to verify areas designated for relocation and ensure all outstanding tasks are completed at least two weeks before the move date. Confirm network drops and electrical outlets for printers and other equipment according to the plan.
- During Construction, conduct inspection on-site during the installation of furniture, to ensure proper coordination and to assist BNY as required.
- Conduct progress review of installation, issue observation/punch list as application and conduct up to 3 rounds of reviews to ensure completion and sign-off.
- Architect to prepare a final record package of the design and collaborate with the furniture dealer for warranties, cleaning specification and records of finishes.

#### **BNY FM REVIEW, BIDDING and DOB PERMITTING**

- BNY FM review: Architect is responsible for collating all Architect and consultant drawings for JLL, BNY FM review (electronic and hard copy) and responding to Building Facilities drawing review comments and updating drawings accordingly.
- Bidding: Architect is responsible for collating all Bid documents from all consultants and issue to JLL or Construction Manager for Bidding.  
Architect is responsible to assist with questions/RFIs during the bid process. Architect to collate all responses to bidder RFIs, including the associated sketches, required Addenda and issue to the Construction manager.  
Architect will be responsible to assist on the bid and negotiations with subcontractors and vendors, including bid analysis, and review of specification packages and site visits if necessary with select bidders.  
Architect to review all leveled bid responses for compliance with bid set and flag any discrepancies from the bid set.
- Permitting: Submit complete construction documents to the appropriate agencies for plan check and all applicable permits. Make any revisions to the plans as required to obtain final Agency approval and all permits.

#### **CONSTRUCTION ADMINISTRATION**

- Review as required all contractor and consultant submittals of shop drawings, product data and finish samples.
- Coordinate the work of all consultants and vendors with your work. Coordinate information from others as required ensuring a comprehensive and coordinated set of documents.

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- Respond to contractor requests for information (RFIs), prepare formal document changes as required to address constructability issues
  - Visit and tour the project premises as required during construction in order to generally monitor progress of the work (minimum one (1) visit per week). During visits to the Project site, verify conformance with Construction Documents. Prepare Field Visit Reports.
  - Attend and administer engineer, consultant, vendor and contractor work sessions as required to resolve construction and design issues.
  - Conduct shop visits during fabrications of custom design elements – millwork, lighting, specialty glass, ornamental metal, signage, custom furniture, etc.
  - Review and approve Construction Requisitions.
  - When construction is significantly complete, host a punch list walk and prepare a punch list of items requiring correction or modification. Assess and monitor the punch list until completion of the work by the contractor(s). Punch lists will be separate for the phased construction.
  - Assist contractor in obtaining certificate of completion.
  - Review project conditions and assist construction team in resolving issues as required to commence occupancy phase.

#### **PROJECT CLOSEOUT SERVICES**

- Following construction completion, prepare separate punch lists for construction, signage, furniture and anticipate 3 follow up visits each to close open items.
- Record set: Preparation of a record set of construction drawings representing all revisions and field conditions related to the project's architectural scope of work. Refer to Exhibits G1, G2 for requirements.  
Prepare a package that include the following information:
  - Plans of construction documents, furniture plans, and signage room number plans
  - Specifications of all Materials (Architectural)
  - Specifications of all Materials (Furniture)

#### **LEED CERTIFICATION (Provide fee for certification process as Add-service)**

- a. Self-Work with design team and Client to establish LEED project goals and targets and assist on input.
- b. Assist Client and LEED consultant with criteria for sustainable design
- c. Attend meetings with the design team, Client and LEED consultant to review and verify suitability of proposed design, materials and equipment, and constructability and sustainability thereof.
- d. Attend LEED workshops and meetings held by LEED consultant.
- e. Design MEPS systems in compliance with LEED project goals. Perform associated studies, calculations, material evaluations, etc. required to support compliance.
- f. Prepare design documents to demonstrate LEED compliance for MEPS engineering related LEED credits. Please see attached LEEDv4-WELLv2\_Architect PDF for additional details on credit responsibilities..
- g. Perform calculations, specify materials and equipment, and review construction submittals associated with MEPS engineering related LEED credits.
- h. Incorporate environmentally preferable products and LEED criteria into design and specifications.
- i. Perform calculations for MEPS engineering related LEED credits. Initial LEED calculations are to be updated during design phases to assure that the project will obtain the necessary points for the LEED rating goals.
- j. Prepare MEPS engineering related LEED credit documentation and specifications for submission to the United States Green Buildings Council (USGBC).
- k. Submit designated credits to the USGBC under the direction of the LEED consultant.
- l. Work with the LEED consultant and Construction Manager to ensure that specified products comply with LEED requirements through submittals and Requests for Information.
- m. Work with the LEED consultant and the Construction Manager to ensure that materials and equipment are installed and properly tracked throughout the construction process.

## **ADDITIONAL SERVICES**

- 1- CCD1: Filing of CCD1, if required.
- 2- Public Assembly+Alt1 filing: Provide add alternate fee for filing of Public Assembly+Alt1 Application, if required on the project.
- 3- Additional Weekly Construction Administration: Provide add alternate fee per week if the Construction schedule is extended for CA phase.
- 4- Floor Survey of existing premises: Preparation of a detailed field survey of the existing premises which shall be translated into an existing condition plan in the event that no existing conditions plan is available.
- 5- Pre-purchase package: Preparation and issuance of the construction documents for the purpose of pre-purchase
- 6- Additional filing package: Preparation of separate demolition filing package for each project.
- 7- Preparing and issuance of RFP, Onboarding and contracting with consultants: Collaborate with the BNY/JLL to define the project scope, objectives, and budgetary constraints for the selection of additional consultants, including an acoustician, lighting designer, signage designer and any other applicable specialists.
  - Drafting the Request for Proposal (RFP): Develop a comprehensive RFP document that includes:
    - Project overview and background information
    - Scope of work and specific services required from each consultant
    - Deliverables and expected outcomes
    - Project schedule and timeline for consultant engagement
    - Submission requirements and evaluation criteria
    - Budget parameters and fee structure guidelines
    - Ensure that the RFP aligns with the overall project goals and BNY/JLL expectations

### Issuing the RFP:

- Distribute the RFP to a curated list of qualified consultants, including acousticians and lighting designers, ensuring a diverse pool of candidates.
- Manage inquiries from potential respondents and provide clarification as needed throughout the RFP process.

### Proposal Evaluation and Consultant Selection:

- Establish a selection committee with key stakeholders to review and evaluate submitted proposals based on pre-defined criteria, including experience, qualifications, approach, and fees.
- Conduct interviews or presentations with shortlisted consultants to further assess their capabilities and fit for the project.
- Make recommendations for consultant selection to the BNY/JLL based on the evaluation process.

### Onboarding Selected Consultants: Coordinate the onboarding process for the selected consultants, including:

- Formalizing contracts and agreements.
- Providing project background, design requirements, and context to ensure alignment with the overall project vision.
- Establishing communication protocols and collaboration tools for effective integration into the project team.
- Facilitate an initial kickoff meeting with the BNY/JLL and all consultants to outline roles, responsibilities, and project timelines.

- 8- Lighting Design Consulting services: Provide recommendations of 2-3 bidders and fee for each.
- 9- Acoustical Consulting services: Provide recommendations of 2-3 bidders and fee for each.
- 10- Contracting with consultants: Provide markup fee for holding consultant contracts (including but not limited to MEP Engineer, Lighting Designer, Acoustician, Signage designer)
- 11- Accessibility compliance: Provide a fee for review of the entire building stack for accessibility compliance. A report is to be submitted after review of the site.



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**Contract**

The contract between BNY and the Architect may be a BNY Agreement format or a Standard AIA contract.

The Architect shall be responsible for the comprehensive coordination of all consultants engaged in the project, regardless of the contractual relationships those consultants may hold with either the client or the Architect. This includes, but is not limited to, ensuring that all design, engineering, and specialty consultants are working collaboratively and in alignment with the project objectives.

In the event of significant coordination errors that lead to errors and omissions, the client reserves the right to pursue claims against the Architect for any resultant impacts. It is imperative that the Architect implements effective communication and project management strategies to mitigate the risk of such errors, ensuring that all team members are aligned and informed throughout the project lifecycle.

The Architect shall provide regular updates on coordination efforts and address any discrepancies or conflicts promptly to maintain the integrity of the project and uphold the highest standards of professional practice.



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## IV. Evaluation Criteria

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**Experience, Expertise, Best Value:**

The selected firm will be the one that demonstrates the experience and required expertise. Cost will be a determining factor in the selection of the Architectural Design firm for the project but will not be the sole determining factor. The firm that demonstrates the best value to BNY will be selected.

**Project Team:**

A major focus of this RFP is to find a team with experience who can efficiently assist the JLL and BNY in meeting the goals of this project.

**Project Schedule:**

BNY aims to select a service provider who demonstrates ability to meet project milestones and schedule and will be evaluated on value, efficiency and the ability to meet the programmatic and operational requirements within budget and on schedule.

**Processes and efficiencies:**

BNY aims to select a consultant who can make recommendations to improve processes and assist in driving cost reductions for BNY. In a competitive market, cost is always a factor, and value-driven decisions and value-based design solutions must be made. In the current economy this is especially true.

**Quality/Service Assurance:**

BNY aims to select a firm who can provide high levels of quality service and customer satisfaction.

**Award of Contract**

JLL will notify the bidder in writing of the award. The consultant will execute the work in accordance with this proposal as accepted.



## V. Response Protocol

Your response to the RFP shall be received in an email format no later than **5:00 PM on Friday, November 14, 2025**, at which time your Proposal will be reviewed and analyzed.

BNY is interested in securing the services of a firm which best satisfies all their requirements and who is the most qualified. It is understood and agreed upon that JLL reserve the right to award the contract in BNY's best interest, to accept or reject any and all proposals, and to waive any formalities in the bidding process.

All questions and requests shall be communicated via email to Trevor Knebel no later than **12:00 PM on Friday, November 7, 2025**. Please send questions itemized in a word document.

### RFP Schedule

Activity	Date
RFP Release	October 29, 2025
Follow up questions must be submitted by e-mail to JLL	November 7, 2025
Responses to the follow up questions due	November 12, 2025
Proposals due	Email submission: November 14, 2025
Interview	November 20, 2025; November 21, 2025

**The above schedule may be modified by JLL or BNY at its discretion.**

RFP responses must be submitted in an organized manner, each copy should address distinct sections as listed in the Proposal format below. All RFP responses should have consecutively numbered pages.

### Proposal Format:

In an effort to keep the proposals at a concise level to facilitate review, we have determined an overall document size guideline. Please maintain a Fifteen-page limit on the body of the proposal. Any additional information necessary in your submission should be presented in an Appendix. The proposal shall be organized according to the outline give below:

1. Table of Contents

2. Title Page

The title page should clearly state:

Company Name:

Address:

Direct phone #:

Fax #:

E-mail address:

In its notice of intention, Bidder will identify an individual who will be the single point of contact for JLL throughout the engagement, and who will have the authority to make decisions on all matters relating to the Bidder's performance of this Scope of Work. All correspondence will be directed to the point of contact that Bidder shall reference below, unless subsequently indicated in writing by Bidder.



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Name:  
Direct phone #:  
Fax #:  
E-mail address:

3. Firm information

Provide tabulated response as requested below. The data is to also be outlined in Exhibit A Bid form in excel format.

Firm Legal Name:	
Primary office location:	
Firm size:	
Firm size at New York location:	
Woman/Minority ownership status (WBE/MBE) if applicable:	
Firm diverse employment statistics:	
Other office locations:	
Firm Overview: Provide additional information including its history, size, areas of expertise <i>If preferred, provide more information via an Exhibit in Appendix to support your response.</i>	
List of major or key United States and New York projects: <i>If preferred, provide more information via an Exhibit in Appendix to support your response.</i>	
References: Provide a list of 3-5 references from previous BNYs who can speak to the quality of your work, professionalism, and ability to meet deadlines.  Include the name, address, telephone number and e-mail address of a verified contact person.	
Separation: State any previous customer and provide the reasons for and date of separation. References may or may not be reviewed or contacted at the discretion of JLL reserves the right to contact references	



other than, and/or in addition to, those furnished by the Bidder.	
Provide a comprehensive list of any lawsuits or legal actions that your firm has been involved in and outcome:	

**4. Organization and Staffing**

Within this section, identify the members of the proposed contract team, their roles and responsibilities and the percentage of time that will be committed by each member throughout this engagement. Please insert a table to include names of team members on the project and their roles and the Hourly rates for each. The number of hours/days spent by the team members on the project to be outlined in the Exhibit-A Bid Form.

Please make us aware of any other projects the team members will be involved with concurrent with this project. Identify any professional affiliations or certifications held by members of the proposed team.

Provide an organizational chart for the proposed team, showing lines of authority up to and including the executive management level.

*Resumes of team members to be attached as an Appendix separately with Proposal.*

**5. Insurance and bonding**

See Exhibit C for minimum Insurance requirements for the project. Provide your firms' insurance carrier and agent information. Include contact names and phone numbers. Please outline the insurance limits that your firm carries.

**6. Agreement to the Scope and Schedule**

Provide us with your confirmation and agreement of the Scope of work outlined in the RFP-Section IV and Addenda (if any) and Project Schedule outlined in the RFP-Section III.

If necessary, please insert content of the Scope from this RFP with no exclusions, Schedule and a copy of Exhibit B (Acknowledgement form) in this section.

**7. Fee for Basic Services:**

Bidders should refer to Exhibit A - Bid Form to provide pricing information. Please use the format provided so that JLL will be able to compare and analyze pricing for each bidder. Attach the Bid form to this Section of your Proposal and also attach the form in Excel along with your proposal.

Via the Bid Form A, you will be able to provide:

- A breakdown for the services listed in the scope description, along with a total lump sum price.
- An estimate of project reimbursable expenses.
- A schedule of hourly rates. It must contain the rate(s), job titles or classifications included in this project, complete with their associated ranges of actual hourly rates and proposed markups for all overhead, including but not limited to payroll taxes and insurance. Rates of pay shall remain firm for the duration of the project. Rates shall be used to monitor not to exceed contracts and/or change orders.

In this section, please attach a list of Additional Services provided by your firm/company along with relevant rates.

**Note: The description used in Sections II, III along with the Exhibits, Bid form will be used in generating the SOW to the contract. Please exclude T&Cs in your proposal response.**

**Attached Exhibits:**



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## **Exhibit A – Bid Form**

*See attached.*

After reviewing all of the information provided in the Request for Proposal and the associated Exhibits, submit the fee proposal in the format attached.

The Base Fee must cover the complete scope of work outlined in the RFP with no exclusions and any forthcoming addenda (if any). Scope of work not outlined in the proposal to be reflected in the list of Additional Services in the proposal. The fee quoted should include Sales Tax (show as separate line item). The base fee must include costs associated with any relevant insurance and invoices are not to be marked up further for any additional charges.

The base fee or any fees quoted must include in house expenses (printing for projects, phone calls, faxes, meals etc.).

Reimbursable expenses quoted separately on the bid-form may be claimed for expenses:

- Subway fares (only) to and from project meetings. Taxi fares will be considered for transportation of materials or similar reason.
- Printing expenses incurred for submission of drawing sets issued to the Expeditor/Building Management/JLL, prints for presentations, or bound sets to the BNY upon request.  
All other internal expense should be accounted for in the base fee and should not be expensed as Reimbursable expenses.
- Reimbursable expenses are to be expensed without any markups. All back up to be provided for reimbursable expenses with accurate indication of the expense.

Please attach this Exhibit as recommended in the Response Protocol and also submit this Exhibit in Excel format (Please do not alter the format of the Bid Format).

## **Exhibit B – Acknowledgment Form**

*See attached.*

## **Exhibit C – Indemnification and Insurance Requirements**

*See attached.*

## **Exhibit D – Building Rules and Regulations (Extract) – *Revision expected Sep/Oct 2024***

*See attached.*

## **Exhibit E – BNY Preliminary Schedule**

## **Exhibit F – Current Floor Plans (3<sup>rd</sup> and 4<sup>th</sup> Floor)**

*See attached.*

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# **VI. Terms of the RFP**

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## 1. Confidentiality

This RFP contains BNY, Inc. (BNY) proprietary and confidential information that is provided to Bidder for Bidder's exclusive use in evaluating and preparing a



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written proposal. This document should not be duplicated except as necessary to prepare Bidder's response. This document should not be disclosed or distributed to any third party without the express written consent of BNY or Jones Lang LaSalle (BNY).

All copies of this document except one (1) file copy should be destroyed following submission of Bidder's response or notification of a non-response. The file copy should be held confidential and not used for any purpose other than response preparation and subsequent discussions with BNY, if any result. Bidder should safeguard the confidentiality of this document and any copies with the same degree of care with which Bidder would safeguard Bidder's own confidential information. Selected candidates will be expected to sign a mutually acceptable "Confidentiality Agreement" that confirms acceptance of these stipulations, but all respondents and non-respondents should indicate their agreement to this paragraph in their response to this RFP.

BNY will use reasonable efforts to protect legitimate trade secrets of any respondents. Specific attention should be given to the identification of those portions of Bidder's proposal which Bidder deems to be confidential or proprietary information reserved to BNY

2. Terms and conditions of the RFP      All proposals and any other material submitted in response to this RFP will become the property of BNY

Acceptance of a proposal does not commit BNY or JLL to award a contract to any Bidder, regardless of whether or not the proposal meets all the requirements stated in this RFP, nor does it limit BNY's right to negotiate in its best interests.

BNY reserves the right to reject any or all proposals and price quotations received for any reason whatsoever. Neither the receipt of any proposal, nor failure to reject any proposal shall impose any legal obligation on BNY

BNY reserves the right to select and negotiate with those companies it deems qualified for competitive bidding and to terminate negotiations at any time without incurring liability.

BNY reserves the right to enter into discussions and/or negotiations with one or more qualified Bidders at the same time.

BNY reserves the right to terminate the entire RFP process at any time without incurring any liability.

Bidder is not authorized to assign this RFP to any other entity without BNY' or JLL's prior written approval. Subconsultants, if any, must be clearly identified in the financial proposal.

Mandatory requirements, notices, and other critical information shall be designated as such and shall be displayed in this format.

Noncompliance with timelines, mandatory requirements or other critical elements will cause Bidder disqualification from this RFP.

If a Bidder is unwilling or unable to meet any RFP requirement, an explicit statement to that effect must be made in the proposal as an exception.

3. Exclusivity      BNY reserves the option to deal with more than one Supplier/Consultant in a region. BNY has no desire to become Supplier/Consultant's only customer, nor does BNY promise to place 100% of its requirements with one Supplier/Consultant.
- Any projections included in this RFP or within subsequent projects or orders are non-binding. All or part of the Bidder response and this RFP will be incorporated into a Supplier/Consultant contract if one results, at BNY's sole discretion.
4. Product substitution      All items or services delivered during the life of the contract shall be of the same type and manufacturer as specified or accepted as part of the proposal unless specific approval is given by BNY to do otherwise.
- Awarded firms are encouraged to offer any like substitute product(s), either generic or brand name, at any time during the subsequent contract term, especially if an opportunity for cost savings to BNY exists. In all cases, BNY may require the submission of written specifications and/or product samples for evaluation prior to any approvals being granted.
5. Quantities      Bidder's attention is called to the fact that, unless stated otherwise, the quantities given in the proposal are best estimates and are given as a basis for the comparison of the proposals.
- Quantities ordered may be increased or decreased by BNY as deemed necessary during the period of the contract.
6. Incurred proposal expenses      Bidder shall be responsible for its costs of preparing and responding to this proposal and shall not be compensated for labor or materials costs.
7. Jones Lang LaSalle roles and responsibilities      Jones Lang LaSalle is the Owner's Representative and Project Manager representing BNY on their build-out projects specified in this RFP.
8. Timing of the Validity of Proposals      This proposal shall be valid for a period of 120 days from the proposal date and may not be withdrawn once submitted.
9. Silence of Specification      The apparent silence of the specifications as to any detail, or the apparent omission from it of a detailed description concerning any point, shall be regarded as meaning that only the best commercial practice is to prevail and only material and workmanship of the first quality are to be used.  
Proof of specifications compliance will be the responsibility of the Bidder.
- This RFP is open to innovative and creative responses.  
Any ideas that would make attainment of BNY's stated objectives simpler, more efficient, and/or cost effective are expected and will be gladly accepted.
- Bidder is encouraged to respond to this RFP with creative ideas regarding product, process and systems as long as the RFP requirements are met.
10. Request for Clarifications and Addenda      All questions regarding this Request for Proposal should specifically address the requirements, requests, concerns and options stated throughout this RFP and should be made via Ivalua tool to BNY procurement and by email to JLL.



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| 11. Addenda to the RFP                    | If it becomes necessary to revise any part of this RFP, revisions will be provided in writing to all Bidders who are known to have received a copy of the RFP and will be sent via e-mail.<br>Potential Bidders shall acknowledge, in writing, receipt of all amendments, addenda and changes issued in connection with this RFP by submitting an affirmative statement in the proposal.   |
| 12. Right to correct Minor Irregularities | BNY reserves the right to correct, or allow the Bidder to correct, minor irregularities in the proposals if the best interests of BNY will be serviced by doing so without incurring any liability.  |
| 13. Withdrawal of Proposals               | A Bidder may withdraw his/her proposal after it has been submitted, if a request is made in writing prior to the deadline for receiving the proposals.   |
| 14. Disqualified Bidders                  | At its sole discretion, BNY may disqualify or reject any of the Bidders. Examples of causes that may be considered as sufficient for the disqualification and/or rejection of a Bidder's proposal include:<br><ol style="list-style-type: none"><li>1. More than one (1) proposal for the same contract from an individual, firm or corporation under the same or different name.</li><li>2. Evidence of collusion among bidders.</li><li>3. Unsatisfactory performance record as evidenced by past experience.</li><li>4. If the unit prices are obviously unbalanced either in excess or below reasonable cost analysis values.</li><li>5. If there are any unauthorized additions, interlineations, conditional or alternate bids or irregularities of any kind which may tend to make the proposal incomplete, indefinite, or ambiguous as to its meaning.</li></ol> |
| 15. Compliance with laws                  | Bidder agrees that it will comply with all applicable federal, state, county and local laws, ordinances, regulations and codes in the performance of its obligations under the parties' Agreement including, but not limited to, the procurement of permits, licenses and certificates where required and payment of applicable taxes. Bidder further agrees to hold harmless and indemnify BNY against any loss or damage, to include reasonable attorney's fees that may be sustained by reason of the failure of Construction Manager / Contractor to comply with such laws, ordinances, regulations and codes.   |
| 16. Contract Term/Duration                | The final terms of the contract shall be negotiated with the selected Bidder at the conclusion of the RFP process, and contingent upon acceptable Supplier/Consultant and product performance, price competitiveness and service level fulfillment.<br><br>The terms of the contract may include renewal options to be exercised at the discretion of BNY and a mutually agreed upon cancellation clause relative to performance and business environment changes.   |
| 17. Bidders Responsibilities              | Bidder is responsible for examining this RFP and the Exhibit(s). Failure to do so will be at the sole risk of the Bidder. Should the Bidder find discrepancies, omissions, unclear or ambiguous intent or meaning, or should any question arise concerning this RFP, Bidder shall notify BNY's Representative of such findings.<br><br>Should such matters remain unresolved by BNY prior to Bidder's preparation of its proposal, such matters must be addressed in Bidder's proposal. It is the Bidder's responsibility to be informed of the questions and responses e-mailed back to the Bidder.   |

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	All proposals must clearly set forth any restrictions or provisions deemed necessary by the Bidder to effectively service the proposed RFP.
18. Bidders representative and team	Please refer to Response Protocol.
19. References	Please refer to Response Protocol.
20. Potential Conflicts of Interest	Identify any potential conflicts of interest and submit a plan for eliminating them.
21. Exceptions and other Information	Identify any exceptions, conditions, liabilities, or limitations Bidder's organization may have to any of the requirements of this RFP. Bidder should also submit any other information that Bidder deems necessary or relevant in assisting BNY in the evaluation of Bidder's proposal.
22. Prime Consultant	Identify any part of the services described in Bidder's response, <u>which are not</u> provided entirely by Bidder's Company. Provide full operational documentation for any business partner, subsidiaries, subconsultants, affiliates, and sister companies and identify and explain any differences. The use of subconsultants may be accepted, at BNY's discretion, but only with the notification and advance written approval of BNY. Explain the rationale for proposing a partner versus a single source provider. Identify the parent Company by name.
23. Consortium Bidding	For consortium bidding, it is the Bidder's responsibility to provide all information to its sub-bidders regarding the provisions of the bid documents and any other information the sub-bidders may require. Contact between BNY and the sub-bidder shall be only through the Bidder, and the Bidder shall so inform the sub-bidders. BNY reserves the right to approve the sub-bidders and third party bidders.
24. Record Keeping and Audit rights	<p>Any Supplier/Consultant providing goods or services under any contract shall maintain accurate accounting records for all goods and services provided there under, and shall retain all such records for a period of at least five (5) years following termination of the contract. Upon reasonable notice and during normal business hours, BNY, or any of its duly authorized representatives, shall have access to and the right to audit any records or other documents pertaining to the contract. BNY's audit rights shall extend throughout the term of the contract and for a period of at least five (5) years thereafter.</p> <p>The Supplier/Consultant shall permit BNY to audit the Supplier/Consultant's records of orders and invoices to assure the validity of pricing and charges to BNY are correct and accurate. If BNY elects to perform on-site audits, BNY will provide the Supplier/Consultant advance notice to such audits and perform the audits during normal business hours with a minimum disruption to the Supplier/Consultant's activities.</p>
25. Proprietary Rights	Bidder agrees that work product including, but not limited to, all information, reports, studies, object, or source codes, flow charts, diagrams and other tangible materials of any nature whatsoever produced by or as a result of any of the services rendered hereunder shall be the sole and exclusive property of JLL. In furtherance thereof, Bidder hereby irrevocably grants, assigns and transfers to BNY all rights, title and interest of all kind, in and to any work product produced hereunder. Bidder shall be entitled to make absolutely no use of any of the materials except as may be expressly permitted herein. If BNY makes use of any such documents following the completion of preconstruction manager's



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services, BNY agrees to indemnify Bidder against any liability that may result from changes made or additions to such documents without preconstruction manager's consent, or against any liability resulting from the use of such documents when such liability results from the change of any existing condition at the Project. Bidder also agrees to execute any documents reasonably requested by BNY in connection with the registration of patent and/or copyrights or any other statutory protection in such work product.

26. Indemnification

Bidder represents and warrants to BNY and JLL that the services provided by Bidder will not violate any proprietary rights of any third party including, without limitation, confidential relationships, patent, trade secrets, copyright rights and any other proprietary rights. Bidder hereby separately agrees to indemnify and hold BNY and JLL harmless from any loss, claim, damage, costs or expense of any kind, including reasonable attorney's fees, to which BNY and JLL may be subjected by a breach of the foregoing warranty by bidder. Bidder also hereby separately agrees to indemnify and hold BNY and JLL harmless from any loss, claim, damage, costs or expense of any kind, including reasonable attorney's fees, to which BNY may be subjected by any finding related to an employer/employee relationship between bidder and BNY/JLL.

27. Publicity

Use of BNY name or projects performed for BNY in any media for purposes of advertisement or for any other purpose is not authorized unless pre-approval in writing is obtained by BNY, such approval not to be unreasonably withheld.