



**ENTERPRISE GREEN COMMUNITIES**

**2019 REQUEST FOR QUALIFICATIONS**

**FOR PROFESSIONAL**

**GREEN TECHNICAL ASSISTANCE**

**SERVICES**

Dated: February 4th, 2019

## I. PROJECT BACKGROUND

Enterprise is soliciting submissions of Technical Assistance Provider (hereinafter TA Provider) qualifications to support its Green Communities initiative. In response to the growing demand for specialized green technical assistance among our affordable housing partners, we have developed this Request for Qualifications (RFQ) to select the nation's leading green development professionals in the residential sector. Our objective is to expand the delivery of technical assistance to local green affordable housing developers across Enterprise Impact Markets. Qualifications shall relate to professional services that enable affordable housing developers and their project teams to design, develop, construct, retrofit, and maintain high performing green housing through effective, practical, best practice strategies.

Once selected, TA Providers will be publicly listed on the Enterprise Green Communities website and will be eligible to respond to Requests for Proposals (RFPs) distributed exclusively to this group.

We will continue accepting applications on a rolling basis for the year of 2019. The application will be open for the following periods:

**February 4<sup>th</sup>, 2019 – March 29<sup>th</sup>, 2019**

Responses will be received the week of April 12<sup>th</sup>, 2019

**April 15<sup>th</sup>, 2019 – June 21<sup>st</sup>, 2019**

Responses will be received the week of July 5<sup>th</sup>, 2019

**July 8<sup>th</sup>, 2019 – September 20<sup>th</sup>, 2019**

Responses will be received the week of October 4<sup>th</sup>, 2019

**October 7<sup>th</sup>, 2019 – December 13<sup>th</sup>, 2019**

Responses will be received the week of January 10<sup>th</sup>, 2020

If you were approved as a TA Provider in the past two years, you don't need to apply again. However, you are welcome to apply for additional categories of expertise if you would like.

All accepted TA Providers will be in the database for a period of two years. At the end of that period of time, you will be required to reapply to remain in the database.

## II. DESCRIPTION OF SERVICES

TA Providers are expected to have: exceptional subject matter expertise; knowledge of building science concepts and green building industry standards and trends; working knowledge of the affordable housing industry; examples of project success when applying their subject matter expertise to the affordable housing industry; documented processes for evaluation of their own work; sound judgment; and a track record of conscientious and timely communication with clients. Expertise must be relevant to single- and/or multi-family housing, and new construction and/or rehabilitation (retrofit).

Areas of subject matter expertise may include one, several, or all the following, to be clearly indicated within the RFQ response:

### **Integrative Design Process/Design Review**

Specific services may include:

- Assist development teams in setting and achieving green goals based on the context of the proposed development by recommending materials, methods, and appropriate technologies that can be integrated to realize cost-effective solutions to improved and more sustainable performance
- Plan and facilitate project charrette in accordance with the Enterprise Green Communities Charrette Toolkit and/or Pre-Development Design Toolkit.
- Assist development team in establishing an integrative approach to designing, constructing/rehabilitating and operating the building(s)
- Facilitate trainings and/or regular development and design meetings
  
- Advise development teams on how to integrate the Enterprise Green Communities Criteria into proposed developments by producing a written report detailing which Criteria can be achieved, who should be responsible for achieving it, suggested methods for doing so, and associated costs
- Review, edit, and/or create plans and specifications for consistency with the Enterprise Green Communities Criteria, the project sustainability objectives, and to maximize performance of the building envelope and mechanical systems
- Analyze the costs and benefits of various design approaches
- Provide expertise in designing green housing for senior populations
- Review necessary and suggested design components with stakeholders in pre-construction meetings

### **Data Analysis / Portfolio Benchmarking**

Specific services may include:

- Coordinate and/or establish a process for the collection of building utility data and input of this data into a robust analysis tool
- Analyze collected data to inform owner's portfolio-wide and building-specific retrofit strategies and operations and maintenance practices
- Establish ongoing tracking procedures for building owners and/or tenants to analyze utility use data to maintain and improve the performance of the building and/or individual dwelling unit

### **Energy Modeling**

Specific services may include:

- Work with industry recognized energy modeling software per building type and program requirements (new/existing, low-rise/high-rise)
- Provide recommendations to optimize building energy performance through increased energy efficiency and/or use of renewable energy technologies, based on project goals
- Develop an energy model before construction/retrofit to inform the project scope, and revise the model after construction/retrofit to reflect the building's final as-built condition

## Renewable Energy & Stormwater Management

Specific services may include:

- Assist project teams in performing project-feasibility analysis, business-model development, and service definition for district-scale energy solutions
- Assist project teams in the design and installation of solar photovoltaic and domestic hot-water systems, and buildings built as “solar ready”
- Identify opportunities for installing and financing solar, geothermal, wind or other renewable energy technologies at the project or community scale
- Identify opportunities for installing and financing systems for harvesting rain, storm and graywater at the project or community scale
- Provide expertise in sizing, specifying, and financing PV battery back-up solutions for resilience purposes

## Audits, Inspections, and Performance Testing

Specific services may include:

- Provide audit of existing building and identify strategies for improving the indoor environmental quality of the building, decreasing energy and water consumption, and otherwise enhancing building sustainability
- Conduct visual inspection of building prior to insulation installation to identify potential air sealing, insulation coverage and envelope issues. Grade installation of insulation per RESNET guidelines
- Visually inspect mechanical (heating, cooling, ventilation, domestic hot water) equipment and distribution systems at rough-in for sizing compliance, sealing and insulation measures, efficiency compliance, and installation design recommendations.
- Perform tests and interpret results for total duct system leakage and duct system leakage to the outside of the building envelope
- Perform tests and interpret results for building envelope leakage. May require whole building, apartment, and/or guarded apartment testing
- Complete all additional visual inspections, performance testing, and certification and verification protocols for the ENERGY STAR Certified New Homes program and/or Qualified Multifamily High-Rise Buildings program
- Conduct BPI combustion analysis and safety testing
- Conduct visual inspection and verification of fixtures, appliances, materials, and other items consistent with the project’s green design and scope including those for compliance with the Enterprise Green Communities Criteria
- Conduct air sampling for carbon dioxide, carbon monoxide, formaldehyde, Volatile Organic Compounds, and fine particle pollution (PM2.5)
- Identify and design appropriate whole-building and point source ventilation systems for the building/construction type, and/or conduct performance testing to ensure adequate ventilation levels are met
- Perform post-construction/retrofit audit to evaluate building performance regarding energy, water, and indoor environmental quality
- Review data from the site inspections with the project team and offer best practice guidance. If deficiencies are found in the construction technique or equipment of the building, demonstrate to the project team representative the appropriate method or technique for installation. Produce timely written reports noting deficiencies and recommended corrective measures

## Comprehensive Green Capital Needs Assessment (GCNA) Services

Specific services may include:

- Prepare energy modeling and/or energy analysis
- Conduct on-site building assessment including evaluating energy and water consumption, indoor environmental quality, combustion appliance safety, integrated pest management, and traditional PNA measures per the guidelines of the Enterprise Green Capital Needs Assessment Protocol
- Develop assessment report identifying critical/non-critical repair schedule as well as opportunities for optimizing building performance and indoor environmental quality per the guidelines of the Enterprise Green Capital Needs Assessment Protocol
- Estimate construction costs, develop savings estimates (consumption, cost, carbon), and develop cost/benefit analysis
- Prepare financial analysis that includes replacement reserve analysis, investment grade level SIR, lifecycle cost analysis, and simple payback
- Prepare feasibility analysis for the installation of renewables

## Training

Specific services may include:

- Develop and deliver training modules relevant to building awareness regarding the intention of any/all green building measures.
- Develop and deliver training modules relevant to creating worker competency regarding implementation of any/all Green Communities Criteria measures
- Evaluate impact of training modules

## Green Operations and Maintenance

Specific services may include:

- Develop and deliver training modules for green resident behavior change; provide evaluation of impact of these services
- Develop and deliver training modules to property management and maintenance staff on green protocols in order to ensure buildings will perform as designed; provide evaluation of impact of these services
- Develop and deliver protocols for owners to manage their portfolios in a green manner; provide guidance for owner to evaluate impact of these actions

## Public Health

Specific services may include:

- Assist development team in collecting and analyzing publicly available health data to identify the health needs of those who will be impacted by the planned housing development or rehabilitation.
- Facilitate local stakeholder and resident engagement to prioritize the health needs identified through data collection and gather qualitative data on the way community members would like the housing development to address their health needs.
- Assist development team in identifying evidence-based design, programmatic, or technology solutions to address prioritized resident health factors (see [2015 Green Communities Criteria](#), 1.2a/b)
- Advise development team on how to prioritize resident health by recommending materials, methods, and appropriate technologies that align with project scope and budget.

- Assist development team in identifying local partners to work with and address resident health needs.
- Develop a monitoring and evaluation plan to measure the impact of the design, programmatic, and technology solutions that will be used to address resident health. The plan must consider the organizational capacity of the development and operations team. Enterprise will provide assistance from tools created by Success Measures.
- Prepare written documentation of engagement, results, and process based on relevant Green Communities Criteria requirements.

### **Resilience**

Specific services may include assisting affordable housing developers, residents, and stakeholders by providing expertise in on or several of the following areas:

- Emergency Planning
- Emergency Management
- Disaster Relief
- Design Expertise in Climate Mitigation and Adaptation
- Education

### **Building Professionals Working on Healthy Housing**

These building professionals are not public health or medical professionals; however, they have experience in optimizing resident health through building-level choices. Specific services may include:

- Healthy material and site selection
- Creating safe living environments
- Monitoring indoor air quality
- Integrating resident health needs into the design features of the building

### **Cultural Resilience**

Research shows that places most resilient to extreme events, such as tsunamis, hurricanes, and heat waves, were not only structurally sound but also socially connected. As we begin to incorporate Cultural Resilience criteria into our 2020 Enterprise Green Communities Criteria, we are seeking qualifications for TA providers who can support community developers in the integration of equitable creative placemaking practices to strengthen social connection and build community resilience.

Providers should demonstrate their experience with strategies that support communities to create healthy, resilient places that are socially connected and culturally uplifted. Specific services related to this area of expertise include:

- Helping organizations to design and implement creative community engagement processes
- Facilitating art and cultural activities that connect places and people
- Mapping local cultural assets and opportunities
- Providing cultural resilience assessments and strategic plans
- Defining metrics and strategies for evaluating cultural resilience

### III. SUBMISSION REQUIREMENTS

*Note: If you are currently an approved [Green Communities TA Provider](#) you do not need to submit again.*

Interested parties are encouraged to submit a response to this RFQ. Applications must be submitted through [Slideroom](#) and include answers to the following questions:

#### A. Lead Applicant Organization Data

1. Legal Name of Organization
2. Primary Contact
3. Contact's Title
4. Contact's Telephone and Email Address
5. Physical Address (specify headquarters, relevant satellite offices and geographic scope of services for each)
6. Web Address (URL)
7. Age of Organization
8. Legal Status of Organization
9. Number of Employees
10. Organizational History

#### B. Team Description

1. Identification of key personnel including organizational chart illustrating names, titles, and areas of expertise specific to those listed within the Description of Services (section II). ***(Submit as an attachment)***
2. Resumes for key personnel, including experience with similar projects per the areas of expertise listed within the Description of Services (section II). ***(Submit as an attachment)***

#### C. Relevant Experience and Capabilities

1. Clearly indicate which areas of expertise, per the Description of Services (section II), are most relevant to your team and key personnel.
2. Please upload project examples for each category you are applying. The examples should have occurred during the last three years and demonstrate the experience and capabilities of your team and key personnel. Include project-type experience including single-family, multifamily, or both. Include current contact information for whom the services were provided. ***(Submit as an attachment)***
3. Describe recent experience of your team and key personnel as it relates to delivering services to the affordable housing industry.
4. Describe your team and key personnel's recent history of responsiveness to clients, experience with diverse project teams, and stakeholder coordination. May include up to two reference statements.
5. Describe your team's internal protocols regarding evaluating the effectiveness of your services.

#### D. Submission of HUD-required Documents

1. The Applicant is required to have or obtain a Dun & Bradstreet (DUNS) number. A DUNS number can be obtained free of charge by applying online at <http://fedgov.dnb.com/webform> or by phone at 866-705-5711

2. The Applicant must maintain an active account in the System for Award Management (SAM). Information on registering can be found here: [https://www.sam.gov/sam/transcript/Quick\\_Guide\\_for\\_Grants\\_Registrations\\_v1.7.pdf](https://www.sam.gov/sam/transcript/Quick_Guide_for_Grants_Registrations_v1.7.pdf). To register, visit website: [www.sam.gov](http://www.sam.gov)
3. The Applicant must submit copies of emailed confirmations of the DUNS number and registration in the SAM. ***(Submit as an attachment)***

#### **IV. EVALUATION CRITERIA**

Complete applications submitted prior to the deadline will be assessed using the following criteria:

- Subject matter expertise and key personnel capabilities related to green housing
- Demonstrated recent success in applying this subject matter expertise and these capabilities to the affordable housing market
- Excellent written and oral communications skills: Ability to understand and discuss technical issues clearly and concisely with non-technical stakeholders in a responsive manner
- Attention to quality
- Capacity: Project team's ability to respond quickly to meeting requests and on-site review during the duration of a project

#### **V. SUBMISSION GUIDELINES**

Responses to this RFQ must be submitted through [Slideroom](#) using the following schedule:

**February 4<sup>th</sup>, 2019 – March 29<sup>th</sup>, 2019**

Responses will be received the week of April 12<sup>th</sup>, 2019

**April 15<sup>th</sup>, 2019 – June 21<sup>st</sup>, 2019**

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**October 7<sup>th</sup>, 2019 – December 13<sup>th</sup>, 2019**

Responses will be received the week of January 10<sup>th</sup>, 2020

Late responses, and responses submitted by other means (eg. US Mail), will not be considered.