



ENTERPRISE GREEN COMMUNITIES

2020 REQUEST FOR QUALIFICATIONS

FOR PROFESSIONAL

GREEN TECHNICAL ASSISTANCE

SERVICES

Dated: April 28th, 2020

I. PROJECT BACKGROUND

Enterprise is soliciting submissions of Technical Assistance Provider (hereinafter TA Provider) qualifications to support its Building Resilient Futures initiative. In response to the growing demand for specialized technical assistance among our affordable housing partners, we have developed this Request for Qualifications (RFQ) to select the nation's leading professionals in applying green building, public health, and community engagement principles to the affordable housing sector. Our objective is to expand the delivery of technical assistance to local 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.

We will be accepting applications on a rolling basis for the year of 2020. The application will be open for the following periods:

April 28th, 2020 – June 26th, 2020

Responses will be returned the week of July 6th, 2020

July 6th, 2020 – September 25th, 2020

Responses will be returned the week of October 5th, 2020

October 5th, 2020 – December 11th, 2020

Responses will be returned the week of January 11th, 2021

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

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.

Any TA Provider approved in the Fall of 2017 needs to reapply by the end of this year to stay current in the database.

II. Benefits of Partnership

TA Providers are trusted partners who provide technical assistance to the affordable housing sector in various categories related to the Enterprise Green Communities Criteria. We seek to build partnerships with organizations who provide energy services (modeling, renewable, benchmarking), stormwater management, integrative design, cultural resilience, and public health. Additional services are listed in section III. Here is what you can expect to receive by getting approved to be a TA Provider:

- Opportunity to be first in line for published case studies of certified projects
- Access to be highlighted in blog posts and our social media channels, Twitter [[@E_HousingGreen](#)] and LinkedIn [[Enterprise Community Partners](#)]
- Quarterly webinars that provide opportunity for further training and an open forum for feedback
- Priority access to Request for Proposals
- Public listing on our website

III. DESCRIPTION OF SERVICES

TA Providers are expected to have: exceptional subject matter expertise in the categories they're applying; 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, as well as, 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
- Assist development teams in establishing an integrative approach to designing, constructing/rehabilitating and operating the building(s)
- Draft contractor, subcontractor and consultant education plan(s)
- Plan and facilitate collaborative meetings including charrettes in accordance with the Enterprise Green Communities Charrette Toolkit and/or Pre-Development Design Toolkit
- 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
- Facilitate trainings and/or regular development and design 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 developing strategies to understand and protect ecosystems and sensitive lands including floodplains, aquatic ecosystems, threatened habitats and agricultural soils Identify opportunities to help project teams identify zero energy and zero carbon strategies
- 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 and 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
- Assist project teams in performing project-feasibility analysis, business-model development, and service definition for district-scale energy solutions

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 Construction 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 to align with the guidelines of the Enterprise Green Capital Needs Assessment Protocol; [Fannie Mae's High-Performance Building Module](#); [HUD's Green Capital Needs Assessment](#); New York [Integrated Physical Needs Assessment](#)
- 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, simple payback, and avoided carbon dioxide equivalents
- 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:

- Partner with affordable housing development team, understand the affordable housing development process, and incorporate public health considerations with respect to the developer needs, limitations, and timeline for the project
- 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 2020 Enterprise Green Communities Criteria, 1.5)
- Advise development team on how to prioritize resident health by recommending health promoting materials, design strategies, and appropriate technologies for the built environment 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.
- Prepare written documentation of engagement, results, and process based on relevant Green Communities Criteria requirements

Resilience

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

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

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 affordable housing 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](#) within the last two years, you do not need to submit again. Anyone approved in the Fall of 2017 needs to reapply by the end of the year to maintain their status in the database.

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.
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 statements from references.
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. To register, visit website: 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 separately for each area of expertise 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:

April 28th, 2020 – June 26th, 2020

Responses will be returned the week of July 6th, 2020

July 6th, 2020 – September 25th, 2020

Responses will be returned the week of October 5th, 2020

October 5th, 2019 – December 11th, 2020

Responses will be returned the week of January 11th, 2021

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