

REQUEST FOR QUALIFICATIONS (RFQ)

Enterprise Green Accelerator Building Science Technical Assistance

Released: December 19, 2024

Due: January 30, 2025

1. ABOUT ENTERPRISE GREEN ACCELERATOR

Enterprise Green Accelerator, Inc. (EGA) is an affiliate non-federal entity formed by Enterprise Community Partners, Inc. (ECP) to implement an Environmental Protection Agency Greenhouse Gas Reduction Fund National Clean Investment Fund (NCIF) subaward to Power Forward Communities, Inc. (PFC). PFC is a coalition of five corporate member organizations, including ECP. PFC will make a subaward to EGA (the “Subrecipient Agreement”) which will deploy NCIF funding to support the decarbonization of affordable multi-family housing through a number of strategies including technical assistance, capacity and market building activities, and capital solutions for affordable housing owners and developers.

2. PROJECT BACKGROUND

This request for qualifications (RFQ) is to competitively prequalify multiple vendors for consideration for technical assistance and predevelopment services contracts related to EGA’s obligations under the Subrecipient Agreement.

NOTE: The award from the EPA to PFC was entered into as of August 8, 2024 (the “EPA-PFC Award”). However, EGA has not yet entered into the Subrecipient Agreement with PFC as of the date of this RFQ. As such, any pre-qualification made under this RFQ is contingent upon the final Subrecipient Agreement. The terms and conditions and flow down provisions contained in this RFQ may evolve and be revised as the Subrecipient Agreement is executed. Selected respondents will be provided with the current flow down provisions as EGA knows them at the time prior to any contract execution.

The primary goal of EGA’s project to be funded through the Subrecipient Agreement (the “Project”) is to build the demand and capacity of developers and owners of affordable multifamily housing and community facilities to undertake activities in their properties and portfolios that ultimately reduce emissions and deliver community benefits. Additionally, the Project will need to meet energy savings standards to be ready to receive NCIF financing.

A key component of EGA’s work is the provision of Multifamily Technical Assistance (TA), which aims to build market capacity and the ability to carry out these activities across the nation. This component includes developing a network of TA providers to deliver this expertise. LISC Green, LLC, an affiliate of Local Initiatives Support Corporation (LISC Green) and EGA are collaborating on the NCIF initiative, and selectees will be engaged in technical assistance efforts to support this cross-coordination.

The TA will provide a range of assistance, from basic principles and strategies to more advanced techniques and best practices, ensuring developers, architects, contractors and engineers have access to the knowledge needed to meet NCIF requirements. Additionally, in-depth TA will be provided to potential EGA borrowers (developers/owners/operators of multifamily affordable housing) who are exploring and/or undertaking emissions-reduction activities in their properties, such loans also funded by the PFC Award. Emphasis will be placed on aligning TA with NCIF-eligible activities to maximize impact, contributing to the broader reach and influence of NCIF resources. Knowledge sharing will be a crucial element, with resources and expertise disseminated to enhance the capacity of developers/owners/operators to implement effective and NCIF-compliant investments in their properties.

NOTE: EGA anticipates that multiple TA providers will be selected for prequalification under this RFQ and, subject to agreement to all terms and conditions as set forth below, will enter into a Master Contract, with future services to be set forth in specific Task Orders to the Master Contract. Please be aware that when a contractor is needed for a particular scope of work, a competitive procurement process will be completed among the pool of prequalified TA providers. The selected provider(s) from that process will then enter into the applicable Task Order. Selection as a prequalified TA provider does not guarantee a specific volume of work.

- 3. SUBMISSION GUIDELINES.** Responses to this RFQ must be submitted within SlideRoom at <https://enterprise.slideroom.com/#/permalink/program/82069> by 5 PM EST on January 30, 2025 EGA anticipates that selection decisions will be announced during the week of February 21, 2025. All costs that may be incurred to respond to this RFQ are non-reimbursable. Late responses and responses submitted by other means (e.g., US Mail) will not be considered.
- 4. PERIOD OF PERFORMANCE.** EGA anticipates that successful contractors will be prequalified for a period of 3 years through a Master Contract with the ability to renew the Master Contract if necessary to meet the Project's goals and deliverables.
- 5. OBJECTIVE OF THIS RFQ.** The objective of this RFQ is to develop a pool of responsible contractors capable of performing the services described herein with reasonable costs and efficiency. Contractors are not required to be capable of supplying services in all geographical regions. EGA will match qualified contractors with individual tasks as appropriate.
- 6. DESCRIPTION OF SERVICES.** Areas of subject matter expertise and ability may include one, several, or all of the following services. Selected contractors will not need to deliver on all of these services. Please clearly indicate within your response (1) each area of expertise, considering the following anticipated scope of services, and (2) note whether such

expertise applies to single family properties, multifamily properties, and/or community facilities (such as schools).

- A. **Energy Benchmarking**, including use of ENERGY STAR Portfolio Manager to determine energy intensity, equipment needing upgrades, and how the building performs relative to other buildings of its size in the same climate zone.
- B. **New Construction Property Analysis** (Energy Modeling & Scope Development) in order to achieve zero emissions.
- C. **Existing Building Property Analysis** (from Audit through Scope/Spec Development) in order to achieve zero emissions over time.
- D. **Assessing Rehab Projects to Meet Multifamily Standards Required for EGA Lending:**

New Construction

Category 1: Green New Construction Loan: Certification to Enterprise Green Communities or an equivalent green standard, which must conform at the minimum with the following:

- Certification to ENERGY STAR Residential New Construction Program
- All electric (exceptions for backup power sources and DHW systems for buildings over 7 stories)

Category 2: Green Plus New Construction Loan: Certification to Enterprise Green Communities Certification Plus or an equivalent green standard, which must conform at the minimum with the following:

- Certification to DOE ZERH, PHI Classic, or PHIUS
- All electric (exceptions for backup power sources and DHW systems for buildings over 7 stories)

Category 3: Net-Zero New Construction Loan: Certification to [Enterprise Green Communities Certification Plus](#), or an equivalent green standard, as well as compliant with [National Zero Emissions Building Definition](#), which must conform at the minimum with the following:

- Certification to DOE ZERH, PHI, or PHIUS
- All electric (exceptions for backup power sources and DHW systems for buildings over 7 stories)
- Install and/or procure carbon-free energy sources which in sum will produce as much or more energy in a given year than the project is modeled to consume

Existing Construction

Category 1: Energy Efficiency Rehab Loan:

- 20% improvement in energy performance compared to pre-rehabilitation
- No new or replacement systems may be powered by fossil fuels (exceptions for backup power sources and domestic hot water (DHW) systems for buildings over 7 stories)

Category 2: Net-Zero Over Time Loan:

- Certification to [Enterprise Green Communities Zero Carbon Over Time](#), or an equivalent green standard, which must conform at the minimum with the following:
 - 30% improvement in energy performance compared to pre-rehabilitation
 - No new or replacement systems may be powered by fossil fuels (exceptions for backup power sources and domestic hot water (DHW) systems for buildings over 7 stories)
 - Pathway to zero scope 1 and scope 2 emissions over time

Category 3: Net-Zero Rehab Loan:

- Certification to [Enterprise Green Communities Plus](#), or an equivalent green standard, as well as compliant with [National Zero Emissions Building Definition](#), which must conform at the minimum with the following which must conform at the minimum with the following:
 - Energy performance verified as within the top 25% most efficient buildings in the market with similar use, based on measured whole-building energy use
 - All electric (exceptions for backup power sources and DHW systems for buildings over 7 stories)
 - Install and/or procure carbon-free energy sources which in sum will produce as much or more energy in a given year than the project is modeled to consume

E. Portfolio Energy Analysis

- a. Portfolio/pipeline analysis for prioritizing energy upgrades and reaching zero emissions across a portfolio over time
- b. Portfolio greenhouse gas emissions inventory (scopes 1, 2, and 3)

F. Renewable Energy Power Procurement

- a. Photovoltaic/solar technical feasibility analysis
- b. Photovoltaic/solar proforma development
- c. Procuring community solar

G. Understanding and Integrating Financial Assistance and Tax Rebates into Projects

- a. Financial incentives: identification, application support, coaching
- b. Utilizing tax incentives for decarbonization in affordable housing

H. Training Development and Delivery

- a. Curriculum development for online and/or in-person trainings (Specify whether for developers, contractors, residents, or property operations & maintenance staff)
- b. Training delivery (Specify whether for developers, contractors, residents, or property operations & maintenance staff)

I. Federal Grant Compliance and Reporting

- a. Assist with tracking mechanisms to meet federal grant reporting guidelines
- b. Meeting federal grant evaluation, measurement, and verification protocols

7. SUBMISSION REQUIREMENTS

A. Respondent Organization Data

- a. Cover Letter
- b. Legal Name of Organization
- c. Primary Contact
- d. Contact's Title
- e. Contact's Telephone
- f. Email Address
- g. Physical Address (specify headquarters, relevant satellite offices, and geographic areas for each that can be served under the scope of services)
- h. Web Address (URL)
- i. Age of Organization
- j. Legal Status of Organization
- k. Select the applicable federal, state, or local government-issued designations that your organization may have:
 - a. Native American-Owned
 - b. Minority Business Enterprise
 - c. Disadvantaged Business Enterprise
 - d. Women-Owned Business Enterprise
 - e. Small Business
 - f. Veteran-Owned Small Business
 - g. Service-Disabled, Veteran-Owned Small Business
 - h. SBA Certified Small Disadvantage Business
 - i. SBA Certified 8(a) Firm
 - j. SBA Certified HUBZone Firm
 - k. Other
- l. Languages spoken by staff providing services
- m. Number of W2 Employees
- n. Organizational History
- o. Federal Program/TA experience and compliance
- p. Conflict of Interest Statement (see below in Section 9)
- q. List five clients where you have done similar work

- r. Upload at least one project example for each category of Description of Services you are applying for. The examples should have occurred within the last three years and demonstrate your team's and key personnel's experience and capabilities. Include project-type experience, including single-family, multifamily, and/or community facilities. Include current contact information for the people to whom the services were provided.
 - a. For each, include:
 - i. Project Title
 - ii. Client Point of Contact (name, phone, email) + approval to contact
 - iii. Engagement/Contract Dollar Amount
 - iv. Period of Performance
 - v. Description of Work
 - vi. Relevance to this RFQ
 - vii. Major Project Outcomes

B. Team Description

- a. Identification of key personnel, including organizational chart illustrating names, titles, and areas of expertise specific to those listed within the Description of Services. Key personnel are individuals that the respondent proposes, that it expects to be substantially involved in the delivery of any contracts issued to it under the scope of this RFQ. Typically, key personnel should be senior staff that demonstrate a depth of applicable experience in the types of services described under Section 5 of this RFQ. (Submit as an attachment)
- b. Resumes for key personnel, including experience with similar projects per the areas of expertise listed within the Description of Services. (Submit as an attachment)
- c. If any other organizations are integral to your organization's delivery of TA, please explain that here in this section.

C. Relevant Experience and Capabilities

- a. Clearly indicate which areas of expertise, in the Description of Services (Section 5), are most relevant to your team and proposed key personnel.
- b. Describe your team and key personnel's recent experience in delivering services to the affordable housing industry, as well as experience working in urban, rural, and tribal communities.
- c. Describe your team and key personnel's recent history of responsiveness to clients, experience with diverse project teams, and stakeholder coordination. It may include up to two statements from references.
- d. Describe your team's internal protocols for evaluating your services' effectiveness.
- e. Capacity to do the work: Explain your project team's ability to respond quickly to meeting requests and conduct on-site reviews during the project's duration.

D. Pricing Information

The narrative response must include brief descriptions of labor categories with the minimum qualifications of each labor category. Respondents must provide a proposed price, including

information on the hourly wage or billing rates of all key personnel, alongside other anticipated staff by labor categories, or costs necessary to support the scope of services described throughout this solicitation. To the extent that the respondents have fixed price offerings or known costs that it anticipates providing under the RFQ scope, please provide pricing information and description of those costs and/or services.

Confidentiality

If the respondent deems any materials submitted to be proprietary or confidential, the respondent must indicate as such in the relevant section(s) of the response.

Credentials for Federal Contracting: Unique Entity ID (System for Award Management)

All contractors receiving federal funds through EGA must have a Unique Entity ID issued by the System for Award Management (SAM). SAM is a free web site hosted by the federal government that consolidates the government-wide award reporting systems into one system. SAM streamlines processes, eliminating the need to enter the same data multiple times, and consolidates hosting to make the process of doing business with the government more efficient. The website and information on how to create a user account is found at <https://www.sam.gov/SAM/>.

To receive an award, contractors must not have active exclusions or delinquent federal debt and may not be currently debarred, suspended, proposed for debarment or declared ineligible for awards by any federal agency.

Federal Funding Accountability and Transparency Act (FFATA)

Contractors must comply (as applicable) with FFATA and provide necessary information to enable EGA to comply with FFATA reporting requirements. Please visit <http://www.fsrs.gov> for more information.

Limitations on Consultant Compensation

EGA will compensate pre-qualified contractors in accordance with the EPA's [Best Practice Guide for Procuring Services, Supplies, and Equipment Under EPA Assistance Agreements \[Updated November 2022\]](#) (see page 16; "Limitations on consultant compensation").

Additional information on consultant compensation limitations is available from the Office of Personnel Management: [Expert and Consultant Pay](#) and [How to Compute Rates of Pay](#).

NOTE: EGA reserves the right to amend limitations on consultant compensation pending the finalization and execution of the Subrecipient Agreement and the NCIF Terms & Conditions. Final compensation terms will be negotiated when and if EGA decides to enter into a contract or task order with a pre-qualified contractor.

Right to Reject

EGA reserves the right, in its sole discretion, to reject any and all responses received in response to this RFQ. A contract with a qualified respondent will be based upon the factors described in this RFQ.

8. EVALUATION CRITERIA AND SCORING

Complete responses submitted before the deadline will be assessed separately for each area of expertise using the following criteria:

Qualifications

- a. The respondent has the qualifications necessary to successfully complete the services identified by the respondent as within their expertise.
- b. The respondent has prior experience working on similar projects.
- c. The respondent has prior experience working with affordable housing organizations and on federally funded projects.
- d. Other qualification criteria identified in Submission Requirements (Section 7)

Approach

- a. The response demonstrates an understanding of potential project objectives and desired results.
- b. Excellent written communications skills: Ability to understand and discuss technical issues clearly and concisely with non-technical stakeholders in a responsive manner.
- c. The response illustrates an approach to the services identified by the respondent in which they have an expertise that will likely lead to successful results.
- d. The response illustrates the respondent's ability to successfully execute the proposed approach.

Experience and Past Performance

- a. Quality of submitted examples of representative work.
- b. Demonstrated recent success in applying this subject matter expertise and these technical capabilities to the affordable housing market.
- c. Results of EGA's contacting of references to confirm quality of work and a history of responsiveness and good communication skills.

Budget

- a. The response includes an approach to flat rate engagements.
- b. The response includes hourly rates.
- c. The response describes how overhead and expenses will be minimized and controlled.
- d. The response rates are reasonable for the labor categories and work experience and compliant with NCIF requirements.

9. CONFLICT OF INTEREST

The respondent must disclose, in an attachment to the response, any possible conflicts of interest that may result from the award of a contract or the services provided under the contract. EGA recognizes that responses may be from respondents who are also responding to RFQs or Request for Proposals or otherwise engaging with PFC or any of its corporate member or any other subrecipient under EPA-PFC Award. Such activity with others will not

necessarily preclude a respondent from responding to this RFQ or entering into a contract, however, the respondent's availability will be a factor in assessing qualifications.

Except as otherwise disclosed in the proposal, the respondent affirms that to the best of its knowledge there exists no actual or potential conflict between the respondent, the respondent's employees or their families' business or financial interests ("interests") and the services provided under the contract. In the event of any change in either interests or the services provided under the contract, the respondent will inform EGA regarding possible conflicts of interest, which may arise as a result of such change and agrees that all conflicts shall be resolved to EGA's satisfaction or the respondent may be disqualified from consideration under this RFQ.

"Conflict of interest" shall include, but not be limited to the following:

- a. Giving or offering a gratuity, kickback, money, gift, or anything of value to an EGA official, officer, or employee with the intent of receiving a contract from EGA or favorable treatment under a contract;
- b. Having or acquiring at any point during the RFQ process or during the term of the contract, any contractual, financial, business, or other interest, direct or indirect, that would conflict in any manner or degree with respondent's performance of its duties and responsibilities to EGA under the contract or otherwise create the appearance of impropriety with respect to the award or performance of the contract; or
- c. Currently possessing or accepting during the RFQ process or the term of the contract anything of value based on an understanding that the actions of the respondent or its affiliates or interests on behalf of EGA will be influenced.

10. CONTRACT REQUIREMENTS

A. NCIF Terms and Conditions, EPA General Terms & Conditions and Subrecipient Agreement Flow Throughs

Respondents must comply with all applicable federal regulations and requirements, including without limitation the NCIF Term and Conditions, the EPA General Terms and Conditions and any flow throughs required by PFC in the Subrecipient Agreement (the "Subrecipient Flow Throughs") (all as modified from time to time), Final versions of the NCIF Term and Conditions, the EPA General Terms and Conditions and the Subrecipient Flow Throughs are still in the process of being finalized with the EPA and PFC and will not be final until a Subrecipient Agreement is executed between EGA and PFC.

EGA will update this RFQ with the NCIF Terms and Conditions and, the EPA General Terms and Conditions and the Subrecipient Flow Throughs if they are finalized before the RFQ close and will post publicly on the RFQ website and in Slideroom. EGA will incorporate the NCIF Term and Conditions, the EPA General Terms and Conditions and the Subrecipient Flow Throughs into any Master Contract, Contracts, or Task Orders executed with contractors pre-qualified through this RFQ.

By submitting a response to this RFQ in Slideroom, the person submitting the response acknowledges that any Master Contract and Task Orders entered into by pre-qualified contractors will incorporate NCIF Term and Conditions, the EPA General Terms and Conditions and the Subrecipient Flow Throughs in whole without negotiation and they represent that the respondent is capable of complying.

B. EGA Terms and Conditions

The Master Contract will include certain terms and conditions as required by EGA (the “EGA Terms and Conditions”). The EGA Terms and Conditions are standard requirements for EGA, are rarely negotiated or revised, and are subject to changes or updates that occur within the Subrecipient Agreement or EPA requirements at the time EGA enters into the Master Contract or Task Order with the pre-qualified contractor.

The EGA Terms and Conditions include, but are not limited to, the following:

- Scope of Work and Contractor’s Performance
- Ownership of Deliverables
- Confidential Information
- Personally Identifiable Information
- Information Security and Audits
- Right to Audit/Record Retention
- Compliance with Laws
- Non-Discrimination
- Compliance with Premises Rules, Practices and Policies
- Representations; Warranties; Covenants
- Termination
- Force Majeure
- Use of Subcontractors
- Indemnification
- Limitation of Liability
- Governing Law; Venue (Maryland law; courts within Maryland) (non-negotiable)

By submitting a response to this RFQ, the person submitting the response acknowledges that if the respondent is a successful applicant, the respondent will be expected to enter into the Master Contract and Task Orders as required by EGA which will include the EGA Terms and Conditions set forth in full at the time of contracting. EGA will update this RFQ with the EGA Terms and Conditions if they are finalized before the RFQ close and will post publicly on the RFQ website and in Slideroom.

C. Insurance

EGA requires that all contractors maintain insurance throughout the term of their contract to cover a contractor’s activities. The contractor must provide proof of these coverages as a condition of entering or renewing a contract with EGA. The “named insured” on the policies must match the name of contractor’s legal entity that is contracting with EGA and must name EGA as an “additional insured”. The contractor’s insurance carrier must be rated “A-” or higher in the AM Best Guide with a Financial Size Category of at least VI. Contractors must provide a certificate of insurance (ACORD 25 or other required certificate) signed by an authorized insurance representative.

| Insurances Required for ALL Contractors | |
|---|---|
| Insurance Type | Coverage |
| Commercial General Liability or Business Owners Policy (BOP) | \$1,000,000 per occurrence \$2,000,000 in annual aggregate Named additional insured |
| Worker's Compensation | A minimum of \$500,000 Employers' Liability Limit or consistent with state statute. Certificate holder |
| Professional Liability Insurance (Errors and Omissions Insurance) | \$1,000,000 per occurrence \$1,000,000 in annual aggregate Certificate holder |
| Insurances EGA may Require based upon a final Scope of Work | |
| Commercial Auto Insurance | \$1,000,000 for combined liability/physical damage Hired/non-owned coverage EGA required to be additional insured |
| Hired/Non-Owned Auto Coverage as a rider on a Commercial General Liability policy | Hired/Non-Owned Auto Coverage on General Liability \$1,000,000 Combined Single Limit EGA required to be additional insured |
| Personal Auto Insurance (Sole Proprietors) | \$100,000 per person and \$300,000 per accident Bodily Injury Liability and \$100,000 per accident in Property Damage Liability Hold Harmless |
| Cyber Insurance | \$1,000,000 per claim, with third party coverage EGA required to be additional insured |

11. QUESTIONS AND CONTACT INFORMATION:

If you have any questions concerning this RFQ, please contact Jackie Montesdeoca jmontesdeoca@enterprisecommunity.org by no later than 5 P.M. ET on January 15, 2024.

Respondents are prohibited from contacting any other EGA or PFC employee about this RFQ. Only written questions submitted to the provided email address will be entertained, and responses will be sent in writing. Failure to follow this guideline will result in disqualification of your response.

Technical issues with SlideRoom must be sent to support@slideroom.com or by accessing the online help desk: <https://support.slideroom.com/>. Responses from SlideRoom typically take 48 hours.

When relevant, questions and answers (with the questioner's identity removed) will be posted on the Enterprise website by January 24, 2025, for transparency and timely communication.

Respondents are encouraged to request further clarification by the specified date if they find any

part of this RFQ unclear or subject to multiple interpretations. EGA will not be responsible for any errors, ambiguities, or inconsistencies in this RFQ.

Submissions are due by January 30, 2025 at 5pm Eastern time.

Selection of qualified contractor(s) to participate in the Project is planned to occur by February 21, 2025 at which time EGA will initiate the process to enter into a Master Contract with the pre-qualified contractor. As stated earlier, selection to be a qualified contractor does not guarantee that successful respondents will be selected for specific work for the Project. For each specific service, a federally compliant procurement process will occur, with selection from that process resulting in a duly-processed and executed Task Order under the Master Contract.