



WASHINGTON STATE  
HOUSING FINANCE  
COMMISSION

*Opening doors to a better life*



SUSTAINABLE  
ENERGY  
PROGRAM

November 2015

## **Request for Qualifications Energy Consulting And Modeling Services (Request for Qualifications)**

**Washington State Housing Finance Commission  
Sustainable Energy Program**

**Submission Deadline: 5:00 PM, Tuesday December 1, 2015**

***The Washington State Housing Finance Commission is a publicly accountable, self-supporting team, dedicated to increasing housing access and affordability and to expanding the availability of quality community services for the people of Washington.***

Respondents:

The Washington State Housing Finance Commission (“the Commission”) is issuing a Request for Qualifications (RFQ) from engineers, energy consulting firms, and utility consumption analysts to qualify for the Commission’s referral list for such services.

It is likely that the majority of demand for such services will be from developers and nonprofit sponsors participating in the Commission’s Multifamily Housing and Community Facilities Division (“MHCF”) programs. Respondents with successful submissions will be placed on the Approved Roster of Energy Modeling Consultants (“roster”) from which organizations seeking financing may select.

The roster will be valid for two years and will be up for renewal in late 2017. The Commission may remove an Energy Modeling Consultant from the roster at any time

subject to appropriate notice. Inclusion on the roster does not guarantee selection of services by developers, borrowers or property owners. Should the Commission need Energy Modeling Consultant services, a separate RFQQ (Request for Qualifications and Quotations) for the specific service will be issued for a formal contract.

Background information, submission requirements, evaluation criteria and other contract information concerning this RFQ are discussed in the sections below.

Respondents to this RFQ should indicate each program they are interested in supporting and include relevant experience in those areas in their response.

## **Background Information**

The Commission issues tax-exempt and taxable bonds on behalf of affordable multifamily housing developers, nonprofit organizations and other entities developing housing and nonprofit-owned facilities such as social service agencies, private schools, and museums. It also funds and administers Program Investment Fund investments such as Capital Plus! a program funding small loans to nonprofits, Manufactured Housing Community Preservation Program, and the Sustainable Energy Trust (“SET”) to finance energy efficiency and renewable energy projects.

MHCF projects that may require energy analysis include:

- Multifamily bond-financed projects (generally market rate facilities including assisted living facilities that have limited income restrictions);
- Bond/4% Low-Income Housing Tax Credit (“tax credit”) multifamily properties (rent restricted properties with a small equity subsidy);
- Competitive 9% tax credit multifamily properties (rent restricted, higher subsidized properties serving households with low- and very low-incomes.);
- Bond-financed nonprofit owned housing such as group homes for the developmentally disabled, nursing homes, independent and assisted living, as well as Continuing Care Retirement Communities (“CCRCs”);
- Nonprofit Facilities such as YMCAs, museums, independent schools, elder and child daycare facilities, community service organizations and organizations offering job training, community centers, and neighborhood enrichment.

Multifamily projects receiving tax credits are required to meet the Evergreen Sustainable Development Standard, maintained by the Washington Department of Commerce, and must calculate Utility Allowances to determine the balance of rent and utilities that may be charged to tenants.

## **Services to be Provided as an Approved Energy Modeling Consultant**

Energy Modeling Consultants approved by the Commission may be selected by developers, borrowers, or property owners to provide energy consumption models, energy efficiency savings calculations or other energy-related analyses for the Commission’s consideration in various programs.

- *Utility Allowance Calculations for New Construction.* Using an energy consumption model, calculate energy, water and sewage consumption and billing estimates for multifamily projects applying to the Commission for tax credits. Energy consumption models should be consistent with 26 C.F.R 1.42-10, paragraph (b)(4)(ii)(E) of the federal tax code. Provide post-construction measurement and verification of utility consumption, if requested.
- *Utility Allowance Calculations for Retrofit/Rehabilitation of Existing Buildings.* Using an energy consumption model, calculate energy, water and sewage consumption and billing estimates for revisions to the Commission-approved utility allowance for tax credit multifamily projects. Energy consumption models must be consistent with the 26 C.F.R 1.42-10, paragraph (b)(4)(ii)(E) of the federal tax code. Provide post-installation measurement and verification of utility consumption, if requested.
- *Energy Efficiency Calculations for New Construction.* Calculate energy efficiency savings resulting from energy efficiency investments beyond code requirements for new construction of single-family housing, multi-family housing, senior housing, non-profit and community facilities, or other facilities seeking funding or financing with the Commission. Provide post-construction measurement and verification of energy efficiency savings, if requested.
- *Energy Efficiency Savings Calculations for Retrofit/Rehabilitation of Existing Buildings.* Calculate energy efficiency savings resulting from energy efficiency investments for existing single-family housing, multi-family housing, senior housing, non-profit or community facilities, or other facilities seeking funding or financing with the Commission. Provide post-installation measurement and verification of energy efficiency savings, if requested.

## **Information to be Included in the Response**

1. Please describe your firm's experience during the last two years providing energy or utility consumption or cost modeling, or post-completion audits of building performance for residential and/or commercial buildings. Specify the types of services provided to these clients, and provide a list of clients the Commission may use as references.
2. Please identify key individuals who would conduct the analysis, and describe relevant degrees, certifications, or experience.
3. Identify your firm's interest in providing each of the following services:

- a. Utility Allowance Calculations for New Construction
  - b. Utility Allowance Calculations for Retrofit/Rehabilitation of Existing Buildings
  - c. Energy Efficiency Calculations for New Construction
  - d. Utility Savings Calculations for Retrofit/Rehabilitation of Existing Buildings
4. Discuss your firm's ability to provide the described services and why your firm is qualified to act as an Energy Modeling Consultant to developers and nonprofit sponsors seeking Commission funding or financing.
  5. Identify and describe the platform(s) used as the basis for your energy consumption or cost analysis (i.e. Excel model, whole building simulations). Identify the factors considered in your analysis, such as unit size, building orientation, design and materials, mechanical systems, control systems, appliances, interaction effects between building systems, building location characteristics, weather, occupancy, metering characteristics, comparison to similar buildings or building codes, and utility rate schedules. Note: This may not be a comprehensive list of relevant factors or variables, so please identify any additional factors or variables that may be considered in your analysis.

## **Selection Criteria**

In reviewing Energy Modeling Consultants for the roster, the Commission will consider at least the following, not necessarily in order of priority:

1. Demonstrated competence, expertise, and ability.
2. Demonstrated success in identifying measures that reduce energy or utility consumption.
3. Familiarity with Federal Housing Administration (FHA), Section 8, the Low Income Housing Tax Credit Program utility allowance methodologies.
4. Experience in building energy or utility consumption modeling.
5. Experience with post-construction or post-installation measurement and verification.
6. Reputation for services.
7. Qualifications of individuals assigned to provide listed services.

## **Evaluation Process**

Responses will be evaluated by a committee of Commission staff based on the **Information to be included** section of the RFQ.

After review of the responses, Commission staff may contact respondents for additional information or clarification. *Please respond to this RFQ by 5:00 PM Pacific Time on December 1, 2015.* Responses received after December 1 may be processed periodically in batches. Responses should be emailed (PDF preferred) to Juliana Williams at [Juliana.williams@wshfc.org](mailto:Juliana.williams@wshfc.org) or delivered to:

Juliana Williams  
Senior Sustainable Energy Analyst, Multifamily Housing and Community Facilities  
Washington State Housing Finance Commission  
1000 2<sup>nd</sup> Avenue, Suite 2700  
Seattle, Washington 98104-1046

**No facsimile (fax) transmitted responses will be accepted.**

Responses should be limited to 12 pages, including attachments. Please do not provide any brochures of your firm.

The Commission reserves the right to seek clarification of each response.

Questions regarding the information contained in the RFQ should be submitted to the designated RFQ contact, Juliana Williams at [Juliana.williams@wshfc.org](mailto:Juliana.williams@wshfc.org), by 5:00 PM Pacific Time, December 1, 2015.

By submitting a response, consultants agree to waive any claim against the Commission, the State of Washington, and their respective officers, employees, and agents for the recovery of any costs or expenses incurred in preparing and submitting a response.

Prior to the date and time designated for receipt of responses, any response may be modified or withdrawn by notice to the RFQ contact.

**Notice of Approval**

After completing the evaluation of all responses by the committee, Commission staff intends to notify firms of approval or rejection to the roster by December 15, 2015. Timing of notification may depend on the quantity and quality of responses received.

**Rejection of Responses**

The Commission reserves the right to reject any and all responses as a result of this RFQ without liability, and, if doing so would be in the public interest, to cancel this solicitation.

**Requirements**

All respondents must be licensed to do business in the State of Washington.

### **Investigation of References**

The Commission reserves the right to investigate the references and past performance of any proposer with respect to its successful performance of similar services. The Commission may postpone placement on the roster in order to complete its investigation. The Commission reserves the right to reject any response at any time.

### **Proprietary Information/Public Disclosure**

Materials submitted in response to this competitive procurement shall become the property of Commission.

Any information in the response that the respondent desires to claim as proprietary and exempt from disclosure under the provisions of the Washington Public Records Act, Chapter 42.56 RCW, must be clearly designated. The page must be identified and the particular exception from disclosure upon which the respondent is making the claim. Each page claimed to be exempt from disclosure must be clearly identified by the word "Confidential" printed on the lower right hand corner of the page.

The Commission will consider a respondent's request for exemption from disclosure; however, the Commission will make a decision predicated upon Chapter 42.56 RCW and Chapter 44-14 of the Washington Administrative Code. Marking the entire response exempt from disclosure will not be honored. The respondent must be reasonable in designating information as confidential. If any information is marked as proprietary in the response, such information will not be made available until the affected proposer has been given an opportunity to seek a court injunction against the requested disclosure.

A charge may be made for copying and shipping, as outlined in RCW 42.56.120. No fee shall be charged for inspection of contract files, but twenty-four (24) hours' notice to the RFQ Coordinator is required. All requests for information should be directed to the RFQ Coordinator.

### **Revisions to the RFQ**

In the event it becomes necessary to revise any part of this RFQ, addenda will be posted to the Commission's website. The Commission also reserves the right to cancel or to reissue the RFQ in whole or in part.

### **Minority & Women-Owned Business Participation**

In accordance with the legislative findings and policies set forth in Chapter 39.19 RCW, the State of Washington encourages participation in all of its contracts by firms certified by the Office of Minority and Women's Business Enterprises (OMWBE). Participation may be either on a direct basis in response to this solicitation or on a subcontractor basis. However, no preference will be included in the evaluation of responses, no minimum level of MWBE participation shall be required as a condition for receiving an award, and responses will not be rejected or considered non-responsive on that basis.

## **Insurance Coverage**

The respondent shall, at respondent's own expense, obtain and keep in force insurance coverage, which shall be maintained in full force and effect during placement on the roster.

### **Professional Liability Insurance**

Respondent shall maintain minimum limits no less than \$1,000,000 per incident, loss, or person, as applicable. If defense costs are paid within the limit of liability, Respondent shall maintain limits of \$2,000,000 per incident, loss, or person, as applicable. If the policy contains a general aggregate or policy limit, it shall be at least two times the incident, loss or person limit.

### **Auto Insurance**

The Contractor shall maintain auto liability insurance, no less than the minimum required by Washington State law.

### **Workers' Compensation Coverage**

The respondent will at all times comply with all applicable workers' compensation, occupational disease, and occupational health and safety laws, statutes, and regulations to the full extent applicable. The state will not be held responsive in any way for claims filed by the Contractor or their employees for services performed under the terms of this contract.

*Thank you for your interest in working with the Commission.*