**COVER SHEET: Utility Benchmarking Completion and Data Verification Request for Proposals**

Owners applying to the HUD Green and Resilient Retrofit Program (GRRP) using Portfolio Manager benchmarking are required to submit a completed and verified Statement of Energy Performance and Water Scorecard with their application. Applicants may choose to use the included request for proposals (RFP) template if they wish but are not required to do so. If using the template, owners should replace red text with their information to individualize the request for their context, desired submission method, needs, and timeline. Specifically, owners may select among mail, email, or fax submission; and may assign points to whatever criteria they see fit.

Owners who will benchmark on their own and only need to hire a contractor to verify data should use the RFP titled “Utility Benchmarking Data Verification Request for Proposals” found [here](https://www.hud.gov/sites/dfiles/Housing/documents/Verification_Only_Sample_RFP.docx).

**[Owner]**

**REQUEST FOR PROPOSALS (RFP)**

**Utility Benchmarking Completion and Data Verification**

**PROPOSAL DEADLINE:**

All proposals must be received at the following [address, email, fax number] no later than [time], on [date].

**PROPOSAL SUBMISSION:**

The proposal must be submitted via [mail, email, fax] to [OWNER]. The submission must be clearly marked with the words “**RFP Utility Benchmarking Completion and Data Verification**.”

All proposals must be received at the following [address, email, fax number] by the proposal deadline stated above:

Owner

Individual Receiving RFP

Address

City, State Zip

OR

Owner

Email

OR

Owner

Fax number

[OWNER] reserves the right to reject any or all proposals for cause and to waive any informality in the submission process if it is in the public interest to do so.

During the period between issuance of this RFP and the proposed due date, no oral interpretation of the RFP’s requirements will be given to any prospective Offeror. Requests for interpretation (and other questions) must be made in writing by [email or letter] at least [number of days] days before the submission due date and time to the above [address or number].

During the period of advertisement for this RFP, [OWNER] may wish to amend, add to, or delete from the contents of this RFP. In such situations, [OWNER] will issue an addendum to the RFP setting forth the nature of the modification. All addenda will be sent to the respondents via email. It shall be the responsibility of each Respondent to ensure they have any/all additional addenda relative to this RFP.

General and Supplemental Conditions, and all other requirements contained herein, all of which are made a part of this Request for Proposals by reference.

**Utility Benchmarking Completion and Data Verification RFP**

**General Information**

The Green and Resilient Retrofit Program (GRRP) is newly funded through Title III of the Inflation Reduction Act of 2022, H.R. 5376 (IRA) Section 30002. If applying to GRRP’s Comprehensive cohort using Energy Star® score, building owners must complete and verify utility benchmarking in the Environmental Protection Agency’s (EPA’s) [Portfolio Manager](https://www.energystar.gov/buildings/benchmark) system.

**Introduction**

The [OWNER] is seeking proposals from contractors for the completion of utility benchmarking and data verification as required for application to the Department of Housing and Urban Development (HUD) Green and Resilient Retrofit Program Comprehensive cohort. The goal of this statement of work is to establish in Portfolio Manager a consumption baseline for normalized heating, cooling, lighting, and other electric, gas and water usage (not cost) at [property address]. To achieve this goal, the benchmarking contractor shall refer to and comply with all Portfolio Manager data submission processes and data requirements outlined in HUD Notice of Funding Opportunity (NOFO) FR-6700-N-91A.

The benchmarking contractor’s work shall include identification, collection, and entry of energy and water data into Portfolio Manager and subsequent verification of the accuracy of the entered data. [OWNER] staff will assist the contractor with gathering owner-paid utility bills (if applicable) and will provide access to buildings, apartments, and mechanical systems necessary to complete benchmarking. [OWNER] staff will also assist the Consultant by generating tenant utility consumption release forms and delivering them to the residents if necessary.

**Services**

Services shall include:

1. Meet with [OWNER] staff to prepare for utility benchmarking. Review data collection, submission, and verification requirements as detailed in HUD NOFO FR-6700-N-91A. Review planned schedule for completing utility benchmarking.
2. Work with owner to collect required property data (detailed in HUD NOFO FR-6700-N-91A Appendix II).
3. Work with utility provider to collect sufficient utility data (processes and data requirements detailed in HUD NOFO FR-6700-N-91A Appendix II). This may involve compiling previously collected utility data and/or releases as needed to obtain consumption data directly from each utility provider.
   1. For each owner-paid utility, the releases will be executed by the owner and obtained from the owner by the Contractor.
   2. For tenant paid utilities, the releases will be executed by tenants, obtained from the tenants by the owner, and obtained from the owner by the Contractor.
   3. For non-metered fuel sources, such as propane or heating oil, the Contractor will obtain releases from the owner to obtain 12 months of billing history from the supplier(s), or if suppliers are not willing/ capable of providing histories, the Contractor will obtain copies of bills from the owner.
4. If 100% of the property’s consumption data for the selected twelve-month period is not available (due to unit vacancies and/or tenant sampling), adjust usage data to 100% occupancy by estimating additional utility consumption given available data.
5. [OPTIONAL, remove if account already created] Create Portfolio Manager account.
6. Enter all data into Portfolio Manager and allow HUD account access. See instructions for sharing data access with HUD [here](https://www.hud.gov/sites/dfiles/Housing/documents/Instructions_Sharing_Benchmarking_Data_With_HUD.pdf).
7. Review data entry and resulting Statement of Energy Performance (SEP) and Water Scorecard for accuracy, sign and/or stamp the documents verifying that utility data is accurate and complete.

**Deliverables**

1. Signed and/or stamped Statement of Energy Performance and Water Scorecard for the property at the address listed above.
2. Consumption Narrative Report containing at a minimum:
   * 1. Property identifiers: iREMS Number or FHA Number, property name, property location, name of contractor, ownership name and contact information, management agent contact information, if any, etc.
     2. Confirmation that HUD account has been allowed access to submitted data.
     3. Confirmation that Portfolio Manager entry includes for all utilities associated with the property twelve consecutive months of:
        + Vendors/sources.
        + Use for residential: heat, hot water, lighting, a/c.
        + Use for non-residential: common/exterior lighting, laundry, office, maintenance shop, commercial.
        + Party responsible for payment, owner or tenant.
        + Any non-metered fuel source usage such as heating oil or propane.

**Deliveries Timeframes/Milestones**

|  |  |
| --- | --- |
| All necessary data collection | Within [number of] days after the effective date of the Notice To Proceed (NTP) |
| Data entry into Portfolio Manager | Within [number of] days after the effective date of the NTP |
| Correction of any data issues | Within [number of] days after the effective date of the NTP |
| Signed and/or stamped Statement of Energy Performance and Water Scorecard provided to owner | Within [number of] days after the effective date of the NTP |

**Submittals**

Proposals should be submitted via [mail, email, or fax], including the following information:

1. **Letter of Transmittal.** A transmittal letter signed by the Contractor authorized to submit the proposal and to make commitments on behalf of the company.
2. **Qualifications.** A description of the firm’s qualifications to perform the benchmarking. Requirements include:
   1. Benchmarking and data verification must be completed by an energy professional as required by the Multifamily Accelerated Processing (MAP) Guide. The MAP Guide defines energy professional as:

*Registered Architects or licensed professional engineers (PE) may serve as energy professionals provided that they have demonstrated the requisite experience. Other professional certifications for qualified energy professionals include one or more of the following: a) American Energy Engineers Association’s Certified Energy Manager (CEM) or Certified Energy Auditor (CEA) designations; b) American Society of Heating, Refrigerating and Air Conditioning Engineers (ASHRAE) High Performance Building Design Professional (HPBDP) designation; c) Building Performance Institute (BPI) Multifamily Building Analyst (MFBA) … or d) for townhouses and buildings up to three stories with no common space, a Residential Energy Services Network (RESNET) Home Energy Rating System (HERS) Rater. When building energy modeling is employed the lead modeler or energy professional must hold a professional certification specific to simulation modeling: ASHRAE Building Energy Modeling Professional (BEMP) or Association of Energy Engineers Building Energy Simulation Analyst (BESA).*

* 1. Have experience in collecting utility consumption data and in using industry-recognized methods for estimating missing data and normalizing it for property vacancies.
  2. Not be under suspension or debarment by HUD or involved as a defendant in criminal or civil action with HUD.
  3. Produce baselines that are well regarded in the marketplace in terms of content, timeliness, and responsiveness.
  4. Have the capacity to complete the services and prepare the deliverables in a time frame acceptable to the Owner.

1. **Staffing.** Provide a list of staff members who will work on this contract, including principals and staff- level personnel, along with qualifications of each.
2. **Evaluation Criteria.** Provide information addressing each of the evaluation criteria listed in the table below.
3. **Pricing.** Provide pricing for benchmarking and data verification. Show each staff member, hours proposed, and hourly rates. Also show any material and other costs, including travel, general, administrative, overhead, and profit.
4. **References.** Provide a list of clients, including the organization name, contact person, telephone number, and address as well as brief descriptions of the scope of work. Information provided for at least two similar benchmarking services completed within the last three years.
5. **Section 3 and WMBE.** The consultant must provide documentation regarding any claimed status as a Section 3 business or Women-Owned or Minority-Owned Business Enterprise.
6. **Insurance.** If on-site work is anticipated, the selected consultant will be required to provide a certificate of insurance certifying that they have insurance coverage that will cover their employees while on [OWNER] property and will protect the [OWNER] from liability for the actions of their employees. The insurance coverage should include Commercial General Liability with a combined single limit for bodily injury and property damage of not less than $1,000,000 per occurrence (with an aggregate of no less than $2,000,000) and Automobile Liability on owned and non-owned motor vehicles used on site for a combined single limit for bodily injury and property damage of not less than $1,000,000. [OWNER] should be included as an additional insured on both types of coverage.

Proposals that are incomplete with respect to the requirements listed above may be considered unresponsive and may be disqualified at [OWNER]’s discretion. The [OWNER] reserves the right to request additional information from any and all firms, to waive any informality in the procurement process, and to decline to award a contract to any and all firms, regardless of the responsiveness of the firms’ proposals.

In order to be considered qualified to perform the services under the Scope of Work; contractors must meet qualifications listed above.

**[Suggested] Evaluation Criteria:**

|  |  |
| --- | --- |
| Experience |  |
| Quality of proposed Capital Needs Assessment |  |
| Qualifications |  |
| Section 3, MBE/WBE |  |
| Pricing |  |