

MONTGOMERY COUNTY GREEN BANK TECHNICAL ASSISTANCE PROGRAM REQUEST FOR QUOTATIONS (“RFQ”)

RFQ Issuance Date: 12/19/2022

This is an open solicitation. Responses will be accepted on a rolling basis, but subsidies awarded through the program are subject to availability of funds. Service providers are encouraged to submit responses sooner rather than later.

Overview: The Montgomery County Green Bank (“Green Bank”) launched a technical assistance (“TA”) program to help define the business case for energy conservation measures (“ECMs”) on commercial properties in Montgomery County. Specifically, the Green Bank offers subsidies for up to 100% of the cost of ASHRAE Level I, Level II, Level III/ Investment Grade Audits, and feasibility analyses designed to inform building improvement plans and encourage property owners to comply with Building Energy Performance Standards (BEPS) requirements. Service providers will be engaged on one or more Energy Performance Studies (a “Study” or “Studies”) under the Program. Only the service providers that respond to this RFQ and are selected to participate will be eligible to join the Contractor Pool and receive Green Bank subsidies.

Eligible Property Types: The Green Bank TA program serves commercial entities. Eligible property types include but are not limited to office, industrial, retail, hospitality, common ownership communities, multifamily rental (market rate and affordable), and nonprofit-owned properties such as faith-based and educational institutions.

Scope of Work (“SOW”): Service Provider will conduct assessments, audits, and/or feasibility studies, and collaborate with the Green Bank to integrate Green Bank financing options prepared by Green Bank staff (with insights into how energy savings support financing) with the deliverables provided to property owners by the Service Provider.

Service Provider will be required to provide the “Required Services on All Projects”. “Additional Services as Needed on Projects may be proposed by the Service Provider, or the Green Bank may request upon review of a submission”¹:

- **Required Services on All Projects:** Conduct Energy Performance Studies that identify the current property conditions and the potential improvements that could deliver benefits. Studies will follow ASHRAE 211-2018 guidance for Level I, Level II, Level III/Investment Grade Audits and include the following unless otherwise indicated or the customer recently invested in a study that included the requirements below in its scope:
 - a. Benchmark building energy performance.
 - Benchmarking may be a standalone Study, i.e., it need not include any of the

¹ The level of effort should be commensurate with the degree of sophistication necessary for audit purposes. For example, a preliminary qualitative assessment of electrification feasibility and contractor pricing estimates (as opposed to supplier quotes) would suffice for a Level I audit, whereas more detailed assessments should include but not be limited to identifying fossil fuel-consuming equipment, identifying replacement equipment options, determining new power requirements, determining new electrical demand, and assessing electrical rate impacts.

- other requirements listed below.
- Properties required by Montgomery County to benchmark no later than June 30, 2024 but that have not yet complied must be benchmarked as part of the Study to receive a subsidy.
 - b. Estimate Utility, Federal, State, County, and other incentives available for the proposed measures.
 - c. Estimate energy savings and energy cost savings for the improvements over current conditions.
 - d. Assess feasibility, cost, and benefits of full property electrification².
 - e. Prepare a report containing the analyses conducted.
 - f. Include an assessment of financial strategies to achieve the recommendations.
 - g. Deliver a copy of the report to the property owner and the Green Bank.
 - h. Participate in a final discussion of the assessment results alongside the Green Bank.
- **Additional Services as Needed on Projects:**
 - a. Assess the feasibility of, and develop the business case for, energy related measures such as renewable energy technologies (e.g., solar photovoltaics, geothermal), electric vehicle charging infrastructure, and resiliency measures (e.g., battery storage) as appropriate.
 - b. Document how the county's Benchmarking program and Building Energy Performance Standards ("BEPS") regulations apply to the subject property. Identify to the property owner how to benchmark or comply with further BEPS regulations as appropriate.

Each Individual Program Assignment approved under this Agreement will identify the ASHRAE level services to be performed.

Green Bank Subsidy: The Green Bank will subsidize the cost of Studies performed. Owners of properties located in [Equity Emphasis/Focus Areas](#) ("EEAs") and multifamily property owners serving low- and moderate-income ("LMI") residents will be eligible for an increased subsidy. The Green Bank subsidy will be subject to a maximum amount that will be set upon receipt of sufficient responses to this RFQ. Maximum subsidy amount will be defined for each level of audit and subsidies for additional analyses listed in the SOW will be determined on a case-by-case basis.

Response Requirements: Please indicate your interest in participating in the Green Bank TA program Contractor Pool by emailing the following to TA@mcgreenbank.org:

- Contact information.
- Qualifications: A description of your capabilities to perform each type of analysis described in the Scope of Work section. Please include bios/resumes for key staff along with certifications that qualify each individual for the type of work they may perform (e.g., CEM, PE). Include at least one example of a recent comprehensive energy performance audit your firm has

² Electrification feasibility assessment may fall outside the scope of an ASHRAE audit. However, the Green Bank supports its County and State partners by obtaining and summarizing market feedback and, as such, seeks qualitative, and quantitative, when possible, indications of feasibility for electrification.

conducted and show how you would present the project economics and financing strategies/impacts for the project.

- Pricing: Provide separate quotes for a) the SOW's "Required Services on All Projects" for each of ASHRAE Level I, II, and III with the included items and b) each additional type of analysis described in the "Additional Services as Needed on Projects" section that your firm is qualified to perform and describe the nature of such services. If the "Additional Services as Needed on Projects" are not something you would typically price separately, please indicate that in your pricing narrative.
- Timing:
 - Contractors may submit questions pertaining to this RFQ to TA@mcgreenbank.org.
 - Responses are accepted on a rolling basis.

Process: The following describes the process for selection and undergoing TA projects under the Green Bank TA Program:

1. Green Bank staff will review responses to this RFQ.
2. The Green Bank will notify Service Providers of their selection for inclusion in the Contractor Pool.
3. Service providers and contractors will enter into an agreement with the Green Bank that details the following process for undergoing TA projects.
 - Service providers and contractors will 1) generate TA project leads themselves or 2) be invited to support on TA opportunities generated by the Green Bank.
 - A property owner or designee (e.g., property manager or the Service Provider) must apply through the Green Bank website portal for the proposed TA project to be accepted.
 - The Green Bank will inform the relevant parties if the application is approved, along with the approved budget.
 - The Green Bank will send an email to the contractor in writing of the approval of the subsidy for that Study.
 - Service Providers will conduct the Study (e.g., assessment, audits, and feasibility studies), and collaborate with the Green Bank to integrate Green Bank financing options prepared by Green Bank staff (with insights into how energy savings support financing) with the deliverables provided to property owners by the contractor.
 - The Green Bank will pay Service Providers for the approved budget upon (i) completion of the work; (ii) delivery of the report; and (iii) a presentation/discussion of the results with the property owner and Green Bank (this final step may be waived at Green Bank staff discretion).