



Senior Stewards Acting for the Environment

Request for Proposal Template

ENERGY AND GHG EMISSIONS REDUCTION AUDITING SERVICES



Created by

Senior Stewards Acting for the Environment (SSAFE)

SSAFE is a 501c3 Non-Profit.

A network of elder communities on the path to net-zero emissions.

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REQUEST FOR PROPOSAL: ENERGY and GHG EMISSIONS REDUCTIONS AUDITING SERVICES



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We are pleased to invite your firm to submit a proposal for building energy auditing services on the following project.

Project: Energy and GHG (Greenhouse Gas) Emissions Reductions Audit for
[Community Name]

Date: MM/DD/YYYY

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PROJECT PROFILE

[Community Name] is a Life Plan Retirement Community located at [street, city, state]. The building complex consists of independent living cottages and apartments, assisted living units, a skilled nursing facility and common facilities (see Attachment 1 for additional details). Additional information may be found at [insert website].

PROJECT GOALS

To contribute to global efforts to limit temperature rise to no more than 1.5°C above pre-industrial levels, [Community Name] has established the following greenhouse gas (GHG) reduction targets:

- **Achieve net zero CO₂ or preferably CO₂e emissions by 2050 at the latest.**



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(Note: This long-term goal alone is insufficient to meet the 1.5°C temperature target; one of the following interim goals must also be achieved.)

Interim Goals:

- Using base year XXXX, achieve at least a **50% reduction** in CO₂ or preferably CO₂e emissions by 2030.
- OR**
- For organizations with lower or newer baselines: using base year XXXX, achieve at least a **XX% reduction** in CO₂ or preferably CO₂e by 2030.

PROJECT OVERVIEW AND OBJECTIVES

This audit will serve as a comprehensive road map for achieving significant greenhouse gas (GHG) emissions reductions. The **REFERENCES** section provides foundational materials that outline best practices and methodologies for developing effective, actionable reduction strategies.

Measuring energy usage - whether in total consumption, source types, or system efficiencies - will inform emissions reduction estimates where direct measurement isn't feasible. The audit will provide key data necessary for prioritizing projects using multiple domains.

- Initial project costs
- Energy reduction costs per unit
- GHG (including embodied carbon as practicable) elimination costs per unit
- Life cycle costs
- Payback periods, e.g. simple, net present value (NPV)
- Social Cost of Carbon

Additionally, *[Community Name]* may pursue a green building certification program, with the specific program to be determined.

PROJECT TEAM

The project team will consist of *[substitute facility job titles here as appropriate]*:

Facilities Manager	[name]
Building Operation Staff	[name(s)]
Energy Consultant	[name]
Resident Representative(s)	[name(s)]

PROJECT PERIOD

The audit project's performance period extends from MM/DD/YYYY to MM/DD/YYYY.



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SCOPE OF WORK

Provide services for an *[campus-wide; building-level; XXX]* estimated energy and greenhouse gas (GHG) emissions reduction audit for Scopes 1 and 2 as defined by the GHG Protocol. Scope of Work is compatible with an ASHRAE Standard 211 Level 2 energy audit, with the addition of GHG CO₂ equivalent measurements or calculations.

The auditor shall coordinate with the facilities manager, building operations staff, energy consultant and other appropriate in-house personnel on scheduling *[substitute facility-specific job titles where appropriate]*.

Attachment 1 includes information about campus buildings and facilities to be included in the audit.

Attachment 2 lists the information *[Community Name]* is prepared to furnish to the firm selected to conduct the audit.

The following services are to be included in the bidder's response:

1. Project kick-off meeting:
Meet on site with all members of the *[Community Name]* project team and key representatives of the selected contractor, to review project goals and establish protocols for gathering data, inspecting buildings, on-site inspections, etc.
2. Facilitate an onsite meeting with staff and residents to hear concerns and suggestions regarding energy concerns and possible measures to be considered.
3. Review facility documents and data (see Attachment 2) including:
 - 3.1 Existing architectural and engineering construction documents, as available.
 - 3.2 The most recent 24 months of utility bills.
 - 3.3 Previous retrofit upgrades, retro-commissioning actions, energy studies and performance tests, carbon footprint studies, and GHG release studies.
4. Evaluate common facilities and a representative example of residential units.
5. Establish base case:
 - 5.1 Calculate Scope 1, 2 emissions based on applicable GHG emissions factors in metric tons of CO₂e.
 - 5.2 Emission calculations should be as building-specific as available data permit.
 - 5.3 Determine Site and Source Energy Use Intensity (EUI) in kBtu/sf; benchmark energy usage using Portfolio Manager to compare with similar senior living communities.



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6. Review the findings of [Community Name] most recent facility conditions assessment.
7. Determine the condition and efficiency of equipment, including building envelope, electrical service, system controls, HVAC systems, kitchen and laundry appliances, water consumption, and other relevant systems.
8. Identify and test major building systems to determine if they are operating efficiently.
9. Inventory refrigerants and estimate associated fugitive GHG emissions.
10. Meet with [Community Name] project team and provide an interim assessment:
 - 10.1 Summarize existing conditions findings
 - 10.2 Present inventory of on-site emissions sources
 - 10.3 Discuss potential emissions reductions measures (ERMs) for further study.
 - 10.4 Discuss potential packages of ERM's for further study.
 - 10.5 Work with the project team to develop targets for Scope 1, 2 and embodied carbon emissions reductions.
11. Develop recommended packages of GHG emissions reduction measures (ERMs) and show the following:
 - 11.1 In a table of audit findings listing ERMs, include estimated costs of measures, potential savings in Btus, and GHG emissions reductions in metric tons of CO₂e. See links to examples.

[DOE Table Of Example Audit Results](#)

[Augmented DOE Table of Example Audit Results](#)

[A Short Guide to the Augmented DOE Table of Example Audit Results](#)

- 11.2 Using the above calculate the abatement price, cost/metric ton CO₂e eliminated, of each ERM
 - 11.3 These elements and packages of elements should be tied to a timeframe linked to relevant 'trigger events' such as turnover in residential units, or major expansions and renovations.
12. Create a Life Cycle Cost Analysis, including ERMs, maintenance, and replacement schedules, decommissioning or de-construction.
13. Determine adequacy of electrical service to accommodate additional loads of new equipment such as solar electric systems, electric vehicle charging stations and heat pumps.
14. Create an overall combustion equipment phase-out strategy with estimated cost and a timeline. Any smaller scale more particular ERM's should fit into this overall strategy or be developed after a strategy is picked. See #16 below.
 - 14.1 Specify any initial measurements/tests necessary to determine the feasibility of various strategies.



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15. Develop a computer/mathematical model using energy modeling software to determine effectiveness of individual recommendations; highlight synergies between measures.
16. [Recommend strategic options for overall development of energy sources, e.g solar, geo-exchange.]
17. Develop a graphic suggesting implementation strategies over a ten year or other goal related time frames, indicating key milestones towards 50% emissions reductions.

DELIVERABLES

1. Submit a draft report and present findings in person or virtually, solicit and review comments by *[Community Name]* project team, and make modifications and clarifications in the report.
2. Present audit findings at an in-person meeting open to all residents and staff.
3. Provide the final audit report (a digital copy and 2 hard copies).

PROPOSAL REQUIREMENTS

Please include the following in your proposal:

1. Company Commitment and Experience
 - Provide two references for the firm (and the specific office of the firm, if applicable).
 - Describe your firm's commitment to carbon neutrality and its approach to sustainable practices.
 - Provide qualifications and relevant experience of your firm, including certifications, accreditations, and notable achievements.
2. Team Expertise and Roles
 - Identify the principal team members who will conduct the audit, detailing their roles and responsibilities.
 - Include their qualifications, certifications, and accreditations, along with references highlighting their expertise.
3. Relevant Projects and Outcomes
 - Provide information on at least two projects of similar size, scope, and complexity completed in the region, including contact details and, if available, sample reports.
 - Share examples of project recommendations that verifiably help clients achieve their GHG reduction goals.



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- Cite experience with seeking relevant grants, rebates, or incentives for ERM's selected by *[Community Name]*.
4. Innovation and Adaptability
 - Highlight innovative approaches your firm brings to ERM planning and projects.
 - Provide examples of how feedback and lessons learned from previous projects has been integrated into your current practices.
 5. Regional and Climate Zone Experience
 - Describe your experience working in the project region and its specific climate zone.
 - Detail your expertise in cost estimating for projects in the region.
 6. Expectations and Collaboration
 - Outline your expectations for support, resources, or collaboration required from *[Community Name]* during the project.

PROJECT BUDGET

Provide a fixed price proposal for the energy auditing services, including a detailed fee breakdown as follows:

- **In Office Investigation and Analysis:** Specify expected person-hours and corresponding hourly or daily rates.
- **On Site Investigation and Analysis:** Specify expected person-hours and corresponding hourly or daily rates.
- **Travel Expenses:** Include anticipated travel costs.
- **Additional Expenses:** Identify any other anticipated costs if applicable.

The proposal is for deliverables not for a certain number of hours.

PROPOSAL SUBMISSION AND AWARD SCHEDULE

- **RFP Issuance Date:** XX/XX/XXXX
- **Pre-Submission Meeting (Optional):** Scheduled on: XX/XX/XXXX, either on site or remotely.
- **Deadline for Auditor Questions:** Submit Inquiries by XX/XX/XXXX; responses will be distributed to all bidders.
- **Proposal Submission Deadline:** Proposals must be received by the close of business (COB) on XX/XX/XXXX.
- **Anticipated Date of Contractor Selection and Notification:** XX/XX/XXXX.
- **Anticipated Contract Award Date:** XX/XX/XXXX.



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REFERENCES

'AIA Deep Energy Retrofit - Request for Proposal Guidelines', American Institute of Architects et al, <https://www.aia.org/resources/8081-deep-energy-retrofits-rfp-guidelines>

[DOE GHG Emissions Reductions Audit](#)

[Video re DOE GHG Emissions Reductions Audit](#)

[DOE Table Of Example Audit Results](#)

[Augmented DOE Table of Example Audit Results](#)

[A Short Guide to the Augmented DOE Table of Example Audit Results](#)

[Paris Agreement](#)

[U.S. Nationally Determined Contribution](#)

[IPCC Synthesis Report 2023](#)

ATTACHMENT 1

1.1 Site Maps

1.2 Overview of any planned construction (If Applicable)

1.3 Overview of Site Utilities

1.4 Classes of Data Currently in Portfolio Manager

1.5 Energy Management System Data Classes (if applicable)

1.6 Summary of Campus Buildings

[Note: Adapt and organize this table as most appropriate for your campus.]



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Building	number of units	date of construction	type of construction	approx ft2
community center (dining, kitchen, laundry, library, auditorium, meeting rooms, offices, . . .				
other general purpose buildings (meetings? parties? overnight guests? etc.				
independent living cottages (free- standing and attached)				
independent living apartments				
assisted living facility/units				



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maintenance facility(ies)				
fitness center				
indoor pool				
other				

ATTACHMENT 2

Additional Facility information available upon request

[Specify as appropriate and available for your community.]

- Original construction documents.
- as-built and as-modified floor plans.
- Energy bills for the past 24 months and, if already created, a spreadsheet summarizing utilization and cost data.
- Previous facility condition assessments, if any.
- Previous energy audit reports and studies and related documents, if any.
- Depreciation schedules.
- Inspection reports (sewers; boiler; chiller, etc.).
- Building management system(s) and an explanation of its scope, data collection, and analysis capabilities.
- Building system maintenance records.
- Fire protection and life safety plans.
- Access to Data in Portfolio Manager
- Current protocol for renovations and energy upgrades during unit turnover



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- List of (50-60?) cottages and apartments whose residents have volunteered for a unit energy audit. [Consultant will identify representative sample of units for testing.] List will identify:
 - Unit Number
 - Model name
 - Most recent renovation/turnover date
 - Additions (sunrooms, etc.)
 - Orientation
 - Cottage: end nit or interior unit
 - Aptment: first, second, or third floor

