



Guide to Selecting a Contractor for Campus-Wide Energy and GHG Emissions Auditing Services

Purpose of This Guide

This guide provides a step-by-step approach for selecting a qualified and capable contractor to conduct a comprehensive energy and GHG emissions reduction audit, based on the SSAFE RFP “Energy and GHG Emissions Reduction Auditing Services” Template. It helps ensure a fair, transparent, and values-aligned selection process.

1. Assemble a Selection Committee

Include key stakeholders:

- Facilities Manager
- Building Operations Staff
- Energy Consultant
- Resident representative(s)

Ensure the committee understands the goals of the audit and the decision-making process.

2. Selection Framework: Criteria and Capabilities

Establish Evaluation Criteria

Base your evaluation on the **Proposal Requirements** section of the RFP.

Suggested evaluation categories and weighting:



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Evaluation Category	Points
Firm's Commitment to Sustainability	10
Experience with Relevant Projects	15
Team Expertise and Roles	15
Innovative and Tailored Approaches	15
Regional and Climate Zone Experience	10
Cost Proposal and Value	15
Collaboration and Responsiveness	10
References and Past Outcomes	10
Total	100

Feel free to adjust weights to match community priorities.

Alternatively, rather than relying on numeric scores, use a qualitative approach to evaluate each proposal. Focus on identifying which firm offers the strongest overall fit based on your community's goals, values, and practical needs.

Identify Key Qualities and Capabilities

Encourage your review team to reflect on the following guiding questions as they review proposals:

A. Alignment with Your Mission and Goals

- Does the firm demonstrate a clear understanding of your community's commitment to sustainability and net-zero emissions?
- Do they appreciate the unique nature of a senior living campus, including the importance of resident engagement and long-term planning?

B. Depth of Relevant Experience

- Has the firm conducted energy and GHG emissions audits for campuses or multi-building facilities of similar size and complexity?
- Do they have specific experience with life plan or retirement communities, or other mission-driven organizations?

C. Team Qualifications and Approach

- Are the individuals proposed for your project clearly identified and well-qualified?



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- Do they bring a mix of technical expertise (e.g., engineering, energy modeling, GHG accounting) and communication skills?

D. Thoughtfulness of Proposed Approach

- Does the firm propose a logical, thorough, and customized process for your audit?
- Are they attentive to your specific needs—such as phased planning or electrification readiness?
- Do they show an ability to develop actionable recommendations, not just technical data?

E. Collaboration and Communication

- Does the proposal indicate how the firm will work with your staff, residents, and sustainability leaders?
- Will they listen to your concerns and adapt to emerging needs during the project?

F. Practical Considerations

- Is the proposal clear, professional, and responsive to all elements of the RFP?
- Is the proposed timeline reasonable?
- Are the cost and deliverables clearly explained, and do they offer good value?

Recommendation:

Ask each committee member to independently reflect on these questions as they review the proposals, then come together as a group to share impressions. Use these guiding principles to discuss strengths and concerns and work toward consensus on the best overall fit.

3. Initial Screening: Minimum Requirements

Eliminate proposals that:

- Are incomplete or submitted late
- Do not include a fix-price cost proposal
- Lack qualifications or relevant certifications
- Do not demonstrate experience with Scopes 1 & 2 GHG auditing or ASHRAW Level 2 audits

4. Proposal Review Process

Use a rubric with the scoring criteria above. Each reviewer scores independently, then the committee meets to compare and discuss.



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Key Indicators to Look For:

- **Sustainability Commitment:** Has the firm adopted carbon neutrality targets themselves? Evaluate the depth of the firm's own sustainability practices. A strong internal commitment often translates to a better understanding and passion for the client's goals.
- **Team Qualifications:** Are lead personnel certified energy auditors (e.g., CEM, PE, LEED AP)? Do they have a proven track record in energy and GHG auditing, preferably in similar senior living communities? How long has the firm been providing energy and GHG auditing services
- **Comprehensive Roadmap:** The audit is intended to be a detailed roadmap. Look for proposals that promise actionable and prioritized recommendation.
- **Multi-faceted Analysis:** The RFP emphasizes the need to consider the initial costs, energy, and GHG Reduction costs, life-cycle costs, payback periods, and the social cost of carbon. Contractors should demonstrate their ability to analyze projects from these diverse perspectives.
- **Community Fit:** Does the firm demonstrate understanding of senior living campuses or similar facilities?
- **Clarity and Feasibility:** Are proposed methods and tools (e.g., modeling software) clearly explained?
- **Cost Estimating Expertise:** Accurate cost estimates are crucial for project planning. Prioritize firms with a strong track record of providing reliable costs estimates for energy efficiency and renewable energy projects in the region. What is their methodology for developing cost estimates, and how accurate have they been in the past?
- **Collaborative Approach:** Assess the contractor's communication style and their commitment to working collaboratively with the project team, staff, and residents. The kick-off meeting and the resident/staff are crucial elements of this collaboration.
- **Innovation:** Are new ideas and emerging technologies (e.g., phasing strategies, trigger-event planning) included?
- **Engagement:** Is there a plan for resident and staff engagement?



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5. Reference Checks

Contact the references provided. Ask:

- Was the audit completed on time and within budget?
- Did the audit produce actionable recommendations?
- Did the firm effectively demonstrate technical expertise, professionalism, and responsiveness?
- Did the firm communicate clearly and collaborate effectively?
- Were GHG and energy reduction goals met or on track?
- Would you hire them again?

6. Interviews (Optional but Recommended)

Assemble an interview committee of resident representatives and staff and invite top 2-3 firms. Ask scenario-based questions (e.g., "How would you prioritize ERM with long payback periods but high GHG impact?" Focus questions on:

- Their approach to unique features of your campus
- ERM prioritization strategy and software tools used
- Residents/staff engagement process
- Ability to identify funding/creative opportunities
- Flexibility in responding to changing needs or discoveries during the audit

7. Compare Costs Thoughtfully

Because the RFP is for deliverables, not hours, look for:

- Reasonable fixed pricing relative to the value provided
- Clear cost breakdown: on-site vs. in-office work, travel, etc.
- No vague or "to-be-determined" pricing
- Transparency around additional costs, if any

Avoid choosing solely based on lowest bid. Consider total value and long-term benefit

8. Make a Selection

After scoring and discussion:



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- Choose the highest scoring, best-fit contractor
- Document the decision rationale (especially if lowest bid is not chosen)
- Notify all firms of the decision and thank them for submitting

9. Finalize the Contract

Include:

- Scope of work as defined in the RFP
- Deliverables and timeline
- Payment schedule
- Points of contact and communication protocols
- Terms for adjustments or unforeseen issues

10. Post-Award Orientation

Schedule a kickoff meeting with the chosen contractor and full project team. Confirm:

- Data availability (see RFP Attachment 2)
- Building access protocols
- Staff and resident engagement steps
- Schedule for progress check-ins and deliverable



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