

RE: DBEDC RFP for Decarbonization Advisory Services (issued 4/29/2025)  
Questions & Answers  
Date: May 16, 2025

---

1. Would DBEDC be open to a turnkey proposal that includes not only an assessment with funding solutions, but also managing all available incentives and carrying the project through execution/implementation.

**Answer1: Yes, we are open to turnkey proposals.**

2. Regarding BERDO compliance, can DBEDC please specify the level of support it requires for the filing? Will Energy Star data be entered at the property level?

With the DBEDC planning to kick off their Building Decarbonization Advisory Services program on June 23<sup>rd</sup>, the BERDO reporting deadline (May 15<sup>th</sup>) will have passed already and the LBER reporting deadline (June 30<sup>th</sup>) would be a few days later. For this RFP, was the DBEDC hoping for BERDO/LBER assistance in preparing for next year's reporting deadlines?

**Answer2: BERDO Reporting of total annual energy and water use is currently managed at the property level by our property management agents either directly or through a third-party vendor. The management agents also currently manage contracting for the initial and periodic qualified third-party verification reporting. Energy tracking platforms utilized by the property managers include the BERDO portal, EnergyStar Portfolio Manager, and Wegowise. Most of our properties subject to BERDO are tracked on Wegowise.**

**While we don't require support for the qualified third-party verification reporting, we recognize that having one company perform all of our third-party verifications in the future may provide a framework that improves our ability to plan for decarbonization over time, therefore we would be open to proposals that offer future third-party verification reporting as an itemized and separately priced additional service.**

**The goal of this RFP is to obtain services that will assist DBEDC in assessing our current properties, determining a plan as to which properties to immediately prioritize for decarbonization, mapping out decarbonization strategies (whether Zero Over Time or a Deep Retrofit, and based on technical and financial considerations), and ultimately implementing emissions reductions required by BERDO.**

3. Could DBEDC outline its strategy for identifying energy efficiency opportunities in relation to funding possibilities and policy incentives for energy efficiency improvements or retrofits? Clarification on the preferred scope of these assessments would be greatly appreciated.

**Answer3: The goal of this RFP is to assist DBEDC in prioritizing its properties for energy efficiency improvements or retrofits in light of available funding possibilities and policy**

incentives. We are open to a range of options but would prefer to focus on solutions that offer both high impact and cost-effectiveness. This can include upgrades such as improved insulation, LED lighting, heat pumps and other renewable energy sources. Proposals should break out the costs for phasing (for example, an initial high level report addressing all properties with general impressions, identifying high need properties, and outlining potential solutions and available funding vs. subsequent more detailed property specific building level reports) or different levels of services available.

4. Questions regarding Administrative/Proposal Format/Submission Requirements:
- a. Does DBEDC consider a woman-owned business that is certified through Women's Business Enterprise National Council (WBENC) as an acceptable WBE firm?

**Answer 4a:** Yes.

- b. Page 4 of the RFP requests adherence to the proposal format. Could you specify the format requirements? Are there page limits? Are there limits on # of project references?

**Answer 4b:** We have no page limits for proposals. Please provide at least 3 project references for services provided in the past 3 years.

- c. Page 4 of the RFP requests, "submission of all required documentation (e.g., certifications, forms, disclosures)". Could you share the forms or specify which certifications are necessary?

**Answer 4c:** RFP submissions should include documentation responsive to DBEDC's outlined key evaluation criteria, including but not limited to the following:

- A Curriculum Vitae for your organization and key personnel who would perform the scope of services proposed
- Relevant Case Studies or Work Samples related to your organization's past or current work
- Reference List
- A narrative outlining your proposed approach for DBEDC's portfolio
- A detailed fee schedule breaking out costs for different types of services proposed. At a minimum, costs should be broken out for a high level assessment of all properties as a whole outlining a general strategy; more detailed secondary property specific assessments outlining specific roadmaps for decarbonization; and fees for BERDO verification reporting with the City of Boston.
- If an MBE/WBE/VBE, supporting documentation or narrative on how your organization meets this criteria
- Evidence of any relevant certifications, such as LEED, Passive House, etc.
- List of any pending litigation and certification that your organization is not on any government debarment or suspension lists

- d. Page 4 of the RFP requires compliance with legal requirements. Could you share which legal requirements or documents are required? Is there a sample contract you could share?

**Answer 4d:** We do not have a sample contract to share. Any engagement agreement proposed should NOT include provider limits of liability more stringent than its level of insurance coverage, which shall be at least \$1MM/\$2MM, or waivers of provider's negligence. Please also list any pending litigation your organization is involved in and provide certification that your organization is not on any government debarment or suspension lists.

- e. Are there expectations for any progress report submissions or meetings expected beyond the two milestones on page 2 of the RFP? Please indicate the expected number of sessions or presentations and whether the audience is DBEDC, other stakeholders, or the public.

**Answer 4f:** We should expect an additional meeting for the provider to present findings of the initial report.

5. Questions regarding Analysis Approach:

- a. Does DBEDC have any current performance goals established that you could share?

**Answer 5a:** As a baseline, the goal is to at least achieve BERDO 2035 or 2040 thresholds for DBEDC's subject properties.

- b. Are existing drawings, previous reports, and maintenance logs available for each property?

**Answer 5b:** Yes.

- c. Are there energy consumption data (primary source utility meters?) or utility bills available for each property? Is the data available for the last five years?

**Answer 5c:** Energy Consumption data is available for each property for at least the past 3 years. We likely have 5 years or more data for some of the properties.

- d. Do any of the buildings have controls/BMS?

**Answer 5d:** Not to our knowledge. Indigo Block may.

- e. Please confirm that the scope of work does not include detailed condition assessments, such as an ASHRAE Level 2 audit.

**Answer 5e: The scope of work should be geared towards a Zero Over Time approach. If a service provided, we would like to see broken out pricing for detailed condition assessments for properties deemed high priority for decarbonization.**

6. DBEDC Property Schedule. Page 2 of the RFP states that this project involves 18 residential and 2 commercial buildings. Does this mean a total of 20 buildings? In that case, 2 commercial buildings appear to not be shown in the DBEDC property schedule in the link. Are the commercial buildings excluded?

We counted 27 structures of varying sizes at 18 locations. Sister Clara and Geneva Apartments contain 6 and 5 structures, respectively. Please confirm if all 27 buildings are included.

**Answer6: Based on the City of Boston's records, DBEDC has 22 properties subject to BERDO. These properties include 30 buildings. It's currently unclear to us whether the Pierce Building is actually subject to BERDO as City records indicates the building is less than 20,000 SF. Excepting Pierce, that would be 21 properties and 29 buildings; please provide a breakout for Pierce in your cost proposal.**

7. Quincy Heights at 222-224 Quincy Street is listed twice. Is this a typo?

**Answer7: Yes, this is a typo. 222-226 Quincy Street is considered one building.**

8. How interested is DBEDC in exploring options for a "decarbonization-as-a-service" (DaaS) model? We don't typically work very closely with these kinds of providers, but rather present options for owner-financed decarbonization using available grant funding and incentivized financing mechanisms. We could explore available DaaS pricing models to present in the report, but I just want to know what to include in the proposal pricing.

**Answer8: DBEDC's strong preference is for options for owner-financed decarbonization using available grant funding and incentivized financing whereby DBEDC could coordinate decarbonization work to address capital needs of our properties as well, but we would be open to exploring DaaS pricing models.**

9. For photovoltaics (PV; aka solar), we can provide ownership financing estimates as well as estimates for a PPA model where the installer would maintain ownership and sell the electricity to the tenants at a fixed rate.

**Answer9: DBEDC is only interested in ownership PV estimates.**

10. Is DBEDC interested in also seeing results for the smaller buildings in your portfolio? I know that they weren't included in the RFP, but, given the methods we use for portfolio analysis, inclusion of the smaller buildings shouldn't add too much to the cost.

**Answer10: Yes, DBEDC would be interested in seeing results for smaller buildings in our portfolio. Please provide the additional cost for evaluating these additional buildings as a broken out line item in your cost proposal.**