

**REQUEST FOR QUALIFICATIONS &
PROPOSALS (RFQ) – WCHA 2026.18.1.3
ENERGY PERFORMANCE CONTRACTING (EPC)
– CONSULTING SERVICES**

**WESTMORELAND COUNTY HOUSING
AUTHORITY**

167 SOUTH GREENGATE ROAD

GREENSBURG, PA 15601

**ENERGY PERFORMANCE
CONTRACTING (EPC) –
CONSULTING SERVICES**

**WCHA - WESTMORELAND
COUNTY, PA.**

JUNE 2026

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INTRODUCTION:

REQUEST FOR QUALIFICATIONS (RFQ) – ENERGY PERFORMANCE CONTRACTING – CONSULTING SERVICES SUPPORTING WCHA IN AUTHORITY IMPLEMENTED EPC PROGRAM:

The Westmoreland County Housing Authority (WCHA) which is a public body and a body corporate and politic created under the Pennsylvania "Housing Authorities Law", for the purpose of providing affordable housing opportunities within Westmoreland County, Pennsylvania.

WCHA, the awarding Authority, is soliciting competitive proposals for Consulting, Engineering & Accounting Services for a self-implemented Energy Performance Contract (EPC). This is an Indefinite Quantity Contract with a term of two years and optional third – fifth year options at the sole discretion of the WCHA. Contract will be awarded to one (1) Offeror/Team. Indefinite Quantity is defined as when the WCHA has a need for EPC Consulting-Engineering & Accounting Services on an as needed basis within a specified time-period a Task Order will be issued. Task orders will be issued for each task needed and the Offeror must submit his/her fee based on rates provided in his/her submitted proposal to this solicitation.

Proposals will be received by registered mail, express mail or delivered to the WCHA – Administration Office, located at 167 South Greengate Road, Greensburg, PA. 15601 no later than **July 7, 2026 @ 10:00 A.M.** Late arrivals will not be accepted.

All proposals submitted in response to this solicitation must conform to the requirements and specifications outlined within this document, addendums and any designated attachments in their entirety.

The Westmoreland County Housing Authority and Westmoreland Non-Profit Housing Corporation conduct its procurement activities pursuant to 24 CFR 200, applicable federal and state laws, and the Authority's procurement policy. These documents are available for review at the Authority's office located at 167 South Greengate Road, Greensburg, Pennsylvania, 15601.

PUBLIC NOTICE:

WESTMORELAND COUNTY HOUSING AUTHORITY REQUEST FOR QUALIFICATIONS (RFQ) WCHA 2026.18.1.3 - ENERGY PERFORMANCE CONTRACTING (EPC) CONSULTING SERVICES

Westmoreland County Housing Authority (WCHA-Inc.) is requesting qualification & service proposals from qualified and experienced Energy-Engineering & Accounting Consultant Teams experienced in assisting Public Housing Authorities with self-implemented Energy Performance Contracting (EPC). The contract is classified as an Indefinite Quantity Contract with an initial term of two years, and all procurement shall comply with HUD procurement standards as set forth within 2 CFR Part 200, Subpart D.

Interested respondents may obtain, at no cost, the Request for Qualifications - Documents from the WCHA-Website located at www.wchaonline.com. In addition, an electronic (PDF) file copy can be provided by contacting Mr. Erik Spiegel – COO/Director of A&E Services at eriks@wchaonline.com or by phone at 724-832-7248 – ext. 3056 or Mr. Ed Primm – Director of Development Services at epimm@wchaonline.com or by phone at 724-832-7248 ext. 3015.

Interested respondents are required to respond by proposal submission (satisfying the requirements of this RFQ-Invitation) on or before, July 7, 2026, at 10:00 am.

A Pre-Proposal Virtual Briefing will occur via Zoom on June 12, 2026, at 10:00 A.M. (EST).

<https://wchaonline.zoom.us/j/82151407004?pwd=bU1EGA1YmlfbW9bhja8Xm6X9QLe1cN.1&from=addon>

Meeting ID: 821 5140 7004

Passcode: 617371

Michael L. Washowich, President

Westmoreland County Housing Associates, Inc

Advertisement Dates: May 27, 2026, and June 2, 2026 (Tribune Review)

May 27, 2026 (Pittsburgh Courier); May 27, 2026 (Mon Valley Independent)

RFQ INFORMATION AT A GLANCE:

(WCHA) - CONTACT PERSON	Erik Spiegel, WCHA, COO/Director of A&E Services, 724-832-7248, Ext. 3056 eriks@wchaonline.com Ed Primm, WCHA, Director of Development Services 724-832-7248, Ext. 3015 eprimm@wchaonline.com
HOW TO OBTAIN THE RFQ DOCUMENTS ON THE APPLICABLE INTERNET SITE	1. Log on to www.wchaonline.com Click on Procurement Drop Down Tab, click Current Solicitations, click See List, Log In to see list of solicitations or register if new user, click (REQUEST FOR QUALIFICATIONS (RFQ) WCHA 2026.18.1.3 download documents.
PRE-SUBMISSION MEETING	1. A PRE-SUBMISSION MEETING will occur virtually via ZOOM – on June 12, 2026, at 10:00 A.M. (EST). https://wchaonline.zoom.us/j/82151407004?pwd=bU1EGA1Ymlfwb9bhja8Xm6X9QLc1cN.1&from=addon Meeting ID: 821 5140 7004, Passcode: 617371
HOW TO FULLY RESPOND TO THIS RFQ BY SUBMITTING A PROPOSAL SUBMITTAL	1. As directed here within the RFQ document, submit all required documents within a bound proposal binder labeled WCHA – RFQ -2026-PA 18.1.3 –PROPOSAL SUBMISSION -ENERGY PERFORMANCE CONTRACTING (EPC) CONSULTING SERVICES As instructed within the RFQ document, submit three copies to the (WCHA). 2. Proposal depository is located at the Westmoreland County Housing Authority – Administrative Office Building – Rear Main Entrance – 167 South Greengate Road, Greensburg, PA. 15601
PROPOSAL SUBMITTAL RETURN & DEADLINE	Proposals are due by 10:00 A.M. (EASTERN STANDARD TIME) on JULY 7, 2026.
ANTICIPATED APPROVAL	It is anticipated that the (WCHA) will select a CONSULTANT GROUP to develop the project within the month of JULY 2026.

1.0 WCHA - RESERVATION OF RIGHTS:

- 1.1** WCHA reserves the right to reject any or all proposals, to waive any informality in the RFQ process, or to terminate the RFQ process at any time, if deemed by the WCHA to be in its best interests.
- 1.2** WCHA reserves the right not to award a contract pursuant to this RFQ.
- 1.3** WCHA reserves the right to terminate a contract awarded pursuant to this RFQ, at any time for its convenience upon 10 days' written notice to the successful group / proposer.
- 1.5** WCHA reserves the right to retain all proposals submitted and not permit withdrawal for a period of 60 days from the deadline for receiving proposals.
- 1.6** WCHA reserves the right to negotiate a Best and Final Offer with the selected group associated with all project costs and fees proposed.
- 1.7** WCHA reserves the right to reject and not consider any proposal that does not meet the requirements of this RFQ, including but not necessarily limited to incomplete proposals and/or proposals offering alternate or non-requested services.
- 1.8** WCHA will not compensate any proposer for any costs incurred in responding to this RFQ.
- 1.9** All addendums, clarifications and additional information pertaining to this solicitation shall be posted on the Westmoreland County Housing Authority's website www.wchaonline.com.

Consultant Teams are advised to check the Westmoreland County Housing Authority's website before submitting their proposal. WCHA assumes no responsibility for notification to potential respondents of the availability of addendums, clarifications, and additional information.

2.0 **PROJECT INFORMATION**

2.1 **ABOUT WCHA and PROJECT BACKGROUND:**

Westmoreland County Housing Authority (WCHA) which is a public body and a body corporate and politic created under the Pennsylvania “Housing Authorities Law”, for the purpose of providing affordable housing opportunities within Westmoreland County, Pennsylvania.

The WCHA is the fourth (4th) largest housing authority within the Commonwealth of Pennsylvania and largest affordable housing provider in Westmoreland County. Established in 1941, Westmoreland County Housing Authority (WCHA) has celebrated more than 80 years of providing safe, affordable housing for families and seniors throughout Westmoreland County. The WCHA and Non—Profit Affiliates currently own and manage forty-two developments consisting of 2,492 affordable housing units.

The following represents the Public Housing Communities which will be represent the inventory of facilities to be improved within the EPC Contract. The following developments are federal properties and shall be included in the Consultants/ Engineers scope of work for the Investment Grade Energy Audit and Energy Improvements:

PUBLIC HOUSING – 1,649 units		
BUILDING	ADDRESS	DESCRIPTION
18-1 East Ken Manor	200 Garlock Court New Kensington, PA 15068	Family – duplex homes
18-2 Park Manor	Park Manor Drive Monessen, PA 15062	Family – converted 3-story walkups
18-4 Kensington TH	12th Street & Fourth Ave. New Kensington, PA 15068	Family Townhouses
18-4 Central Towers	12th Street & Fourth Ave. New Kensington, PA 15068	Senior High-rise
18-5 East Gate Manor	Oneida & Schoonmaker Avenue Monessen, PA 15062	Senior High-rise
18-6 Valley Manor	Third Street Monessen, PA 15062	Senior High-rise
18-7 Pleasant Manor	Church Road Mt. Pleasant, PA 15666	Family – Garden Apts.
18-8A Westgate Manor	848 Donner Avenue Monessen, PA 15062	Senior High-rise
18-8B Highland Manor	1000 Highland Avenue Monessen, PA 15062	Family Townhouses
18-9 Arnold Manor	1632 Horne Boulevard Arnold, PA 15068	Senior High-rise

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18-10 Scottdale Manor	20 Pearl Street Scottdale, PA 15683	Senior High-rise
18-11 McMurtry Towers	189 Lincoln Avenue Vandergrift, PA 15690	Senior High-rise
18-12 Irwin Manor	100 Western Avenue Irwin, PA 15642	Senior High-rise
18-13 Latrobe Manor	1013 Jefferson Street Latrobe, PA 15650	Senior High-rise
18-14 Jeannette Manor	South Fourth Street Jeannette, PA 15644	Senior High-rise
18-15 Parnassus Manor	325 Main Street New Kensington, PA 15068	Senior High-rise
18-25 New Florence Manor	100 Osborne Street New Florence, PA 15944	Family Housing
18-26 St Clair Manor	100 Kuvinka Avenue Seward, PA 15954	Family Housing
18-27 New Stanton Manor	510 Wentsler Avenue New Stanton, PA 15672	Family Housing Walkup Apartments
18-28 Lower Burrell Manor	200 Sylvan Drive Lower Burrell, PA 15068	Senior High-rise
18-29 Trafford Manor	534 Brinton Avenue Trafford, PA 15085	Senior High-rise

The following Table represents the HUD Designated AMPS and Project Numbers:

AMP	Project Number	Site Name
001	PA18-01.0	East Ken Manor I & Annex
002	PA18-02.0	Park Manor
	PA18-08.2	Highland Manor
003	PA18-05.0	Eastgate Manor
	PA18-06.0	Valley Manor
004	PA18-08.1	Westgate Manor
005	PA18-07.0	Pleasant Manor
	PA18-10.0	Scottdale Manor
006	PA18-09.0	Arnold Manor
007	PA18-04.0	Kensington Manor

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008	PA18-11.0	McMurtry Towers
009	PA18-12.0	Irwin Manor
	PA18-27.0	New Stanton Manor
010	PA18-14.0	Jeannette Manor
	PA18-29.0	Trafford Manor
011	PA18-15.0	Parnassus Manor
	PA18-28.0	Lower Burrell Manor
012	PA18-13.0	Latrobe Manor
015	PA18-25.0	New Florence Manor
	PA18-26.0	St. Clair Manor

The WCHA completed the following Energy Performance Contracts starting in 2006.

WCHA – EPC Phase 1

WCHA – EPC Phase 2

WCHA – EPC Phase 3 & 3B

The following EPC Improvements were implemented as outlined within the Section 30 Matrix

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Westmoreland County Housing Authority

Energy Performance Contract - Phase III

Section 30 Matrix

PA018000001 Phase I Phase I Phase I Phase II Phase II Phase III Phase III	PA18-01.0 ECM-1 ECM-2 ECM-3 & 4 ECM-1 ECM-2 ECM-1 ECM-6	East Ken Manor I Lighting Efficiency Upgrade Water Conservation Furnace Replacements Window & Door Replacements Refrigerator and Stove Replacements Window & Door Replacements Water Conservation <i>Flappers Only</i>	PA018000010 Phase I Phase I Phase I Phase II Phase II Phase III Phase III	PA18-14.0 ECM-1 ECM-2 ECM-6 ECM-1 ECM-2 ECM-2 ECM-6	Jeannette Manor Lighting Efficiency Upgrade Water Conservation Installation Fan VFDs and New Motors Window & Door Replacements Refrigerator and Stove Replacements Condensing Boiler Installations Water Conservation <i>Flappers Only</i>
PA018000002 Phase I Phase I Phase II Phase III Phase III	PA18-02.0 ECM-1 ECM-2 ECM-2 ECM-1 ECM-6	Park Manor Lighting Efficiency Upgrade Water Conservation Refrigerator and Stove Replacements Window Replacements Water Conservation <i>Flappers Only</i>	PA018000011 Phase I Phase I Phase II Phase III Phase III	PA18-15.0 ECM-1 ECM-2 ECM-2 ECM-3 ECM-6	Parnassus Manor Lighting Efficiency Upgrade Water Conservation Refrigerator and Stove Replacements MUA Replacement Water Conservation <i>Flappers Only</i>
PA018000007 Phase I Phase I Phase I Phase II Phase II Phase III Phase III Phase III	PA18-04.0 ECM-1 ECM-2 ECM-3 & 4 ECM-1 ECM-2 ECM-1 ECM-2 ECM-6	Kensington Manor Lighting Efficiency Upgrade Water Conservation Furnace Replacements Window & Door Replacements Refrigerator and Stove Replacements Window Replacements Condensing Boiler Installations Water Conservation <i>Flappers Only</i>	PA018000013 Phase I Phase I Phase II Phase III	PA18-17.0 ECM-1 ECM-2 ECM-2 ECM-6	Latrobe Townhouses Lighting Efficiency Upgrade Water Conservation Refrigerator and Stove Replacements Water Conservation <i>Flappers Only</i>
PA018000003 Phase I Phase I Phase I Phase I Phase II Phase II Phase III Phase III	PA18-05.0 ECM-1 ECM-2 ECM-5 ECM-6 ECM-1 ECM-2 ECM-6	Eastgate Manor Lighting Efficiency Upgrade Water Conservation Modular Boilers Installation Fan VFDs and New Motors Window & Door Replacements Refrigerator and Stove Replacements Water Conservation <i>Flappers Only</i>	PA018000013 Phase I Phase I Phase II Phase III	PA18-19.0 ECM-1 ECM-2 ECM-2 ECM-6	Greensburg Townhouses Lighting Efficiency Upgrade Water Conservation Refrigerator and Stove Replacements Water Conservation <i>Flappers Only</i>
PA018000012 Phase I Phase I Phase I Phase I Phase II Phase II Phase III Phase III	PA18-13.0 ECM-1 ECM-2 ECM-5 ECM-6 ECM-1 ECM-2 ECM-2 ECM-6	Latrobe Manor Lighting Efficiency Upgrade Water Conservation Modular Boilers Installation Fan VFDs and New Motors Window & Door Replacements Refrigerator and Stove Replacements Condensing Boiler Installations Water Conservation <i>Flappers Only</i>	PA018000008 Phase I Phase I Phase II Phase III	PA18-20.0 ECM-1 ECM-2 ECM-2 ECM-6	Vandergrift Townhouses Lighting Efficiency Upgrade Water Conservation Refrigerator and Stove Replacements Water Conservation <i>Flappers Only</i>
PA018000005 Phase I Phase I Phase II Phase III Phase III	PA18-07.0 ECM-1 ECM-2 ECM-2 ECM-1 ECM-6	Pleasant Manor Lighting Efficiency Upgrade Water Conservation Refrigerator and Stove Replacements Window Replacements Water Conservation <i>Flappers Only</i>	PA018000008 Phase I Phase I Phase I Phase II Phase II Phase III	PA18-24.0 ECM-1 ECM-2 ECM-7 ECM-2 ECM-6	Lower Burrell Townhouses Lighting Efficiency Upgrade Water Conservation Replacement of Trane Chiller Refrigerator and Stove Replacements Water Conservation <i>Flappers Only</i>
PA018000004 Phase I Phase I Phase I Phase I Phase II Phase II Phase III Phase III	PA18-08.1 ECM-1 ECM-2 ECM-5 ECM-6 ECM-2 ECM-4 ECM-6	Westgate Manor Lighting Efficiency Upgrade Water Conservation Modular Boilers Installation Fan VFDs and New Motors Refrigerator and Stove Replacements Whalen System Upgrade / Vertical Fan Coils Water Conservation <i>Flappers Only</i>	PA018000015 Phase I Phase I Phase II Phase II Phase III	PA18-25.0 ECM-1 ECM-1 ECM-2 ECM-6	New Florence Manor Lighting Efficiency Upgrade Window & Door Replacements Refrigerator and Stove Replacements Water Conservation <i>Flappers Only</i>
PA018000002 Phase I Phase I Phase II Phase III	PA18-08.2 ECM-1 ECM-2 ECM-2 ECM-6	Highland Manor Lighting Efficiency Upgrade Water Conservation Refrigerator and Stove Replacements Water Conservation <i>Flappers Only</i>	PA018000015 Phase I Phase I Phase II Phase II Phase III	PA18-26.0 ECM-1 ECM-2 ECM-1 ECM-2 ECM-6	St. Clair Manor Lighting Efficiency Upgrade Water Conservation Window & Door Replacements Refrigerator and Stove Replacements Water Conservation <i>Flappers Only</i>
PA018000006 Phase I Phase II Phase III Phase III	PA18-09.0 ECM-2 ECM-2 ECM-2 ECM-6	Arnold Manor Water Conservation Refrigerator and Stove Replacements Condensing Boiler Installations Water Conservation <i>Flappers Only</i>	PA018000009 Phase I Phase I Phase II Phase II Phase III	PA18-27.0 ECM-1 ECM-2 ECM-1 ECM-2 ECM-6	New Stanton Manor Lighting Efficiency Upgrade Water Conservation Window & Door Replacements Refrigerator and Stove Replacements Water Conservation <i>Flappers Only</i>
PA018000005 Phase I Phase I Phase I Phase II Phase III	PA18-10.0 ECM-1 ECM-2 ECM-6 ECM-2 ECM-6	Scottdale Manor Lighting Efficiency Upgrade Water Conservation Installation Fan VFDs and New Motors Refrigerator and Stove Replacements Water Conservation <i>Flappers Only</i>	PA018000011 Phase I Phase I Phase II Phase II Phase III	PA18-28.0 ECM-1 ECM-2 ECM-1 ECM-2 ECM-2 ECM-5 ECM-6	Lower Burrell Manor Lighting Efficiency Upgrade Water Conservation Window & Door Replacements Refrigerator and Stove Replacements Condensing Boiler Installations Emergency Generator & Switchgear Upgrade Water Conservation <i>Flappers Only</i>
PA018000008 Phase I Phase I Phase I Phase I Phase II Phase III Phase III	PA18-11.0 ECM-1 ECM-2 ECM-5 ECM-8 ECM-2 ECM-2 ECM-6	McMurtry Towers Lighting Efficiency Upgrade Water Conservation Modular Boilers Whalen System Conversion Refrigerator and Stove Replacements Condensing Boiler Installations Water Conservation <i>Flappers Only</i>	PA018000010 Phase I Phase I Phase II Phase II Phase III	PA18-29.0 Phase I ECM-2 ECM-1 ECM-2 ECM-2 ECM-6	Trafford Manor Phase I Water Conservation Window & Door Replacements Refrigerator and Stove Replacements Condensing Boiler Installations Water Conservation <i>Flappers Only</i>
PA018000009 Phase I Phase I Phase I Phase I Phase II Phase III Phase III	PA18-12.0 ECM-1 ECM-2 ECM-6 ECM-2 ECM-2 ECM-6	Irwin Manor Lighting Efficiency Upgrade Water Conservation Installation Fan VFDs and New Motors Refrigerator and Stove Replacements Condensing Boiler Installations Water Conservation <i>Flappers Only</i>	PA018000014 Phase I Phase I Phase II Phase III	PA18-39.0 ECM-1 ECM-2 ECM-2 ECM-6	W. Hempfield Townhouses Lighting Efficiency Upgrade Water Conservation Refrigerator and Stove Replacements Water Conservation <i>Flappers Only</i>
PA018000012 Phase I Phase I Phase II Phase III Phase III	PA18-13.0 ECM-1 ECM-2 ECM-2 ECM-2 ECM-6	Latrobe Manor Lighting Efficiency Upgrade Water Conservation Refrigerator and Stove Replacements Condensing Boiler Installations Water Conservation <i>Flappers Only</i>	PA018000013 Phase I Phase II Phase III Phase III	PA18-40.0 ECM-1 ECM-2 ECM-1 ECM-6	Derry Townhouses Lighting Efficiency Upgrade Refrigerator and Stove Replacements Window Replacements Water Conservation

3.0 EPC – CONSULTING SERVICES SCOPE:

It is the intent of the WCHA to have a new 2026-2027 Investment Grade Energy Audit of the Public Housing Communities completed to identify Energy Conservation Measures (ECM's) that can be self-implemented by the WCHA.

The EPC Consultant hired under this RFQ shall work with and coordinate with the Architect and/or Engineer procured by the Authority to produce construction documents where necessary to publicly bid out contracts in accordance with WCHA Procurement Policy and as required to perform the Self-Implemented EPC.

WCHA is requesting proposals from qualified offerors for financial consulting and engineering services under this contract shall include but not limited to; a new Investment Grade Energy Audit, a review of the existing EPCs with recommendations and/or development of new utility cost and consumption savings initiatives, recommendation for new ECMs projects from such initiatives.

Services shall include but are not limited to the tasks listed below:

- ✓ Assistance with the calculation of Public Housing Operating subsidy eligibility, to ensure that the Authority is maximizing the benefit of the EPC program and is in full compliance with HUD regulation and EPC approval documents.
- ✓ Provision of recommendations regarding the maximization of future revenues.
- ✓ Provision of recommendations regarding accounting processes related to the EPC and associated financing.
- ✓ The Energy Consultant will assemble a draft financing plan with financing options for the EPC. The Plan will define all the sources of funds blended into the project and integrate HUD's energy incentives. The financing plan may also include a request for financial quotes and the process for soliciting bids for financing. The Consultant will assist with securing any additional financing and/or refinancing.
- ✓ Explore alternative energy approaches to minimize or eliminate electric resistance heating of properties and to incorporate renewable energy resources.
- ✓ Investment Grade Energy/Utility Auditing of all properties listed within this RFQ:
- ✓ Assist in the evaluation of HUD's rate reduction incentives.
- ✓ Investigate any utility rebates and assist the WCHA in obtaining said rebates.
- ✓ Review of utility consumption baselines.
- ✓ Review of existing EPC cost avoidance reports.

- ✓ Development of water/energy savings estimates.
- ✓ Development of savings verification procedures/protocols and reports.
- ✓ Completion of all required HUD forms to format all data for review and justification of EPC viability to obtain HUD approval.
- ✓ Provide technical specifications with technical cut sheets and brand names for all ECM apparatus, fixtures, or appliances. Collaborate with the Authority' Architect/Engineer to produce Construction specifications and/or plans suitable for public bidding and construction or installation of ECMs under the EPC,
- ✓ Review construction/installations of ECM measures to ensure compliance with specifications.
- ✓ Perform ECM life cycle analysis, and Development of Commissioning plans.
- ✓ Consult and coordinate with HUD Energy Center and HUD Pittsburgh Field Office to obtain all required HUD Approvals.
- ✓ Perform all Measurement and Verification (M&V) Services during the term of the financing agreement.

Note: WCHA will issue a task order for each service it requires and the successful Offeror will submit a detailed breakdown of their fee for such task; this fee and breakdown shall be based on the hourly rates that the successful Offeror submitted in conjunction with their proposal in response to this RFQ. Approval will be subject to an independent cost estimate verifying the reasonableness of the price.

4.0 STATEMENT OF QUALIFICATIONS

WCHA is seeking a highly qualified Consultant Teams comprised of: Energy and Building Systems Engineers, Financial Analysts and Project Financing & Accounting Analysts experienced in Public Housing Authority – Self Implemented Energy Performance Contracting with HUD reimbursement for qualified debt service payments meeting the goals and objectives as described in this RFQ. WCHA will be looking for qualifications that demonstrate the respondent's experience and proven successful track record for EPC projects the meet the goals of this RFQ.

Please aim to be thorough but keep your responses direct and relevant. Your Statement of Qualifications must include the following:

- **Cover Letter.** The cover letter should highlight the developers' experience, capability and understanding of WCHA goals and objectives, and how the developer would achieve them. Please provide the legal form of the developer entity by submitting the response to the RFQ and identify the project development team and key personnel. If the developer is partnering with other business entities, please identify those partnerships / business relationships. Include the lead developer contact information. The cover letter should be signed by a person authorized to commit to executing legal agreements.
- **Consultant Team:** Provide a detailed overview of participating consultant team member(s), identifying key personnel and their roles and responsibilities. Describe the qualifications and project experience of the key personnel that are most relevant to the conditions of this Energy Performance Contract – Consulting Project. Include resumes of key members who will contribute to critical elements of the project.
- **Development Approach:** Describe how the consultant team expects to approach this EPC project, including identified energy development options, estimated costs, development factors that will lead to the long-term success of this project.
- **Relevant Project Experience:** Provide information on up to three EPC projects that are similar in nature to the self-implementation approach proposed within this RFQ. For each project, indicate the name, location, date, and general description of the development. Indicate prior public housing - private partnerships in which consultant team have engaged in projects similar in type to this upcoming project.
- **Financial Capability.** Provider documentation that demonstrates the consultant team's capability to secure financing for the development of the EPC project consistent with the goals and objectives outlined in this RFQ. Identify the financing types and provide examples of financing the consultant team has used in past projects that are like the proposed EPC effort. Provide reference letters or other written evidence of current relationships with financing institutions and financial support from lending and/or financial institutions related to this RFQ.

- **References.** Provide three references from recent projects, including name, title, organization, telephone, and email address for previously executed projects of a similar scope or program. This reference must be able to speak of direct experience with the key team members proposed for this project.
- **Submittals are to be addressed to:**
Mr. Erik Spiegel, COO/ Director of A & E Services
WCHA
167 South Greengate Road
Greensburg, PA 15601

5.0 SELECTION PROCEDURES & REQUIREMENTS:

5.1 GENERAL REQUIREMENTS:

WCHA will receive and evaluate proposals according to the criteria contained within this RFQ. A decision will be made to verify that the proposers and proposals are Responsive and Responsible. Responsive and Technically Competitive Proposals will be technically reviewed including consideration of costs.

Responsiveness test, each proposal will be reviewed for the following:

- i. Conformance to the RFQ instructions, format, presence of all required documentation and attachments.
- ii. Minor informalities, irregularities and apparent clerical or mathematical mistakes that are unrelated to the substantive content of the proposal.

Responsible test, each proposal will be reviewed for the following:

- iii. Proposal was received prior to the date and time identified within the RFQ or Addendum.

5.2 EVALUATION COMMITTEE:

WCHA will designate a Committee of three (3) people to review Developer/Builder proposals and participate in the interview sessions outlined in section 5.3. The Committee members will independently score the proposals from a technical and content approach and offer their rankings of proposals – Step 1 Scoring. The rankings will be tabulated, and the two top-rated developers will be notified and scheduled for a follow-up meeting. The committee will then rank the two developers considering the final Oral Presentation related to development concepts being offered, discussion on estimated costs and financing. The Committee led by the WCHA-WCHA – CEO / President will then conduct negotiations with the highest ranked Developer/Builder to secure a development commitment based on an approved development concept, development budget, and financing. Prior to negotiations the COO/Director of A&E Services will tabulate the proposals received to develop a competitive range. The tabulation will be shared and evaluated by the committee prior to negotiations with the two top-ranked developers. The WCHA – Review Committee may be but not limited to the following personnel: CEO- President, COO/Director of A & E Services and Director of Development Services. Ranking Criteria will be distributed via addendum.

5.2 SCORING CRITERIA:

This RFQ will be scored with the rule of award based on the proposal that best meets the evaluation criteria, which are as follows:

SCORING CRITERIA FACTOR	SCORING WEIGHT (%)
Past EPC (size and scope) projects, especially with Public Housing Authorities as lead agency clients. In addition, relevant public housing experience / services related to but not limited to renewable energy, utilities, HUD subsidies	0-15
Detailed examples of past performance in terms of cost control, quality of work, schedule compliance, HUD compliance, HUD Approvals ...	0-30
EPC – Offeror Profile outlining general capabilities, capacities and strengths of Offeror or Offers Team, as well as a brief overview of Offeror's history. Additionally, resumes of the principals and key personnel that will be involved with the project and WCHA.	0-20
Detailed statement of EPC and Related Services that will be performed as well as an outline of the tasks involved to produce the Investment Energy Audit, Design of Energy Conservation Measures (ECMs), Construction Procurement Support Services, Construction Administration Support Services, Accounting and Financial Modeling Services, HUD Coordination Services, Measurement & Verification Services, HUD Reporting Services. A clear statement of what services will be performed as well as a line-item outline of the major tasks involved in producing the project from concept phase through implementation phase, and into closeout phase. This outline shall reflect the Offeror's expertise knowledge of the overall project.	0-20

ORAL PRESENTATION – Section 5.3 Interview Presentation and Interaction with WCHA Evaluation Team	0-15
TOTAL SCORE	100 Max.

5.3 ORAL PRESENTATION:

WCHA may elect to interview all consultant teams who have submitted complete and timely proposals in accordance with this RFQ; however, the WCHA reserves the right to interview Developers in a competitive range if necessary. If WCHA conducts such interviews, each Developer within the competitive range shall make an oral presentation to the Evaluation Committee and participate in a question-and-answer session. The purpose of the oral presentation and the question-and-answer session is to permit the Evaluation Committee to fully understand and assess the qualifications of each Offeror and Offeror Team, EPC Development Approach, EPC - Development Budget, EPC - Financing ..., EPC - HUD Submission - Coordination and Approval, The submission will be scored at the conclusion of the oral presentation – Step 2 Scoring.

Each Offeror / Offeror Team will give up to 30-45 minutes to make the presentation. At the end of the initial presentation, the committee will conduct a question-and-answer session, and the Evaluation Committee may break for 10-15 minutes for the Evaluation Committee to assess the presentation and prepare questions. The Offeror will then respond to questions from the Evaluation Committee.

The presentation will be made by the Offeror / Offeror Team personnel who will be assigned the key management / client contract for this project. As a minimum, the Offeror / Offeror Team shall be represented by the Offeror / Offeror Team principal officer and any key consultants or development team members that are deemed vital to the proposed development. The job functions of the persons attending the presentation will be an indication of the Offeror / Offeror Team assessment of the key areas of responsibility that are deemed essential to the successful completion of the project.

5.4 TABBED PROPOSAL FORMAT:

To evaluate the offers received, all proposals submitted in response to this RFQ must be formatted in accordance with the sequence noted. Each category must be separated by numbered index dividers or tabs (which number extends to the WCHA can identify each tab without opening the proposal) and labeled with the corresponding tab reference also noted below. None of the proposed services may conflict with any requirement published herein or issued by addendum.

Proposals shall be submitted with indexed tab sections based on the requested components of the RFQ. If the proposers elect to submit additional tabbed sections those shall be identified and added to the end of the submission. As a minimum the following tabbed sections shall be provided:

TAB 1	Proposal Transmittal Letter
TAB 2	Executive Summary
TAB 3	Forms: ▪ Statement of non-collusion ▪ Equal Employment Opportunity Certification
TAB 4	Organizational Chart for the Proposal Consultant Group with sub-consultants identified if known.
TAB 5	Organizational Chart for individual Consultant Group Members • Key Personnel – Resumes Included
TAB 6	Summary of any Legal Issues - Liabilities – Proceedings (2023-2026)
TAB 7	Team Qualifications and Experience (Collectively and/or individually) Note: Detailed representative project information shall include but need not be limited to: Client, EPC Project Development Type, Location, Development Budget, Financing, Public – Private Financing Involved, Contractors, Consultant Fees ...
TAB 8	References related to representative projects identified within TAB 7
TAB 9	Service Fees -Line-Item Summary

6.0 PROPOSAL SUBMISSION REQUIREMENTS:

6.1 Submission Conditions:

All proposals must be submitted and time-stamped received in the designated WCHA Admin Office no later than the submittal deadline stated herein (or within any ensuing addendum). A total of 3 original signature copies of the proposal shall be placed in a sealed package and addressed to:

MR. ERIK SPIEGEL, COO/DIRECTOR OF A&E SERVICES
WESTMORELAND COUNTY HOUSING AUTHORITY
167 SOUTH GREENGATE ROAD
GREENSBURG, PA. 15601

The package exterior must clearly denote the above-mentioned RFQ number and must have the Developer name and return address. Proposals received after the published deadline will not be considered.

The proposal shall comply with the following requirements:

- Submittals shall be in a 3-Ring Binder or a manufactured edge binder system.
- Proposals shall be signed by all principal(s) of the Developer Team.

In addition to the submission requirements identified within this section, the proposal shall address the submission content requirements of Section 6.0.

DO NOT FOLD OR MAKE ANY ADDITIONAL MARKS, NOTATIONS OR REQUIREMENTS ON THE DOCUMENTS TO BE SUBMITTED! DEVELOPER/BUILDER are not allowed to change any requirements or forms contained herein, either by making or entering onto these documents or the documents submitted any revisions or additions; and if any such additional marks, notations or requirements are entered on any of the documents.

7.0 EPC - CONSULTANT GROUP - RESPONSIBILITIES:

7.1 Contact with the WCHA:

It is the responsibility of the Consultant Group /Team to address all communication and correspondence pertaining to this RFQ process to the COO/Director of A&E and/or Director of Development Services only. Consultant Team must not make inquiries or communicate with any other WCHA staff member or official (including members of the Board of Commissioners) pertaining to this RFQ. Failure to follow this requirement may be the cause for the WCHA not to consider a proposal received from any Consultant Team who may not have followed this directive.

7.2 Addendums:

All questions and requests for information must be addressed in writing to the COO/Director of A&E and/or Director of Development via email. The COO- Director of A&E may respond to all such inquiries in writing by addendum to all prospective Consultant Groups. During the RFQ solicitation process, WCHA will not conduct any *ex parte* (a substantive conversation— “substantive” meaning, when decisions pertaining to the RFQ are made. WCHA will not conduct conversations that may give one prospective Consultant Team an advantage over other prospective Consultant Groups.

7.3 Pre-proposal Virtual (Zoom) Meeting:

The scheduled pre-proposal virtual meeting will occur as identified within this request for proposals. The purpose of this meeting is to provide prospective Consultant Teams with WCHA’s full understanding of the RFQ documents and development purposes. At this meeting, the WCHA will conduct a brief overview of the RFQ documents, including the attachments. Additional information pertaining to EPC requirements and expectations will be presented. Prospective Consultants Teams may also ask questions; however, WCHA may ask questions to be formally delivered in writing prior to a response being delivered. Whereas the purpose of this conference is to review: the RFQ documents, present the WCHA vision for the EPC Program to be Self-Implemented.

8.0 EPC – RFQ PROCUREMENT PIGGYBACKING:

Intergovernmental Agency (including Public Housing Agencies) piggybacking under 2 CFR 200 refers to utilizing another entity's existing contract for procurement, permitted under 2 CFR §200.318(e) to foster efficiency. Non-federal entities (NFEs) must ensure the original contract was competitively bid, including necessary federal provisions (e.g., 2 CFR 200 Appendix II), and does not exceed the scope of the original procurement.

"COOPERATIVE PURCHASING / PIGGYBACK CLAUSE: Pursuant to **2 CFR § 200.318(e)** WESTMORELAND COUNTY HOUSING AUTHORITY (WCHA) (Lead Agency), and other non-federal entities, including [Public Housing Authorities, local governments, school districts, or non-profits], may purchase goods or services under the same terms, conditions, and pricing established by this contract. The Contractor agrees to extend these provisions to such entities. Each 'piggybacking' entity shall be responsible for its own orders, and [WCHA] shall bear no liability for any agreements or disputes between the Contractor and a third-party entity."

Note: If this EPC - RFQ and subsequent Consultant Agreement is used by Piggybacking Agencies use this when drafting a separate agreement that references the Lead Agency's contract.

"INCORPORATION OF MASTER AGREEMENT: This Agreement is entered into by [Piggybacking Agency] based on the competitive procurement conducted by [WCHA] (Contract #XXXX). All terms, conditions, and pricing of the Master Agreement are hereby incorporated by reference as if fully set forth herein. To the extent there is a conflict between this Agreement and the Master Agreement, the terms of this Agreement shall prevail for the purposes of [Piggybacking Agency]'s purchases."

"FEDERAL COMPLIANCE ADDENDUM: The Contractor acknowledges that this purchase is funded by federal grants and agrees to comply with all applicable provisions of **2 CFR Part 200, Appendix II**, including but not limited to Termination for Cause and Convenience, Equal Employment Opportunity, and the Davis-Bacon Act (if applicable). Contractor further certifies that it is not debarred or suspended from federal programs."

APPENDIX A: PROPOSAL FEE SCHEDULE:

In accordance with the WCHA Request for Qualification for Consulting & Engineering Services for a Self-Implemented Energy Performance Contract we (attached) submit our hourly rates for such services.

OFFEROR TEAM MEMBER	HOURLY RATE <i>Hourly Rate- All Rates to Include Overhead & Profit by employee</i>
Principal	
Senior Architect	
Senior Engineer	
Project Architect	
Project Engineer	
Technical Office Staff (CAD, Analyst...)	
Construction Support Staff	
Measurement & Verification Staff	
Office Administration & Clerical Staff	
Principle – Accounting & Financial	
Accountant & Financial Analyst	
Other Role:	
Other Role:	
Other Role:	
Other Role:	

Annual Escalation Percentage: _____ %

(Maximum amount of the hourly rates listed above will increase each contract year).

SUBCONSULTANTS & STAFF

Subconsultant Name	Scope of Services	Service Fee Schedule and Hourly Rates

Name and Address of Offeror Firm:

The undersigned certifies, that he has familiarized himself with the terms and conditions as outlined in the WCHA - RFQ for Consulting & Engineering Services for a Self-Implemented Energy Performance Contract dated June 2026, and further certifies under the penalties of perjury that this proposal is in all respects bona fide, fair and made without collusion or fraud with any other person. As used in this subsection the word "person" shall mean natural person, joint venture, partnership, corporation or other business or legal entity. The undersigned further certifies under penalty of perjury that the said undersigned and any partner(s) or subcontractor(s) to be used under this contract, is not presently debarred from doing public work in the Commonwealth of Pennsylvania or Federal Government.

By:

Signature of Authorized Officer Date

Printed Name

Title