

THE GREEN ASSESSMENT CONSULTANT'S SCOPE OF WORK

Consultant Responsibilities

GREEN ASSESSMENT CONSULTANTS' REQUIREMENTS INCLUDE:

- **Conduct** an energy audit for the subject property based on the ASHRAE Level 1 standard, as amended per this description.
- **Analyze** energy and water consumption data and related equipment on site with the goal of identifying energy and water conservation measures (EWCMs) for the property.
- **Review** the available utility bills and estimate consumption based on comparable building data appropriate for the subject building type, use and location.
- **Provide** the cost savings for each ECWM. The total owner-paid energy and the total owner-paid water projected to be saved also must be expressed as percentages of the total existing consumption. The estimated labor and materials cost to implement each EWCM must be provided.
- **Perform** a site visit to evaluate the building envelope, lighting, plumbing fixtures, HVAC system, appliances, current operations and maintenance.

A Green Assessment consultant must do the following:

SITE VISIT

- **Inspect** two units of each type in each distinct phase or each unique building construction type
- **Inventory** typical existing energy and water systems and equipment to understand equipment type/model, age, efficiency and condition
 - HVAC
 - Lighting
 - Domestic hot water
 - Kitchen appliances
 - Kitchen and bathroom plumbing fixtures
 - Laundry
 - Non-domestic water uses, such as irrigation and pools
- **Evaluate** the building envelope, including walls, windows and roof
- **Interview** knowledgeable staff to record current controls and operating systems

ASSEMBLE BUILDING DATA

- **Assemble** consumption bills for owner-paid utilities
- **Assemble** consumption bills for tenant-paid utilities for a minimum of minimum of 10% of the units if provided by the property owner
- **Create** a utility rate pricing schedule summary for electric (\$/kWh), gas (\$/therm), other purchased fuels and water (\$/gallon)

ANALYZE ENERGY AND WATER

- **Conduct** an end-use analysis to determine building energy and water inputs and outputs when whole building data is available and analyze energy use by load
- **Identify** energy and water conservation measures (EWCMs)
 - Electrical use reduction
 - Fuel use reduction
 - Water use reduction
 - Alternative energy sources (e.g., renewable energy, on site generation)
 - Building envelope improvements
- **Provide** energy and water savings estimates using spreadsheet analysis, energy modeling software or similar techniques
 - Indicate cost savings for each EWCM
 - Indicate percentage of consumption saved for each EWCM
 - Indicate EWCM savings as a percentage of total building consumption for use paid by the owner

- **Provide** estimated labor and material costs to implement all EWCMs
- **Delineate** owner and tenant savings as appropriate

PROVIDE A WRITTEN REPORT INCLUDING:

- **Execute summary**
- **Facility description**
- **Description** of EWCMs with estimated consumption savings, implementation costs and simple payback period

BENCHMARKING

- If the subject is **master metered**, utilize Energy Star Portfolio Manager to obtain an Energy Star score.
- If the subject is **individually metered** and the borrower provides 10% of tenant utility bills, utilize
- **Energy Star Portfolio Manager** to obtain an Energy Star score
- **Create** a building profile in Energy Star Portfolio Manager using whole building energy and water data or estimates and the building characteristics
- **Assign** Freddie Mac permission to access the Energy Star building profile

Consultant Qualifications

On-site work must be conducted by staff trained to identify and record needed energy and water information for related systems and equipment and to document building envelope information.

Energy analysis and report recommendations must be completed by energy engineers with 5 years of experience conducting energy audits and one of the following credentials:

- Building Performance Institute (BPI) building analyst certification for multifamily (MFBA)
- Association of Energy Engineers (AEE) Certified Energy Manager designation (CEM)

SELLER/SERVICER RESPONSIBILITIES

The Seller/Service must provide the following information:

- Property name and address
- Occupancy
- Onsite contact
- Property configuration (garden, hi-rise, etc.)
- Gross floor area for all buildings
- Parking area (sf)
- Number of each bed/bath combination, average unit size, number of buildings / number of floors, number of phases, year built
- Type of heating and cooling systems in each building
- Number of pools, number of heated pools
- 12 months of records of water and energy consumption paid for by the property owner in CSV or Excel format
- 12 months of records of water and energy consumption in CSV or Excel format for all units if paid by the property owner and when available if paid for by the tenants
- Any previously completed property condition reports or energy studies