

2023 Integrated Physical Needs Assessment (IPNA) and Technical Assistance Service Provider Request for Qualifications (RFQ) Frequently Asked Questions

Questions asked during IPNA RFQ Webinar (2/23)

Please click [here](#) to view the full recorded webinar.

Program Eligibility and Requirements

Do NYSERDA FlexTech Consultants that focus mainly on multifamily buildings qualify for the Multifamily Building Solutions Network prerequisite for IPNAs?

No, not at the moment; however, there is a chance that future iterations of the RFQL will expand the eligibility requirement to include Multifamily FlexTech Consultants or other networks of energy solutions providers.

When applying to the Multifamily Building Solutions Network, can you receive partial credit for a section?

Yes, you can receive partial credit for certain section. For example, there are 15 points you can earn for submitting case studies - if a point is deducted from one of the case studies for not having "Installation Oversight", it is possible to receive 14/15 points.

Please note, there are three minimum requirements: Certifications/Accreditations/Licenses, Industry Experience, and Insurance. No points are awarded for meeting the Minimum Requirements. All applicants must meet the standards set by the Minimum Requirements. Applications that do not demonstrate compliance with the minimum requirements will not be scored

Application Specifics

Must "Part C – Fee" display fixed fees or can Teams provide hourly costs or a low-to-high range of costs?

You can display additional pricing information in the "Notes on Bid Pricing" field or as an attachment. However, the IPNA Application review team prefers that you provide fixed fees. In the instance of range pricing, your team should reference the higher end of the cost-estimate range.

If you're a FlexTech Consultant, must "Part C – Fee" mirror the Schedule of Fees provided to the FlexTech network.

No. FlexTech only pertains to energy studies. We understand that the Physical Needs portion of IPNAs may affect pricing.

Questions received by E-mail

Program Eligibility and Requirements

Is applying for an IPNA a requirement for all affordable housing projects?

If HCR, HDP, or HCR is funding the project, an IPNA will likely be a requirement. Please refer to the guidelines of the funding opportunity.

More specifically, if HCR is funding a Mod Rehab level I or II, as defined in the [Sustainability Guidelines](#), an IPNA is required.

Are Energy Assessors allowed to be listed on the pre-qualified list multiple times with different Needs Assessors and vice-versa?

Yes. Companies can be part of multiple provider teams.

Are Provider teams allowed to specialize in a specific region of the state?

Yes. For example, you can choose to only provide services in the Western New York region and are not obligated to also cater to New York City.

Please confirm that the following IPNA Standard requirement is valid: “for assessments that take place in New York City, at least one member of the Needs Assessor team shall have taken, or plan to take within 6 months of becoming a pre-qualified provider, the DoHMH Healthy Buildings Trainings for HPD-financed projects. The DoHMH Healthy Buildings Training Certificate is valid for three (3) years.”

For HPD-Financed buildings, The DoHMH Healthy Buildings Trainings is not required, but strongly encouraged. The IPNA Standard will be updated to reflect that the training is not a hard requirement. If you would like to complete the webinar, please have all interested employees fill out this [online form](#). Please note, the certifications are now only valid for two years.

Teams that perform HPD projects are also encouraged to take the [Climate Ready Buildings Training](#).

Application Specifics

Must the “Energy Assessor” and “Needs Assessor” collaborate on the written application?

Applications may be written and submitted by one firm in the Provider partnership. However, please indicate the division of responsibilities and ensure that your partner is aware of all IPNA commitments detailed in the RFQL & the IPNA Standard.

Are the items in “Appendix A” required with an application? Are “Doing Business Data Forms” required?

Please only provide the information that is available and relevant to your application. “Doing Business Data Forms” are not required, but may be requested at a future date.

What “No Conflict of Interest” form should be submitted with the application?

For Teams that will perform HPD and HDC projects, please use the following form:

[NYC Mayor's Office of Contract Services](#)

For Teams that will perform HCR projects, please use the following form:

[HCR Vendor Assurance of No Conflict of Interest and Detrimental Effect](#)

Do the Needs Assessors need to complete the letter of intent and commitment letters? If so, are any boilerplates able to be shared?

There is no template for these statements. They are typically composed on your company letterhead towards the beginning of your RFQ package outlining your intent in applying, qualifications, history, etc., for your firm and any other partner consultants you plan to use when performing and composing an IPNA.

Is just proof of insurance required or must a specific entity be listed as covered or Additionally Insured (and if so, who?)

As per the IPNA standard, we require proof of professional liability insurance, as well as worker’s compensation and employers’ liability insurance. The agencies do not have to be identified as additionally insured or certificate holders at this time.

Are Audited Financial Statements from the Most Recent Year Mandatory?

They are preferred. However, if you do not have an Audited Financial Statement, please provide a similar document that can summarize your business operations (ie. an internal unaudited financial statement).

Is “Part C – Fee” Proposal region specific?

No. If you have any pricing differences that are regional, you can note those in the “Notes on Bid Pricing” box. Please fill out this section for all application packages.

IPNA Tool and Standard

In the IPNA Template, are the “Print” tabs digitally bound together enough to satisfy the requirements of the “IPNA Written Report”? Are the “Print” tabs only meant to serve as an appendix to a more comprehensively written ASTM E 2018-15 + ASHRAE 211 report?

The “Print” tabs exist so that providers can easily capture the information in the IPNA Template and insert those printed tabs into a more comprehensive report; the “Print” tabs also do not exist for every tab, so they would not include the full IPNA scope. Furthermore, we may have instances of projects with multiple buildings that may warrant having multiple IPNA templates completed, but the write-up of the report should provide clarity on the overall scope of the project across all buildings.

Please ensure that the “IPNA Written Report” is a narrative summary. For best practices, leverage ASTM E 2018-15 + ASHRAE 211, as they serve as the basis for the IPNA Standard.