

**Request for Qualifications (RFQ)
for LEED for Homes Providers**
to support the
LEED for Homes Rating System



October 19, 2009

Request for Qualifications for LEED for Homes Providers to Support the LEED for Homes Rating System

This Request for Qualifications (RFQ) includes background information on the LEED for Homes Program, the submittal instructions for organizations interested in applying to be selected as LEED for Homes Providers, and a six-page submittal form.

Submittals are due to USGBC by 5 PM EST on Monday, November 30th, 2009. Incomplete submittals will be disqualified.

Overview

The largest and most active area of green building has been in the residential market. While the numerous local and regional green building programs have made great strides in serving hundreds of home builders, thousands and thousands of other builders have not had access to a strong green building initiative that provides third-party verification, comprehensive education and brand recognition.

In November 2007, the U.S. Green Building Council (USGBC) launched a national LEED for Homes program. The purpose of this program is to:

- Recognize and reward the top 25% of new homes, in terms of environmental stewardship; and
- Educate builders and related industry professionals on how to build homes that utilize best practices, such as those included in the LEED for Homes Rating System.

The purpose of this Request for Qualifications (RFQ) is to solicit organizations in key target markets to apply to become LEED for Homes Providers.

New LEED for Homes Providers will be selected based on a combination of criteria:

- Existing builder and multi-family developer relationships, with strong capabilities to gain market traction for LEED for Homes in their respective markets.
- The company's demonstrated ability to train and supervise green raters.
- The organization's knowledge, depth and experience in the fields of green homebuilding (including energy efficiency, IEQ, water efficiency, sustainable use of materials and land).

Over the next couple of years, it is expected that each LEED for Homes Provider will manage a team of no fewer than 10-20 green raters who are delivering LEED for Homes verification services over a multi-state area.

What is the LEED for Homes Program?

Building on the success of USGBC's LEED rating systems for the commercial sector, LEED for Homes has been designed to target the residential market. LEED for Homes is a voluntary program. Its purpose is to actively promote the transformation of the mainstream home building industry towards more sustainable practices. LEED for Homes is a collaborative initiative that is actively working with *all sectors of the home building industry*. LEED for Homes can be applied to single and multi-family homes (currently, up to three stories) and is intended for both market-rate and affordable housing. USGBC is also running a pilot for mid-rise housing (4-6 stories) throughout 2009.

The LEED for Homes Rating System is part of the comprehensive suite of LEED assessment tools offered by USGBC to promote sustainable design, construction, and operations practices in buildings nationwide.

The LEED for Homes program includes 4 key components:

- The LEED for Homes Rating System;
- A delivery system – via the LEED for Homes Providers, and their team of green raters;
- A comprehensive educational program; and
- A national brand awareness program.

Program Goals

LEED for Homes is targeting the top home builders (the innovators and the market leaders) – those who build new homes that incorporate best-practice environmental features. In the long term, USGBC's goal is to certify 25% of all newly constructed homes annually. A near-term goal is to ensure LEED for Homes Provider presence within the top 50 MSAs¹ in the U.S.

In the short term, USGBC plans to establish LEED for Homes Providers in local markets that show the greatest growth potential, based on the combined assessment of the following factors:

- Largest number of annual housing starts;
- Established presence of the ENERGY STAR for Homes Program, and related home energy rating capability;
- Established presence of local green home building expertise;
- Established presence of a local USGBC chapter; and
- Substantial numbers of home builders interested in participating in LEED for Homes.

Program Status

The national rollout of the LEED for Homes Rating System occurred in November 2007, after a 2 1/2 year pilot demonstration phase. Currently, there are thirty four LEED for Homes Providers that offer verification services in markets throughout the US.,

¹ The top 50 MSAs are the top 50 Metropolitan Statistical Areas, or top 50 major cities in the US.

Currently, there are over 16,000 registered LEED for Homes units. Generally, it takes about 8-18 months for a newly registered project to be designed, built and certified. Approximately 3,000 LEED Homes have been certified to date.

Target Markets for New LEED for Homes Providers

Based on submittals received under this RFQ, USGBC will make its selections for new LEED for Homes Providers to support the largest local markets in the United States.

Each LEED for Homes Provider will be selected by USGBC to provide verification services in their local market area. Generally, the term local market is used to refer to all communities in a local multi-state area surrounding a major city. In many cases, Providers will be able to support a region that includes multiple markets.

USGBC may select more than one LEED for Homes Provider for some markets (e.g., where a single Provider cannot meet USGBC's goals for that market). Further, any Provider that substantially fails to meet their performance goals (per their Provider agreement with USGBC), may have their Provider Agreement rescinded. **USGBC reserves the right to select new Providers in any market at any time.**

Additional LEED for Homes Providers will be selected each year, depending on the level of market demand for the program in each local market.

No LEED for Homes Provider will be allowed to have an exclusive delivery territory.

Key Roles for Stakeholders

What is a Provider?

LEED for Homes Providers are organizations that will manage verification services for USGBC.

The long term viability of the LEED for Homes program depends primarily on the skills and experience of the LEED for Homes Providers, and their ability to deliver consistent, high quality verification services in each market across the country. Hence, USGBC plans to tightly manage the selection and performance of their LEED for Homes Providers.

Providers are expected to offer five primary types of LEED for Homes support services:

- ✓ Recruit builders to commit to build homes that meet the LEED for Homes requirements;
- ✓ Facilitate the training of green home raters in both green home building practices and the LEED for Homes program requirements;
- ✓ Facilitate the verification of LEED Homes by trained green home raters.
- ✓ Verify that these LEED Homes, in fact, meet the LEED for Homes requirements; and
- ✓ Assist builders and raters to promote the LEED for Homes brand and related sales messaging.

It is anticipated that LEED for Homes Providers (and their teams of green raters) will negotiate market-based fees for these services with their builder customers. USGBC also requires that each Provider will have a well-defined quality assurance program for

the verification of LEED Homes. Each provider may develop its own quality assurance program. However, at a minimum, the quality assurance program should include:

- ✓ The use of fully trained and qualified green home raters who will verify compliance of the builder's homes with LEED for Homes requirements;
- ✓ Formal verification of the home as LEED for Homes compliant and conferring the LEED for Homes rating (certified, silver, gold, or platinum);
- ✓ A formal record-keeping system and data storage/sharing protocol that will be used to provide USGBC with information about each program participant;
- ✓ A statistically-based set of analysis procedures to summarize and interpret the verification data (i.e., most common and least common measures adopted, most common failures); and
- ✓ A third-party (hired by the Provider) to provide random spot-checking of the LEED for Homes verifications performed by their green raters (including paperwork, field inspections, and performance testing).

Providers will absolutely be held accountable to USGBC's established QA processes. USGBC reserves the right to formalize at any time these QA requirements for Providers as part of a robust program of certification requirements for these organizations.

Other Important Roles for Stakeholders

There are several important stakeholder roles needed to support the LEED for Homes program, ***other than*** the LEED for Homes Provider. Providers are expected to offer ***only one*** of the many types of support services that will be needed by the green home building industry.

Each Provider will be expected to work with a team of 10-20 subcontracted green home raters. Each green home rater may work with 10-30 builders. There will also be a substantial need for a broad range of green home builder educational services.

In your decision to apply as a LEED for Homes Provider, please consider whether your organization excels at:

Managing large teams of green home raters,

Or

Excels in some of the other roles described below.

Each of these other stakeholder roles (separate and distinct from the Provider's role) is briefly described below. Please review the other roles listed below to determine if any of these types of stakeholder roles aligns with your organization's core competencies.

Also note that USGBC plans to enforce a policy that ***individuals involved in the design and/or construction of a LEED for Homes project may not be involved in the verification of that project.*** Organizations that design and/or build LEED Homes cannot verify their own homes. The 3rd party nature of the LEED for Homes verification and certification process will be strictly enforced.

Green Home Raters

The LEED for Homes Provider has full responsibility for the hiring, mentoring, supervising and performance of a team of green home raters. However, the Provider's primary role is not to be a green home rater. The Provider must review and approve the green rater's verification work. A green home rater provides in-the-field inspection and performance testing services at each and every LEED Home.

Green home raters are encouraged to team with organizations that choose to submit a response to this RFQ. LEED for Homes Providers must submit qualifications for team members (either an employee or subcontractor) that have the following *minimum* qualifications for a green home rater:

1. Participation in a LEED for Homes Program Review training;
2. At least six classroom days of green home building training or equivalent (including indoor environmental quality, water efficiency, sustainable use of materials and sites);
3. At least one year of experience with a green home building program or equivalent; and
4. At least one year of experience with residential performance testing, including blower door testing, duct leakage testing, and air flow testing.

Ideally, above and beyond these minimum qualifications, a Provider's green home rater(s) will be able to demonstrate a high level of competency in several broad areas, including:

1. Technologies and practices used in green home building;
2. The documentation requirements of the LEED for Homes program;
3. Effective methods of marketing and selling LEED homes; and
4. Customer service to builder customers.

RESNET Certified Home Energy Raters with green home building experience, or individuals with equivalent training, are encouraged to be a part of a Provider's team. Green home raters serving in existing green home building programs (with appropriate training in diagnostics) are also encouraged to be part of a Provider's team.

Green Home Designers and Consultants

Many home builders are unfamiliar with green home building strategies and technologies. These builders will all require some degree of assistance as they change their home designs to become increasingly green. The design and consulting community are expected to play a vital role in providing detailed design and in-field consulting services to these builders.

The Green Building Certification Institute (GBCI) has recently introduced a new LEED credential for green home designers and consultants. It is called LEED Accredited Professional for Homes (LEED AP Homes). LEED AP Homes are trained to help a Project Team to successfully design and construct a LEED home. They also play a supporting role in preparation of some of the verification support materials for a LEED for Homes project (including, the accountability forms and the durability plan). Details of this new credential can be found a on the GBCI.org website.

LEED for Homes Faculty

USGBC has selected and is training LEED for Homes Faculty to deliver all USGBC-authorized LEED for Homes educational workshops. Additional Faculty will be selected as determined by market demand. For additional information on how to become a LEED for Homes Faculty member, please direct your questions to faculty@usgbc.org.

USGBC highly encourages other organizations to provide green home building related trainings to the home building industry. Organizations that specialize in offering educational programs may choose to partner with USGBC as an Educational Provider.

Why be a LEED for Homes Provider?

The benefits of being a LEED for Homes Provider include:

Market Differentiation - be the first LEED for Homes Provider in your market to promote and support the LEED for Homes brand;

Grow Your Business - demand for green homes is growing, and LEED offers a recognized and meaningful national brand;

Influence - provide valuable and needed input to the early development of the LEED for Homes initiative; and,

Recognition - be acknowledged as an early adopter and leader in green home building through national promotional efforts by USGBC.

USGBC's Commitment to Support the LEED for Homes Providers

USGBC is committed to the success of the LEED for Homes program. USGBC intends to empower Providers to work directly with home builders to assist them to successfully meet the LEED for Homes requirements.

USGBC is committed to supporting their LEED for Homes Providers in the following ways:

National Green Standard. USGBC has developed and will maintain a consensus-based set of green home building standards.

Consistent National Implementation. USGBC will ensure that the LEED for Homes Providers have a consistent understanding of the latest interpretations of the consensus-based LEED for Homes Rating System, including any recent rulings by the LEED for Homes Committee and its technical advisors;

Facilitation of Training. USGBC will ensure consistent national delivery of training for all LEED for Homes program participants through the exclusive, centralized facilitation of USGBC-approved LEED for Homes Workshops.

Branding. USGBC will restrict use of the LEED for Homes brand. Providers will be the only USGBC-authorized verifiers of LEED Homes.

Recruiting. USGBC will actively assist in recruiting builders of LEED Homes.

Marketing. USGBC will actively promote Providers.

LEED for Homes Provider Training

Selected LEED for Homes Providers are expected to attend a Provider training in February of 2010.

Selection Criteria for LEED for Homes Providers

USGBC will select new LEED for Homes Providers in preparation for the expansion of the LEED for Homes program *into new markets* in December 2009. It is anticipated that these Providers will be distributed across the U.S. and serve various types of home builders in these markets (e.g., custom, production, affordable, and multi-family builders). Further, USGBC anticipates working with various types of organizations (e.g., interested existing green home building programs, state and local governments, utilities, non-profits, the U.S. military, etc.). USGBC's intent is to select organizations that can capably and actively support the verification of LEED Homes. More specifically, the USGBC will select Providers with the demonstrated skill sets presented in Exhibit 1.

**Exhibit 1
Recommended Skill Sets for LEED for Homes Providers**

Selection Requirements	Critical Skill Sets			
	<i>Skill Set #1</i> Program Administration and Staff Management	<i>Skill Set #2</i> Green Home Building Verification Services	<i>Skill Set #3</i> Other Green Home Building Support Services (e.g., training, consulting, etc.)	<i>Skill Set #4</i> ENERGY STAR for Homes Verification Services
Level of Experience	At least 3 years Provider supervision of at least three green or energy raters.	At least 1 year (Including at least one green rater, having completed approx. 20 certified green homes.	At least 1 year Including at least one staff (or consultant), that has delivered additional support services (e.g., training, consulting, etc.) to at least 5 local builders.	At least 3 years Including at least three energy raters, each having completed approx. 60 certified ENERGY STAR Homes.
Training	Provider must have completed at least 16 hours of classroom training on green home building.	Green raters must have completed at least 16 hours of classroom training on green home ratings.	N/A	Energy raters must have completed at least 24 hours of classroom training on the Home Energy Rating System (or equivalent).

Continued on page 9.

Organizational Commitment	Submit ½ page description of Provider’s Management Plan, including: 1. Training plan and budget 2. QA plan and budget 3. Marketing plan and budget	Submit ¼ page description of qualifications for each staff member (or contractor) that is proposed to deliver LEED for Homes verification services.	Submit ¼ page description of qualifications for each staff (or contractors) that are delivering other support services for LEED for Homes (or for other GHB programs or future plans).	N/A – included in Organizational Commitment for Skill Set #2
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USGBC will select LEED for Homes Providers using the following additional criteria:

Ability to Open Up New Markets for LEED for Homes

- Ability to enlist and serve custom, production, multifamily and affordable home builders.
- Ability to enlist at least five affordable housing projects a year
- Ability to serve a market that is not currently served by a LEED for Homes Provider.
- Ability to engage the local USGBC chapter, HBA and local government.
- Broad and deep existing relationships with builders and home building stakeholders in your local market.
- Ability to develop new relationships with local builders and developers

In-Field Rater Management and Organizational Experience

- Experience in managing a team of green home raters.
- Ability to develop and successfully implement a quality assurance process for your team members to ensure the consistent delivery of high quality ratings
- Willingness to work with USGBC to deliver LEED for Homes trainings for green home raters, builders, and other market stakeholders

Industry Experience of Team

- Experience in and knowledge of green home building overall
- Familiarity with LEED for Homes
- Experience in the home building industry
- Specialized green building experience (e.g., energy efficiency, sustainable materials, etc.)
- Experience working with various types of builders
- Experience working with various types of organizations

Commitment and Flexibility

- Commitment to attend a LEED for Homes Provider training in February 2010

- Ability to participate in quarterly phone calls with USGBC, and to provide bi-weekly e-mail updates to USGBC on problems encountered
- Prominently market LEED for Homes on their website, and marketing materials (per USGBC's communication guidelines)
- Ability to adopt USGBC's data storage and data sharing protocol for LEED for Homes projects, and to provide this information to USGBC on a regular (i.e., monthly) basis
- Ability to assist USGBC in showcasing the LEED for Homes program
- Completeness of information provided

Generally, LEED for Homes Providers are expected to work in concert with USGBC to ensure a positive experience for builder participants and to enable USGBC to make effective use of the participants' experience in the program to further refine the LEED for Homes program. This will require regular consultation with USGBC staff and cooperation in the creation of case studies and marketing materials featuring LEED for Homes projects. These activities will constitute part of the Provider Agreement between USGBC and Providers.

Provider's agreements are non-exclusive in terms of territory, clients or services.

Provider Licensing

USGBC is offering to license the use of the LEED for Homes Rating System and LEED brand (per the USGBC's branding guidelines) to LEED for Homes Providers.

As part of the Provider agreement with USGBC, LEED for Homes Providers must agree to the following upon their selection by USGBC:

- Complete a Provider agreement with USGBC **for the area(s)** in which the Provider agrees to perform LEED for Homes-related verification services.
- Complete a Conflict of Interest Form
- Complete a Code of Ethics Form
- Monitor the fees paid to USGBC for builder participation and project certification, including: project registration and certification fees.
- Establish annual performance goals, in collaboration with USGBC (see "Action Plan" below).
- Have a senior team member trained as a LEED for Homes Provider - Quality Assurance Designee (or QAD)**Error! Bookmark not defined.**, and work with USGBC staff to complete the approval of the all LEED for Homes projects.

Action Plan

After selection as a LEED for Homes Provider, each organization will be expected to work with USGBC to develop an annual action plan with the primary goal being to establish sufficient infrastructure, marketing effort and business planning to deliver a significant LEED for Homes market share in their designated target market(s) in the next 12 months. Goals for LEED for Homes registered projects will be based on market strength and market projections but typically be no less than 200-300 registrations with

stronger markets requiring more. Each Provider's Strategic Plan must include information about the projected number of registered LEED Homes and registered builders in 2009, as well as the names of the green raters that will be trained to verify these homes.

USGBC will compile the annual plans from each Provider into a national USGBC plan. USGBC will adjust regional estimates, based on USGBC's best estimates of market potential for LEED for Homes.

USGBC will host phone calls with each Provider on a quarterly basis to review their performance to date. This meeting will include a review of the unique needs of the local market, and any additional support that may be needed from USGBC.

Per USGBC's discretion, additional Providers may be selected in any market that is underperforming. USGBC will only do so after conducting a fair review and evaluation process with the existing Provider(s).

Application Procedures

Please complete the attached ten-page submittal form. You may also submit up to 5 pages of additional supporting info (e.g., resumes, continuous learning plans, descriptions of related experience, etc...). **As part of this application process, USGBC staff may request to meet with applicants at their offices for an in person interview.**

Please e-mail (preferred) or fax your completed application along with resumes for team members and two references **no later than Monday, November 30th, 2009** to:

LEED for Homes Provider RFQ

Fax: 202-828-5110

Email: provider@usgbc.org

USGBC will confirm receipt of your application, if you do not receive confirmation please contact us at the information above.

For further information about the LEED for Homes Program visit the USGBC website:

www.usgbc.org/Homes