

Request for Proposal

Physical Needs Assessment & Energy Audit

September 25, 2025

The Housing Authority of the City of Augusta, Georgia (hereafter referred to as PHA) is soliciting written a request for proposals (RFPs) from qualified firms to perform a Physical Needs Assessment (PNA) and Energy Audit (EA) of the Housing Authority of the City of Augusta, Georgia's entire public housing stock as outlined in the RFP and provide services in accordance with HUD protocol.

Proposals must be received no later than 4:00 PM EST on Monday, October 27, 2025. Proposals should be clearly marked "Physical Needs Assessment & Energy Audit Proposal" and addressed to Dr. Gregory A. Francisco, Director of Planning and Development, Augusta Housing Authority, 1435 Walton Way, Augusta, GA 30901.

Incomplete proposals or proposals that do not conform to the requirements specified herein will not be considered. Issuance of the RFP does not oblige PHA to award a contract, nor is the PHA liable for any costs incurred by the proposer in the preparation and submittal of proposals for the subject work. The PHA retains the right to award all or parts of this contract to several proposers, to not select any proposers, and/or to re-solicit proposals. The act of submitting a proposal is a declaration that the proposer has read the RFP and understands all the requirements and conditions.

Questions concerning this RFP must be submitted via email to Dr. Gregory A. Francisco, gfrancisco@augustapha.org (706) 312-3165 no later than Thursday, **October 16, 2025**. The questions and answers will be responded to no later than Thursday, **October 23, 2025** and e-mailed to each firm that provides an email address when they receive the RFP. However, if the contractor should indicate at the time of the question as to whether any content is proprietary and should not be publicly posted. The PHA will make the sole determination as to any proprietary content and whether the answer will be provided to all firms via e-mail.

The Housing Authority of The City of Augusta

BY: Jacob L. Oglesby, Executive Director

Table of Contents

- A. Invitation
- B. Description of the Agency
- C. Proposer Information
- D. Scope of Services
- E. Property Description
- F. Proposal Requirements
- G. References
- H. Cost of Services
- I. Additional Information
- J. Selection Process
- K. Evaluation Factors
- L. Delivery of Services
- M. Insurance
- N. Schedule
- O. Payment

A. INVITATION

The Housing Authority of the City of Augusta, Georgia (AHA) with its primary address at 1435 Walton Way, Augusta, Georgia 30901 is seeking the services of a consulting firm to provide services in developing a Physical Needs Assessment (PNA) and Energy Audit of the Housing Authority of the City of Augusta, Georgia's housing stock using the Department of Housing and Urban Development's (HUD) required criteria/protocol.

Proposals must be received no later than 4:00 PM EST on Monday, October 27, 2025.

Proposals should be clearly marked "Physical Needs Assessment & Energy Audit Proposal" and addressed to Dr. Gregory A. Francisco, Director of Planning and Development, Augusta Housing Authority, 1435 Walton Way, Augusta, Georgia 30901.

B. DESCRIPTION OF THE AGENCY

The Housing Authority of the City of Augusta is a government agency (public body both corporate and politic) as defined by the Georgia General Assembly in 1937. The Housing Authority of the City of Augusta is a Government Authority established December 13, 1937 and like other Housing Authorities across the nation - is an Independent Corporation authorized by enabling Federal Legislation and created in accordance with the Housing Authorities Law of the State of Georgia. It operates under the direct supervision of the U.S. Department of Housing and Urban Development. The Agency consists of 1,599 public housing units. The developments that will be part of this PNA and Energy Audit assessment are outlined in SECTION E.

C. PROPOSER INFORMATION

1. Address Mailing and Physical)
2. Contact Person
3. Telephone Numbers to Fax and Cell if applicable
4. E-mail address
5. Website address

D. SCOPE OF SERVICES

The purpose of this solicitation is to select a qualified firm to perform a Physical Needs Assessment (PNA) & Energy Audit. The selected contractor will provide the full range of services required for conducting the HUD PNA and EA including evaluating the existing conditions of the housing stock including a random selection of units, common areas, offices, site improvements, and program areas.

All identified physical improvements will meet or exceed the HUD mandatory standards, and those established by local health, safety, and building codes.

At a minimum, the goal of the PNA and EA is to identify and provide a description of all physical improvements that will be required to bring the property back to a level comparable with "as built", to the degree reasonably possible based on available components and building age. The effort should provide the Agency with the information necessary to ensure long-term physical viability and in a

manner suitable for planning and budgeting purposes. Data shall be in a format suitable for HUD reporting requirements.

Physical Needs Assessment (PNA)

The new HUD PNA format will much more closely resemble Physical Needs Assessments generally in use in the real estate industry and in that regard is neither unique nor anticipated to require specialized skills beyond those that Physical Needs Assessment providers typically possess.

The PNA will collect information for standard component replacement/refurbishment and records immediate needs as well as the needs distributed over a 20-year term, expressed in terms of dollars required to meet the needs.

The requested PNA will include the customary elements of a physical needs assessment performed to generally accepted industry standards as well as the specific HUD requirements outlined by HUD.

1. Follow the requirements and guidelines established by HUD which describe the required approach to PNAs.
2. Perform interviews as needed with knowledgeable people as to the existing documents, plans, building histories, maintenance records, NSPIRE scores, etc. of each property.
3. Data collection and review to include at least any previously performed Physical Needs Assessment provided by the PHA, previously performed energy audits, appropriate energy conservation or other green data, relevant regulatory actions, project drawings as available, system testing reports (i.e.: fire alarms, sprinklers, elevators etc.), utility usage patterns, repair and replacement history, and preventative maintenance plans.
4. Identify all development components that will be part of the assessment.
5. Establish a sampling methodology for units that will include 10% of all units per property. The sample should also include at least 1 of each unit sizes in each building type. Units must be distributed so that a variety of conditions will be evaluated (top floor units, corner units, areas where weather occurs, etc.). Section 504 units will be included so that they are also represented equitably in the sampling methodology including locations and bedroom sizes.
6. Establish a methodology that will sample common lobby areas and corridors.
7. Establish a plan to inspect 100% of site, all systems, paving and grading, building exteriors/envelopes, finishes, program areas, offices, basements, utilities, laundry facilities, mechanical areas, sprinklers, emergency systems, security, crawl spaces, etc. Please note if individual units have individual HVAC, basements, etc., then these will be part of the 10% sample, except in cases where there may be atypical components which should be assessed individually. All administrative, maintenance, childcare building, Boys/Girls Club, Youth Sports Center, management office buildings, maintenance office buildings, warehouses and community buildings are to be inspected.
8. As part of the assessment, each individual component will receive an estimate of Expected Useful Life (EUL).
9. As part of the assessment, each individual component will be provided with a placement cost on an individual component and for a total of those components. (Ex: per window and per window times all similar windows)
10. Each area that is designated as part of Section 504 or American with Disabilities Act (ADA) requirements will be inspected to assure the components are functioning per their purpose. Note a

regulatory compliance review is not required for these units or areas, just functionality and EUL assessment.

11. The PNA will record the incremental cost (the difference in cost for an energy efficient or green component as compared to the cost of a standard component already included in the component replacement schedule) to implement cost effective Energy Conservation Measures recommended from an energy audit or other green measures. (See Energy Audit Description and Scope below). Cost effective is where the Energy Conservation Measure will pay for itself in savings over the useful life of the improvement.
12. The PNA will record Marketability/Livability improvements identified by PHA which are components that do not currently exist and those that add functionality to the PHAs physical plant. For example, the PHA may wish to improve marketability by combining efficiency units to create more desirable one-bedroom units, or the PHA might wish to add surveillance cameras.
13. Upon completion of the inspections, a report will be provided to the PHA in narrative and spreadsheet forms that meets HUD and PHA requirements and will be in both paper and electronic format per HUD requirements. The electronic format will be compatible with and capable of being uploaded to the HUD PNA required protocol. This should include populating a database that will facilitate the upload of this information in accordance with the HUD PNA protocol, and a description of any software or data base programs which will be provided by the vendor to the PHA in order to increase the accessibility and usefulness of the PNA results in guiding the PHA's ongoing operations. The selected firm must assist the PHA in training to successfully upload the PNA to HUD. However, the firm has primary responsibility for uploading all required data.
14. The assessment is of observable components and destructive testing is not anticipated and would only occur with prior PHA approval.
15. Any deficiencies that are identified and which could have an impact on health and safety will be brought to the attention of the PHA immediately.
16. Review of findings with PHA and approval of the PNA by PHA.
17. Uploading the results and required data into HUD's PNA required protocol .

Energy Audit (EA)

The purpose of the (EA) is to analyze measured utility consumption, to identify and evaluate conservation measures that could result in cost effective energy and water conservation, and to evaluate green measures that could result in environmental benefits. It is not an investment grade energy audit but should provide sufficient data and guidance to indicate to PHA whether a more comprehensive audit would be useful in determining the potential for greater savings on certain Energy Conservation Measures (ECM).

The Energy Audit shall meet all the requirements of HUD's Physical Needs Assessment and contain at least the following elements in order to integrate energy conservation information into the PNA:

1. A review of property/ building data including prior energy audits.
2. An assessment of the existing property physical components affecting energy consumption.
3. Analysis of fuel, electricity, and water bills and usage for at least the PHA held accounts for trend analysis and industry benchmarks.
4. An assessment of building operations, maintenance, and resident education as it relates to energy conservation principles.
5. Categorization of recommended Energy Conservation Measures (ECM) into improvements with payback periods of 12 years or less, greater than 12 and less than or equal to 20 years, and more than 20 years.

6. Projected cost of ECMs, and where a standard (less energy efficient) building component is available, the projected cost of the standard component and the incremental cost of the ECM.
7. Projected annual savings in water consumption.
8. Projected annual energy consumption savings in the appropriate energy unit of measurement (i.e.: kilowatt-hours, BTU, gallons, cubic feet etc.) for recommended ECMs.
9. Projected annual savings in dollars for recommended ECMs.
10. Expected useful life of all ECMs and green measures.
11. Identify life cycle costs or savings of all ECMs and green measures including disposal costs and maintenance costs.
12. Energy auditor recommendations for optimal sequencing of ECM implementation for maximum benefit.
13. Identification and evaluation of all Energy Conservation Measures (ECM) considered which shall include those that have the potential for cost effective implementation. Energy Conservation Measures that shall be considered in the energy audit include those in the following categories:
 - a. Building equipment operation and maintenance (i.e.: repair of plumbing leaks, timely air filter replacements).
 - b. Building envelope (e.g., wall or attic insulation, roofs, storm doors, weatherization, and windows).
 - c. Mechanical equipment and controls (e.g., energy efficient furnaces, air handlers, fans, boilers, hot water heaters, and programmable thermostats).
 - d. Water conservation (e.g., low flow fixtures, alternate irrigation, and grey water).
 - e. Power, lighting systems and controls (e.g., CFL lighting, photocell controls, and motion controls).
 - f. Appliances (e.g., energy star).
 - g. Identification of more advanced Energy Conservation Measures which have the potential of cost-effective implementation upon further evaluation by the PHA. These include those in the following categories: Fuel conversions; Advanced energy savings technologies (e.g., green construction techniques, cogeneration, and Xeriscaping); and Energy generating technologies and renewable energy systems (e.g., solar, geothermal, and cogeneration).
14. Uploading the results and required data by way of HUD's PNA required protocol or other tool if applicable.

Staff Training and Support

A detailed outline of how the vendor will train PHA staff, including the specific skills they will be taught which will enable them to update the tool(s) if needed (at least annually) and put the data to effective use in the operation of the PHA. In addition, describe how the vendor will provide any ongoing support to the PHA staff when they conduct and upload annual PNA updates to HUD.

E. PROPERTY DESCRIPTION

The Housing Authority owns 1,599 units of conventional public housing at 12 AMPS.

<u>Project Name/Number/Address</u>	<u>Non-Dwelling Structures</u>	<u>Units</u>	<u>Dwelling Structures</u>
Olmsted Homes, GA001000010 2141 B Street Augusta, GA 30904	4	255	72
Oak Pointe Apartments, GA001000050 730 East Boundary Augusta, GA 30901	1	250	125
Dogwood Terrace Boys & Girls Club/ Gym 2101 15th Ave. Augusta, GA 30901	1	0	0
Peabody Apartments, GA001000071 1425 Walton Way Augusta, GA 30901	0	228	1
Ervin Towers, GA001000072 1365 Laney Walker Blvd. Augusta, GA 30901	0	99	1
Allen Homes, GA001000080 526 Hines Street Augusta, GA 30901	1	150	38
Hal Powell Apartments, GA001000090 2244 Broad Street Augusta, GA 30904	0	99	1
Jennings Place, GA001000100 1690 Olive Road Augusta, GA 30904	1	150	25
M. M. Scott Apartments, GA001000120 825 Spruce Street Augusta, GA 30901	0	100	40
Barton Village, GA001000140 3619 London Blvd. Augusta, GA 30906	3	152	154
Overlook Apartments, GA001000160 2325 Overlook Road Augusta, GA 30906	1	76	24
Powell Pointe, GA0010000121 101 Twiggs Circle Augusta, GA 30901	0	40	24

TOTALS: Non-Dwelling Structures: 12

Number of Units: 1,599

Number of Structures: 505

	# BEDROOMS	0	1	2	3	4	5	TOTAL
GA1-1	Olmsted Homes	0	87	110	55	3	0	255
GA1-5	Oak Pointe	0	40	120	64	20	6	250
GA1-6	Dogwood B & G Club/Gym	0	0	0	0	0	0	0
GA1-71	Peabody Apts	46	169	13	0	0	0	228
GA1-72	Ervin Towers	26	68	5	0	0	0	99
GA1-8	Allen Homes	0	34	55	45	10	6	150
GA1-9	Hal Powell Apts	6	90	3	0	0	0	99
GA1-10	Jennings Place	0	22	44	60	16	8	150
GA1-12	M.M. Scott Complex	0	31	40	24	4	1	100
GA1-14	Barton Village	0	0	0	121	31	0	152
GA1-16	Overlook Apts	0	27	36	12	1	0	76
GA1-20	Powell Pointe	0	32	8	0	0	0	40
TOTALS		78	600	434	381	85	21	1,599

F. PROPOSAL REQUIREMENTS

In response to this Proposal, provide the following:

1. DESCRIPTION OF COMPANY HISTORY
2. QUALIFICATIONS

Explanation of why the company is the best qualified to fulfil the contract by responding to the following:

- a. Provide evidence of your firm's ability to provide the PNA and energy audit as required by HUD, indicated by the profiles of the principals and staff's professional and technical competence and experience with similar projects. This should include documentation that the person conducting the Physical Needs Assessment has at least five years of experience with inspections of building systems including systems, roofs, structural components, living spaces, plumbing, electrical, HVAC, building envelope, emergency systems, elevators, community and program spaces, offices, and grounds and other amenities.
- b. Describe knowledge of applicable local and state building codes and Federal building alteration requirements.
- c. Describe knowledge of public housing operations, maintenance and capital need requirements.
- d. Describe knowledge of Section 504 and American with Disabilities Act.
- e. Describe experience with cost estimating and description of cost estimating database and software that will be used to provide cost estimates that comply with HUD's PNA required protocol.
- f. Describe knowledge and understanding of Lead-Based Paint Interim Guidelines and Hazard Identification and LBP and asbestos testing and abatement.
- g. Describe format of PNA report, compatibility with HUD PNA required protocol, ease of ongoing update and usefulness of report in PHA planning.
- h. Describe experience in training PHA staff and estimate of time required to train staff.

3. STAFFING

Provide the following:

The level of staff to be assigned to this project and their knowledge and experience in developing PNAs and energy audits including specific reference to the qualifications included HUD's Physical Needs Assessment Tool. Additionally, provide documentation demonstrating that identified staff has direct maintenance and planning related experience by providing the profiles of the principals and staff's professional and technical competence and experience with similar projects.

4. OTHER INFORMATION

Provide any other information that may further document firm's capabilities.

G. REFERENCES

Provide a list of at least three (3) references documenting the company's direct experience in developing PNAs and energy audits. The references must include contact information for projects completed over the last two years, or currently in process. Individuals identified as references will be assured of anonymity to the fullest degree possible under the Freedom of Information Act.

H. COST OF SERVICES

The cost of services to perform the PNA will be provided in the response to this RFP must be a firm fixed price. No additional work can be completed until the PHA, and firm agrees to any additional cost in advance and documented in writing.

I. ADDITIONAL INFORMATION

The PHAs retains the right to request any additional information pertaining to the company's ability, qualifications, and procedures used to accomplish all work under the contract as it deems necessary to ensure safe and satisfactory work.

J. SELECTION PROCESS

1. PHA will assign an Evaluation Committee to complete an evaluation of all proposals.
2. Proposals will be evaluated using the Evaluation Factors outlined in K. EVALUATION FACTORS. The Evaluation Committee will make a recommendation to the Executive Director. The results of the evaluation will not be disclosed, either before or after a contract is awarded.
3. The Executive Director will select the proposal that is determined to be in the best interest of Housing Authority of the City of Augusta, Georgia and present it to the Board of Commissioners for approval.

K. EVALUATION FACTORS

Factor No.	Evaluation Factor	Max Points
1	Quality of firm's description of "Scope of Services" NOTE: Section D will be used to evaluate this factor	5
2	Evidence of your firm's ability to provide a PNA and energy audit as required by HUD, indicated by the profiles of the principals and staff's professional and technical competence and experience with similar projects. NOTE: Section F 1, 2 a, and F 3 will be used to evaluate this factor:	5
3	Demonstrated knowledge of local and state building codes and Federal building alterations requirements – NOTE: F 2 b will be used to verify that firm has this knowledge.	5
4	Knowledge of public housing operations, maintenance and capital need requirements. NOTE: F 2 c will be used to evaluate this factor.	5
5	Knowledge of Section 504 of the Rehabilitation Act of 1973. NOTE: F 2 d will be used to verify this evaluation factor.	5
6	Describe experience with cost estimating and description of cost estimating software that will be used to provide cost estimates that comply with HUD's PNA required protocol. NOTE: F 2 e will be used to evaluate this factor.	5
7	Knowledge and understanding of Lead-Based Paint Interim Guidelines and Hazard Identification and LBP and asbestos testing and abatement. NOTE: F 2 f will be used to evaluate this factor.	5

8	Format of PNA report, compatibility with HUD PNA required protocol, ease of ongoing update, ease and usefulness of report in PHA planning. Note: F 2 g will be used to verify this rating factor	5
9	Experience in training PHA staff and estimate of time required to train staff – Note: F 2 h will be used to verify to evaluate this factor	5
10	Capability to provide professional services in a timely manner evidenced by past projects and timelines indicating capacity to deliver the product in the time specified. NOTE: Section L – Delivery of Services will be used to grade this factor. Section G References will be used to verify that firm meets established time lines.	5
11	Other Information – NOTE: Section F 4 Other Information will be used to evaluate this factor.	5
12	Price – Firm fixed price, reference Section H – Cost of Services	45
	Total Possible Points	100

NOTE: Ten (10) points will be deducted from the total score from any firm that does not list their response for rating the RFP in the format listed in the “K Evaluation Factors “above (1-12).

L. DELIVERY OF SERVICES

Once a selection is made, the selected contractor will provide a schedule of major tasks and timeline for completion. At a minimum the timeline must comply with Section N Schedule (below) starting with the date Agreement/Contract signed with PHA and including uploading PNA to HUD.

M. INSURANCE

Evidence of insurance including General Liability Insurance and Professional Liability Insurance (Errors and Omissions) of at least \$1,000,000 per coverage must be provided before execution of contract.

N. SCHEDULE

Task	Timelines
Advertise	September 25, 2025
Questions due	October 16, 2025
Submittals due	4:00 PM, EST October 27, 2025
Firm Selected and Notified	November 3 , 2025

Agreement/Contract Signed	November 7, 2025
Commence site visits, unit inspections	NLT December 1, 2025
Complete data entry by way of HUD PNA required protocol, PHA review and Uploading of Data to HUD system	February 28, 2026
Complete PNA narrative and presentation to PHA	March 31, 2026

O. PAYMENT

Payment for services will be made upon receipt of invoice and after the service has been provided. The invoice must be fully itemized and provide sufficient information for approving payment and for auditing purposes. Invoices must be accompanied by receipt for services in order for payment to be processed. Invoices shall refer to the contract number and project title and shall be mailed to the Accounting Manager. Payment by PHA will be made to the vendor within 30 days of receipt of a correct and complete invoice.