



Proposal For:

# Physical Needs Assessment and Energy Audit

Prepared by:

**AEI Consultants**

Chad Matthews

20 Gibson Place, Suite 310

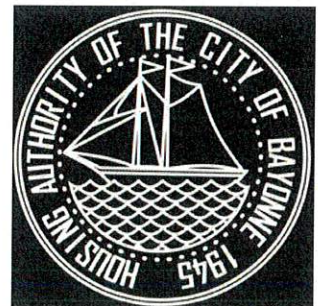
Freehold, NJ 07728

804.389.2641

[cmatthews@aeiconsultants.com](mailto:cmatthews@aeiconsultants.com)

March 1, 2024

Prepared for:



Housing Authority of the City of Bayonne

Mr. John T. Mahon

Bayonne, NJ 07002





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# **TAB 1.0**

## Letter of Transmittal

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**AEI Consultants**  
20 Gibson Place, Suite 310  
Freehold, NJ 07728

March 1, 2024

**John T. Mahon**  
Housing Authority of the City of Bayonne  
50 East 21st Street  
Bayonne, NJ 07002

**Subject: Physical Needs Assessments and Energy Audit**

Dear Mr. John T. Mahon,

All Environmental, Inc. ("AEI Consultants") is pleased to provide the Housing Authority of the City of Bayonne with the attached Statement of Qualifications to provide Physical Needs Assessments and Energy Audit. AEI has assembled a team of experts in diverse disciplines to provide the Housing Authority of the City of Bayonne with the knowledge and expertise necessary to address its comprehensive project related needs.

AEI recognizes that the Housing Authority of the City of Bayonne needs a partner with expert technical abilities, local knowledge, and experience working with public housing authorities. AEI has a history of successful projects with each of these criteria and can advance the Housing Authority of the City of Bayonne's vision for the future. AEI takes no exceptions to the RFP requirements, contractual terms, or conditions.

Chad Matthews, Government Contracts Administrator and Jeb Bonnett, Senior Vice President - HUD Building Assessments at AEI Consultants, will be the Housing Authority of the City of Bayonne Point of Contact and Project Executive for this solicitation. Their contact information can be found below. We appreciate the opportunity to submit our qualifications to the Housing Authority of the City of Bayonne.

Sincerely,

Jeb Bonnett  
Senior Vice President - HUD Building Assessments  
804.955.8373  
jbonnett@aeiconsultants.com

Chad Matthews  
Government Contracts Administrator  
804.389.2641  
cmatthews@aeiconsultants.com

# TAB 2.0

## Experience



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# EXPERIENCE

## 2.1 Summary of Experience:

AEI has a solid understanding and substantial experience in completing the HUD Scope RAD Physical Needs Assessments, Energy Audits, Section 18 Demolition & Disposition Reports, HUD Scope Construction Architectural & Cost Analysis as well as the completion of Construction Inspections for approval of funds related to construction loans.

AEI is a national leader in consulting for Public Housing Authorities and HUD. Some highlights of AEI's experience which directly relates to the requirements of the RFP are discussed below:

- Completed over 500 CNA Etools since becoming a requirement for HUD insured lenders (November 2017) and Public Housing Authorities (February 2018).
- Completed over 700 Physical Needs Assessments (PNAs) s for Public Housing Authorities since 2014.
- Completed over 1200 HUD Scope PNAs for various clients over the past 10 years.
- Recently performed over a dozen HUD scope Demolition & Disposition Reports for apartment communities operated by Public Housing Authorities.
- Completed over 900 Level II ASHRAE Energy Audits over the past 5 years.
- Completed over 50 HUD Scope Architectural & Cost Analysis Reports for Federal Housing Administration (FHA) insured construction loans. Furthermore, AEI's Construction Consulting Team has prepared well over 250 A&E Cost analysis reports over the past decade for FHA insured lenders.
- Completed Construction Inspections on over 1,500 projects to determine the value of work in place and approve funding associated with construction loans.

In addition to the above referenced construction, physical needs and energy consulting experience, AEI and our team of professional employees have substantial environmental consulting experience in the following areas:

- |                                      |   |
|--------------------------------------|---|
| • Asbestos Surveys                   | • Mold Surveys                                |
| • LBP Surveys & Risk Assessments     | • Hazardous Materials Abatement               |
| • Phase I ESAs                       | • HUD Scope Environmental Assessments         |
| • Phase II ESAs                      | • Cultural Resources Surveys                  |
| • CEQRA Analysis                     | • Biological & Endangered Species Assessments |
| • Part 50 & 58 Environmental Reviews |   |

## 2.2 New Jersey Public Housing Authority Experience

AEI has worked with 22 Public Housing Authorities in New Jersey. AEI completed RAD Property Condition Assessments and Energy Audits for Atlantic City Housing Authority on a portfolio of 12 communities. RAD Property Condition Assessments and Energy Audits for Paterson Housing Authority on a portfolio of 8 communities. Phase 1 Environmental Site Assessments and Asbestos Screenings on a portfolio of 8 communities for North Little Rock Housing Authority. AEI also completed HUD GPNAs and Energy Audits on a portfolio of 2 communities for Springdale Housing Authority. AEI has also worked with 18 other housing authorities throughout New Jersey.

## 2.3 Recently Completed Projects

AEI has prepared over 200 “PNAs & Energy Audits” for Housing Authorities within the past 5 years and as a result, AEI is very well situated to successfully complete all tasks associated with this RFP. Much of this work was prepared for local governments, municipalities, developers, owners, lending institutions and public housing authorities.

All services were completed within the client’s proposed timeline as requested in their RFP. We stand behind our moto, “On Time, High Quality, with No Surprises.” AEI has provided numerous PNA’s Energy Audits within the past few years for the following references:

Energy Audit & RAD Physical Needs Assessments Experience	
Project Information	Project Information
<b>Wilmington, DE Portfolio</b> Client: Wilmington Housing Authority Scope or Work: ASTM 2018-15 & HUD RAD Guidelines, and HUD Special Application Center PIH Notice 2021-07 Date: Completed April 2022 and January 2023	AEI has been awarded a contract for 2 Level II ASHRAE Energy Audits, RAD PNAs, and CNA Etool PNA with Obsolescence Assessments on 2-communities consisting of 367-units. WHA would like to convert their entire HA to RAD. We are negotiating a potential contract of 8-communities and 1770-units.
<b>Cuyahoga, OH Portfolio</b> Client: Cuyahoga Metropolitan Housing Authority Project: 9-Property Portfolio, Cleveland, OH Scope or Work: ASTM & HUD RAD Guidelines, NESHAP/AHERA Guidelines Date: Completed June 2022 and June 2023	AEI was awarded a contract to assist the Cuyahoga Metropolitan Housing Authority with their due-diligence requirements in advance of their Rental Assistance Demonstration (RAD) transaction with the US Dept. of HUD using Project -Based Voucher Housing Assistance. The improvements consisted of a portfolio of 9 developments which included 690 units.
<b>Boston, MA Portfolio</b> Client: Boston Housing Authority Scope or Work: ASTM 2018-15 & HUD RAD Guidelines, and HUD Special Application Center PIH Notice 2021-07 Date: Completed October 2022 to July 2023	AEI has been awarded Level II ASHRAE Energy Audits, RAD PNA, and CNA Etool contract on 21 -communities containing 187-buildings and 4,391-units.
<b>Reno, NV Portfolio</b> Client: Housing Authority of the City of Reno Scope or Work: ASTM 2018-15 & HUD RAD Guidelines, and HUD Special Application Center PIH Notice 2021-07 Date: Completed July 2022	AEI has been awarded a Level II ASHRAE Energy Audits, RAD PNA, and CNA Etool contract on 8-developments containing 11-buildings and 758-units. AEI is also completing a HUD Scope Demolition & Disposition Report on a 344-unit Hawk View Apartments, tom Sawyer Village, and Mineral Manor communities.
<b>New York City Housing Authority (NYCHA) Portfolio</b> Client: Hudson Companies & Boulevard Together Developer, LLC Scope or Work: ASTM & HUD RAD Guidelines, NESHAP/AHERA Guidelines Date: Completed July 2020; May 2022; and August 2023	AEI was awarded the due-diligence consulting services for a NYCHA RAD transaction on an 18 building, 1,440-unit public housing authority community in Brooklyn, NY. The contract was awarded on April 28, 2020, and was continue through May 2022. Services that AEI is providing include a Phase I ESA, HUD Part 58 Environmental Review, NYC City Environmental Quality Review (CEQR) Survey, HUD Scope Indoor Noise Assessment, New York State Environmental Quality (SEQR) Assessment, RAD Physical Needs Assessment, Level II ASHRAE Energy Audit.



Energy Audit & RAD Physical Needs Assessments Experience	
Project Information	Project Information
<b>Tarrytown, NY Portfolio</b> Client: Tarrytown Housing Authority Scope or Work: ASTM & HUD RAD Guidelines Date: Completed October 2020 and March 2021	AEI completed a Level II ASHRAE Energy Audits, RAD CNAs, and CNA Etools on an apartment tower containing 81 units. AEI is also completing a HUD Scope Demolition & Disposition Report on a 70-unit garden apartment community which is expected to be completed early May 2020.
<b>Cincinnati, OH Portfolio</b> Client: Cincinnati Metropolitan Housing Authority Scope or Work: ASTM 2018-08 & HUD RAD Guidelines & HUD MAP Guidelines Date: Completed January 2020 with March 2020 Addendum	AEI completed a RAD CNA & Level II ASHRAE Energy Audits for the (CMHA). Two (2) CNA ETools were completed, 1 for each complex. To date, AEI has completed 2 RAD assessments on 2 communities, with 273 units. also completed a Green Physical Needs Assessment and Energy Audit on the CMHA's office complex. AEI is currently working on two HUD MAP Scope Architectural Engineering Cost (AEC) reports for Red Mortgage Capital and CMHA for two developments in advance of FHA insured mortgage financing. AEI also completed Phase I ESA, Radon and Asbestos surveys as well as HUD Par 50 Environmental Reviews.
<b>Rochester, NY Portfolio</b> Client: Rochester Housing Authority Scope or Work: ASTM & HUD RAD Guidelines Date: Completed April 2019	AEI completed RAD CNAs, CNA Etools & Level II ASHRAE Energy Audits on a portfolio of 2 properties which had a total of 49 units. AEI also completed HUD scope PNAs on a scattered site portfolio of 7 single family dwellings.
<b>Glen Falls, NY Portfolio</b> Client: Wilder Balter Partners (RAD Developer) and Glens Falls Housing Authority Scope or Work: ASTM & HUD RAD Guidelines Date: Completed December 2019	AEI completed Level II ASHRAE Energy Audits, RAD CNAs, CNA Etools, Engineered Utility Analysis Surveys, Phase I ESAs, Asbestos demolition/renovation surveys, and HUD Part 58 Environmental Reviews on a portfolio of 4 communities comprising of 789 units. RAD CNAs were prepared on 3 of the assets. AEI also prepared a Phase II Sub-Surface investigation on 2 of the assets.
<b>Pawtucket, RI Portfolio</b> Client: Pawtucket Housing Authority Scope or Work: ASTM & HUD RAD Guidelines Date: Completed October 2019	AEI completed Level II ASHRAE Energy Audits, RAD CNAs, CNA Etools, Engineered Utility Analysis Surveys, Phase I ESAs, and HUD Part 58 Environmental Reviews on a portfolio of 5 communities comprising of 785 units.
<b>Paterson, NJ Portfolio</b> Client: Paterson Housing Authority Scope or Work: ASTM & HUD RAD Guidelines Date: Completed December 2019	AEI completed Level II ASHRAE Energy Audits, RAD CNAs, and CNA Etools on a portfolio of 9 communities comprising 712 units.
<b>Los Angeles, CA Portfolio</b> Client: Housing Auth. of the City of LA (HACLA) Scope or Work: ASTM & HUD RAD Guidelines Date: Completed June 2019	AEI completed Level II ASHRAE Energy Audits, RAD CNAs, and CNA Etools on a portfolio of 4 communities which comprise 485 Units. Seismic Risk Assessments were also completed as part of this project.
<b>Williamstown &amp; Deptford, NJ Portfolio</b> Client: Housing Authority of Gloucester County Scope or Work: ASTM & HUD RAD Guidelines Date: Completed June 2019	AEI completed Level II ASHRAE Energy Audits, RAD CNAs, and CNA Etools on a portfolio of 2 high-rise apartment buildings comprising of 200 units. All work is scheduled to be completed over 90-day period.
<b>Cape May, NJ Portfolio</b> Client: Cape May City Housing Authority Scope or Work: ASTM & HUD RAD Guidelines Date: Completed in March 2019	AEI completed a RAD PCA, CNA Etool and Level II ASHRAE Energy Audit on a portfolio of 3 communities comprising of 86 units. One report was completed for all the communities. All work was completed over a 45-day period.



### Energy Audit & RAD Physical Needs Assessments Experience

Project Information	Project Information
<b>Ocean City, NJ Portfolio</b> Client: Ocean City Housing Authority Scope or Work: ASTM & HUD RAD Guidelines Date: Completed December 2018	AEI completed Level II ASHRAE Energy Audits, RAD CNAs, and CNA Etools on a portfolio of 2 communities comprising of 103 units. All work was completed over the 60-day period.
<b>Salt Lake City, UT Portfolio</b> Client: Housing Authority of the City of Salt Lake Scope or Work: ASTM & HUD RAD Guidelines Date: Completed January 2019	AEI completed Level II ASHRAE Energy Audits, RAD CNAs, and CNA Etools on a portfolio of 4 communities comprising of 389 units. All work was completed over a 90-day period.
<b>Vineland, NJ Portfolio</b> Client: Vineland Housing Authority Scope or Work: ASTM & HUD RAD Guidelines Date: Completed September 2018	AEI completed Level II ASHRAE Energy Audits, RAD CNAs, and CNA Etools on 2 high rise towers comprising of 203 units. All work was completed over the 60-day period.
<b>Ruth L. Bennett Homes, Chester, PA</b> Client: Chester Housing Authority Scope or Work: ASTM & HUD RAD Guidelines Date: Completed February 2019	AEI completed a Level II ASHRAE Energy Audits, RAD CNAs, CNA Etools, and a HUD Scope Demolition & Disposition report on a 33-building, 261-unit community that was originally constructed in 1942.
<b>McAllen, TX Portfolio</b> Client: Boonton Housing Authority Scope or Work: ASTM & HUD RAD Guidelines Date: Completed June 2019	AEI completed Level II ASHRAE Energy Audits, RAD CNAs, CNA Etools and Integrated Pest Management Inspections on a portfolio of 3 communities comprising a total of 251-units. All work was completed over the 60-day period. All work was completed over a 75 to 90-day time period.
<b>Portland, ME Portfolio</b> Client: Portland Housing Authority Scope or Work: ASTM & HUD RAD Guidelines Date: Completed April 2019	AEI completed Level II ASHRAE Energy Audits, RAD CNAs, CNA Etools, Phase I ESAs and HUD Part 58 Environmental Reviews on a portfolio of 7 communities comprising of 797 units. AEI continues to provide technical support to the client in advance of their RAD application submittal to HUD. AEI also completed HUD Scope Demolition & Disposition Reports on several communities.
<b>Salt Lake County, UT Portfolio</b> Client: Housing Authority of the County of Salt Lake (aka Housing Connect) Scope or Work: ASTM & HUD RAD Guidelines Date: Completed June 2019 m- July 2019	AEI completed Level II ASHRAE Energy Audits, RAD CNAs, CNA Etools, Phase I ESAs and HUD Part 58 Environmental Reviews on a portfolio of 10 communities comprising of 485 units.
<b>Williamstown &amp; Deptford, NJ Portfolio</b> Client: Housing Authority of Gloucester County Scope or Work: ASTM & HUD RAD Guidelines Date: Completed June 2019	AEI completed Level II ASHRAE Energy Audits, RAD CNAs, and CNA Etools on a portfolio of 2 high-rise apartment buildings comprising of 200 units. All work is scheduled to be completed over 90-day period.
<b>Anne Arundel County, MD Portfolio</b> Client: Housing Commission of Anne Arundel County Scope or Work: ASTM 2018-15 & HUD RAD Guidelines Date: Last Work Completed in April 2019	AEI completed 5 RAD CNAs and 5 CNA ETools, on 5 communities with over 350 units. These RAD CNAs and CNA Etools were updates to RAD scope PCA reports completed for the client in 2016. AEI utilized AEI's previously prepared energy audits and construction rehab budgets to complete the Etools.

# TAB 3.0

## Staffing

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# STAFFING

AEI is known for our dependability and responsiveness. From the initial consultation to the final reports, our reliable staff takes ownership of each project including set-up, research, field work, billing, and client communication, resulting in accurate, concise, and well-organized reporting and assessments. AEI is proud of our 30-year track record of providing assessment and consulting services to the commercial real estate community. We have combined our steady growth with consistent financial performance allowing us to continue to grow our office locations across the US. AEI currently employees 400 full-time staff.

## Key Personnel

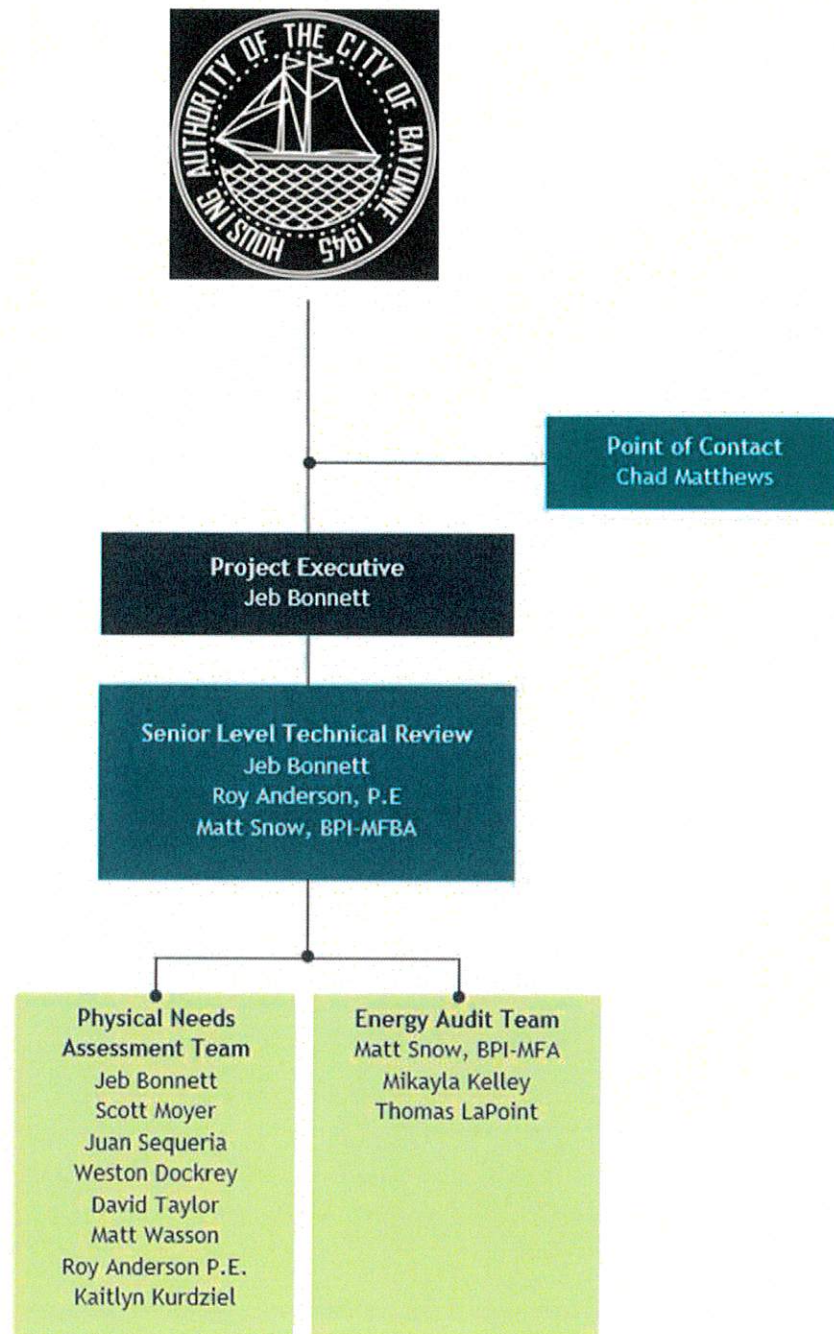
AEI Consultants has assembled an experienced and diverse team of experts for work with Housing Authority of the City of Bayonne. Chad Matthews, will be the project point-of-contact. Jeb Bonnett will be the Project Director. Please see below for a table of key personnel, roles, and qualifications.

Key Personnel	Role	Certifications
<b>AEI Consultants Staff</b>		
<b>Jeb Bonnett</b>	Project Executive and Physical Conditions and Needs Project Director 20 years of Experience	B.B.A - Finance Principles of Real Estate Program HUD Multi-Family Accelerated Processing (MAP) Cost/A&E Seminar HUD Multi-Family Accelerated Processing (MAP) PCNA Workshop Virginia Housing Development Authority - Universal Design Fair Housing Act Accessibility Training Course- Phillip Zook Fair Housing Act Accessibility Training Seminar Elevator Training Courses Building Performance Institute - Training Services Building Specs Training Institute, Building/Design Inspection
<b>Chad Matthews</b>	Procurement Manager Point of Contact 7 years of Experience	B.S. Business Administration and Management
<b>Matt Snow</b>	Energy and Sustainability Services Project Director 16 years of Experience	B.S.B.A. Business BPI - MFBA - Multifamily Building Analyst Professional, Building Performance Institute
<b>Roy Anderson PE</b>	Seismic Services Manager and Professional Engineer 39 years of Experience	BS Structural Engineering Professional Engineer, California, Civil 82059 American Society of Civil Engineers (ASCE) Structural Engineers Association of Northern California (SEAONC) Earthquake Engineering Research Institute (EERI)
<b>David Taylor</b>	National Client Manager - HUD 15 years of Experience	International Code Council Certified Building Inspector International Code Council Certified Commercial and Residential Building Inspector

		International Code Council Certified Accessibility Inspector / Plan Examiner Commonwealth of Virginia Certified Commercial Building Inspector Commonwealth of Virginia Certified Residential Building Inspector Integrated Pest Management in Multifamily Housing International Code Council Accessibility & Usability for Residential Buildings(Training) Integrated Pest Management in Multifamily Housing Course - National HealthyHomes Training Center Property Maintenance Inspection, Electrical Inspection & Understanding Braced Walls Training by Virginia Building Code Academy Building Performance Institute (BPI) Certified Multifamily Building Analyst Professional Elevator Training Courses
<b>Matt Wasson</b>	National Client Manager - Building 18 years of Experience	BS - Bachelor of Science, Civil and Environmental Engineering
<b>Weston Dockery</b>	Senior Project Manager 15 years of Experience	BS of Architecture
<b>Scott Moyer</b>	Construction Cost Estimator HUD Cost Analyst 25 years of Experience	BS, Civil and Building Design Engineering HUD MAP Certified
<b>Juan Sequeira</b>	Project Manager Capital Needs and Conditions 13 years of Experience	Bachelor of Architecture
<b>Thomas LaPoint</b>	National Client Manager, Senior Technical Reviewer of Energy Services 10 years of Experience	M.S. Environmental Management and Sustainability BA - Liberal Arts and Engineering Studies, Environmental Studies Minor LEED Accredited Professional - Operations + Maintenance Building Performance Institute - Multifamily Building Analyst Certified Green Point Rater - Build It Green Certified Energy Manager - Association of Energy Engineers
<b>Mikayla Kelley</b>	Project Manager of Energy Audits, Energy Benchmarking, and Energy Star 6 years of Experience	B.S. Integrated Science and Technology BPI-MFBA - Building Performance Institute, Multifamily Building Analyst Professional



**Flow Chart:**



**SEE RESUMES OF OUR TEAM IN EXHIBITS**

# TAB 4.0

## Evaluation Criteria



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# EVALUATION CRITERIA

Below is a discussion of how AEI meets and exceeds the evaluation criteria for completing all the requirements of Physical Needs Assessments and Energy Audits:

## 4.1 Experience:

AEI has also completed over 2,000 HUD Scope Physical Needs Assessments (PNAs) and over 1,100 Energy Audits for various clients over the past 10 years and over 700 PNAs for Public Housing Authorities since 2014. AEI is an industry leader in the HUD due-diligence consulting world for Public Housing Authorities, municipalities, and HUD insured lenders.

## 4.2 Qualifications:

AEI has very experienced engineers, cost estimators, and energy auditors on staff to complete this assessment. Furthermore, AEI's project manager; a leading expert in the industry, Jeb Bonnet has over 25 years of experience and Matt Snow has 17 years of experience, they both have a strong understanding of this project. AEI's project team also has substantial experience in preparing reports with the exact same scope of work which is required by Housing Authority of the City of Bayonne

## 4.3 Approach/Work Plan

### HUD Physical Needs Assessment & ASTM E2018-15

The general purpose of this HUD Physical Needs Assessment Report is to assist our client in understanding the condition of the property by providing recommendations for the expected capital repair and replacement costs that the property may reasonably encounter during the projection period covered by this report. Assessments and recommendations are based upon a review of readily available public and private documents pertaining to the property, interviews with knowledgeable people associated with the property, as well as walk-thru survey of the readily accessible site improvements and buildings. The assessment is intended to identify and describe the building and site systems, to assess the overall condition of the systems compared to industry standards, to identify conspicuous deficiencies, and to project a reasonable estimate of life-cycle costs and remaining useful life for site and building systems.

AEI also understands that this Physical Needs Assessment Report may be intended to assist the client in the process of completing a loan approval for the subject property. Factors that may affect our recommendations include the availability of historical records, the consistency and disclosure of the management's maintenance practices, and the availability of reliable disclosure of property conditions. The property survey and related report is intended to assist our client in the evaluation of the physical aspects of the subject property and how its condition may affect the soundness of their financial decisions over time.

No assessment can wholly eliminate the uncertainty regarding the presence of physical deficiencies and performance of the building systems. According to the ASTM guidelines, a Physical Needs Assessment is intended to reduce the risk regarding potential building system and component failure. The ASTM standard recognizes the inherent subjective nature of the assessment regarding such issues as workmanship, quality of care during installation, maintenance of building systems and remaining useful of the building system. Assessments, analysis, and opinions expressed within this report are not representations regarding either the design integrity or the structural soundness of the property or components.

**PNA FIELD INSPECTION:** After a comprehensive review of plans, prior reports and energy consumption data, AEI will conduct a field inspection of the buildings and grounds of each property. AEI will also tailor the field

inspection based upon the document reviews conducted prior to the site visits. At a minimum, the following areas will be surveyed:

- All Buildings will be surveyed (roofs, mechanical areas, common areas, cellars, basements, exteriors).
- All Site areas (100%) will be surveyed including the exterior of the scattered sites.
- 25% Unit inspections will be completed (Communities and Scattered Sites)
- Representative unit interiors (25%) will be inspected for the Scattered site portfolios.
- Representative building exteriors will be surveyed.
- Representative building mechanical rooms will be surveyed.
- A representative sampling of building interior areas will be surveyed. Emphasis will be placed on those units which are more susceptible to damage such as corner units, top floor units, etc.
- All Assets will be inventoried and the condition of same will be assessed as part of the PNA.
- Particular attention to the Americans with Accessibility Act will be paid to common areas, the leasing office and all areas of public accommodation. Field measurements will be taken.
- An inventory of various building systems and equipment, it's effective age and condition will be taken during the field inspections. This information will be transposed to the various report sections: (Narrative Write-Up, Photo Documentation & Excel Cost and Reserve Tables)
- Costs associated with fire & life safety issues, deferred maintenance and a long-term capital reserve extending out to 20 years (per HUD Guidelines)

## **LEVEL II ASHRAE ENERGY AUDIT & INSPECTION**

The scope of work for this energy audit is intended to meet the industry best practice for the assessment of a building's energy performance including the baseline annual energy and water use and cost calculations as well as the projected upper and lower range of energy and water use and cost considering the impact of the primary independent variables (historical weather, occupancy, and operating hours). Additionally, the scope of work includes industry best practice performance benchmarking of the subject property's energy key performance indicators to its relevant peer groups at the national to local market level and the identification of green building performance attributes that may add financial asset value. Finally, the energy audit report concludes with specific recommended energy and water conservation and cost savings measures that meet the client's energy efficiency investment criteria.

AEI will perform the following tasks to complete each Level II ASHRAE Energy Audit:

- A detailed building survey, including energy and water consumption and peak demand analysis.
- Interviews with knowledgeable persons (i.e. owners, property managers, tenants)
- Obtain and review information related to energy and water use at the property (must be provided from client, owner, operator, or key site manager)
- Identify and provide the savings and cost analyses of all practical efficiency measures (EEMs or ECMs) that meet the Owner's/Operator's constraints and economic criteria, along with proposed changes to operation and maintenance (O&M) procedures.
- Analyze records related to energy consumption and water usage for comparison to comparable properties nationwide utilizing Energy Star Portfolio Manager.
- If the Property Owner is unwilling or unable to provide building energy and water use and cost information, the energy audit cannot be performed accurately.
- Report includes photographs, graphs, and discussion of following topics relative to the site.
- Energy Performance and CO2 emitted annually (Carbon Footprint)
- The results of the Energy Audit may indicate that potential energy savings may be realized by upgrading components and building systems.



Each housing community will have a Level II Energy Audit (EA) prepared. The EA will also be included in the PCA as an appendix. Results and a discussion of potential energy savings and energy conservation measures will be included in the PNA narrative.

#### ADA, SECTION 504 & UFAS INSPECTIONS

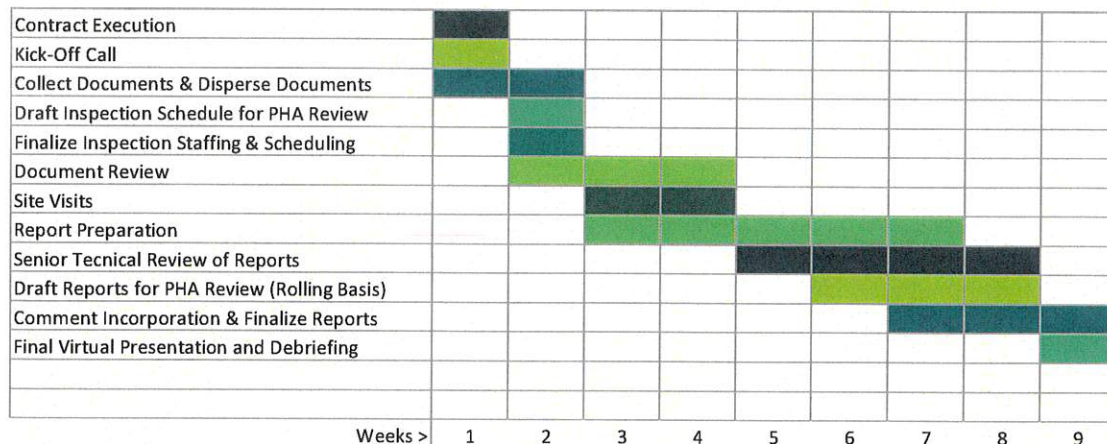
AEI's field inspection team will review any previous ADA/UFAS Assessments (if any). From this review, AEI will develop checklists for each community to determine if those improvements have been made. AEI will also complete a full ADA review of the properties and public accommodations and take field measurements during that time. AEI's field team will also take measurements in each complex's Accessible units for UFAS and Section 504 accessibility requirements. This inspection will also include a plan review and field verification for engineering constraints (CMU Bearing Walls, plumbing and electrical lines, etc.) which may prohibit obtaining full compliance. A representative sampling (determined by AEI's field team) of the Accessible units will be completed. AEI's team will be providing quality control and final technical review for this portion of the project. Cost estimates and recommendations will be included in the narrative PNA reports.

#### DATA ANALYSIS & REPORTING

After the field inspections have been completed, AEI will compare field data to information gathered from our documentation and plan review. This will be completed by all the disciplines working on the project; Physical Needs, Energy Auditor & ADA/UFA review. The following deliverables will be provided.

- Physical Needs Assessment Report (including UFAS & ADA Audit)
- 20 Year Capital Reserve Schedule for Critical & Non-Critical Repairs
- Cost Estimates associated with future physical needs, energy conservation, ADA & UFAS upgrades)

## Timeline



# TAB 5.0

## Pricing

## Appendix 2: Cost Proposal

The contractor shall propose a firm fixed fee for all work performed under this RFP. The fee will be broken down to reflect the fee for the PNA, Energy Audit, and total fee as reflected herein. The fee breakdown shall be inclusive of all costs, including but not limited to labor, material, supplies, and other costs. The fee shall be broken down by the component parts as follows:

### PART A

PNA.  
Energy Audit.

Total Cost. \$72,440  
Total Cost. \$54,265

Grand Total.

Total Cost. \$126,705

**Firm/Company Name:** All Environmental Inc. (dba AEI Consultants)

**Firm's Authorized Representative:** Chad Matthews

**Signature:**

*Chad Matthews*



**PARK B -PNA COST PROPOSAL**

A. Labor: A breakdown for each position and for all positions combined.

Position	Hourly Rate	Estimated Hours	Total
National Client Coordinator	\$110	11	\$1,210
Project Manager	\$140	54	\$7,560
Project Manager	\$140	225	\$31,500
Senior Project Manager	\$175	68	\$11,900
Director	\$100	22	\$6,270

B. Direct Cost. Direct costs are that which can be identified specifically with a project and there for are charged to that project.

Cost Element	Total
Materials	\$0
Travel	\$2,000
Misc Expenses	\$0
Total Direct Costs	\$2,000

C. Indirect Costs, if applicable. Indirect Costs are costs that are incurred for common or joint objectives and therefore cannot be readily and specifically identified with a particular direct project or activity.

Cost Element	Total
Labor	\$0
Non-Labor	\$12,000
Total Indirect Costs	\$12,000

D. Subtotal. Subtotal of all labor direct and indirect costs.

<b>Subtotal Total Labor, Direct and Indirect Cost</b>	<b>\$72,440</b>
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E. General, Administrative and Overhead. State the percentage and total costs.

Cost Element	Total
General	
Administrative	
Overhead	
Total	\$26,911.50

F. Profit. State the percentage and total cost

Percentage	37%	Total	\$26,802.8
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G. Total PNA Cost Proposal

<b>Total PNA Cost</b>	<b>\$72,440</b>
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#### PARK C -ENERGY AUDIT COST PROPOSAL

A. Labor: A breakdown for each position and for all positions combined.

Position	Hourly Rate	Estimated Hours	Total
National Client Coordinator	\$110	5	\$550
Project Manager	\$140	54	\$7,560
Project Manager	\$140	200	\$28,000
Senior Project Manager	\$150	22	\$3,300
Director	\$285	3	\$855

- B. Direct Cost. Direct costs are that which can be identified specifically with a project and there for are charged to that project.

Cost Element	Total
Materials	\$0
Travel	\$2,000
Misc Expenses	\$0
Total Direct Costs	\$0

- C. Indirect Costs, if applicable. Indirect Costs are costs that are incurred for common or joint objectives and therefore cannot be readily and specifically identified with a particular direct project or activity.

Cost Element	Total
Labor	\$0
Non-Labor	\$12,000
Total Indirect Costs	\$0

- D. Subtotal. Subtotal of all labor direct and indirect costs.

<b>Subtotal Total Labor, Direct and Indirect Cost</b>	<b>\$54,265</b>
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- E. General, Administrative and Overhead. State the percentage and total costs.

Cost Element	Total
General	
Administrative	
Overhead	
Total	\$17,543



F. Profit. State the percentage and total cost

Percentage	32%	Total	\$17,364.8
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G. Total Energy Audit Cost Proposal

<i>Total Energy Audit Cost</i>	<b>\$54,265</b>
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# TAB 6.0

## Additional Documents

# ADDITIONAL DOCUMENTS

6.1 Resumes

6.2 Sample Report



## Exhibit 6.1 Resumes



## **Jeb Bonnett**

### **Director of Building Assessments - HUD**

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#### **EDUCATION**

- B.B.A - Finance, James Madison University
- Principles of Real Estate Program, James Madison University

#### **CERTIFICATIONS**

- HUD Multi-Family Accelerated Processing (MAP) Cost/A&E Seminar - New York City
- HUD Multi-Family Accelerated Processing (MAP) PCNA Workshop - Columbus
- Virginia Housing Development Authority - Universal Design Training
- Fair Housing Act Accessibility Training Course- Phillip Zook
- Fair Housing Act Accessibility Training Seminar- Fair Housing Act First
- Elevator Training Courses - Sanjay Kamani, QEI, KP Property Advisors LLC
- Building Performance Institute - Training Services
- Building Specs Training Institute, Building/Design Inspection Courses

#### **SUMMARY OF PROFESSIONAL EXPERIENCE**

Mr. Bonnett has worked exclusively in the niche HUD real estate due diligence consulting industry since 2005. He has performed and directed thousands of building assessment projects for HUD MAP, HUD LEAN, and Public Housing Authority clients. He has expert knowledge of HUD's Capital Needs Assessment guidelines and software reporting requirements. In addition, he has extensive experience and training on numerous accessibility standards, including, UFAS, ADA, ANSI, and the Fair Housing Act Guidelines.

As Director of Building Assessments - HUD, Mr. Bonnett is responsible for providing direction for the development of HUD Building Assessment services throughout AEI. Day to day responsibilities include, creating organizational process assets, training internal and external stakeholders, identifying and understanding industry guidelines for HUD Building Assessment services, senior reviewing, project oversight, business development and client management.

#### **PROJECT EXPERIENCE**

Project experience for Mr. Bonnett includes:

- Performing and directing the successful completion of over 3,000 HUD MAP and HUD LEAN compliant Capital Needs Assessments.
- Performing and directing the successful completion of RAD and GPNA projects for over 100 HUD Public Housing Authority AMPs.
- Leading the creation of software reporting platforms to efficiently populate HUD's CNA E-Tool, RAD Tool, and GPNA Tool software systems.
- More than 5 years' experience in multifamily assessments including numerous assignments for Freddie Mac, Fannie Mae and HUD execution.
- Creating and performing HUD E-Tool training seminars for HUD MAP lenders and internal staff.





## Scott Moyer

### Construction Cost Estimator/HUD Cost Analyst

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#### EDUCATION

- BS, Civil and Building Design Engineering - Old Dominion University

#### CERTIFICATIONS

- HUD MAP Certified

#### SUMMARY OF PROFESSIONAL EXPERIENCE

Mr. Moyer brings over 20 years' experience and has extensive experience as a Senior Estimator/Cost Analyst working with General Contractors primarily in the multi-family, commercial and industrial construction.

As a Construction Cost Estimator and a Senior HUD Cost Analyst, Mr. Moyers responsibilities consist of developing Independent Cost Estimates for project economic cost comparison analysis and risk identification, then authoring Conceptual Budget Reviews (CBR), Construction Risk Analysis (CRA), and Cost to Complete (CTC) reports for the Construction Risk Management (CRM) division of AEI Consultants. Responsible for coordination, planning, and oversight efforts for assigned FHA Cost Reviews in accordance with directives as set forth in the HUD MAP Guide. Duties include review of project documents for completeness and coordination, and to determine discrepancies or conflicts in the documents which may lead to adverse cost impacts to the project, advising the MAP Team members in proper resolution of issues and HUD MAP cost reporting procedures, and final approval to FHA of proposed project costs submitted by the project General Contractor. Cost Review involves a fully independent project cost estimate to be developed for comparison analysis, schedules to be reviewed for adequate duration and monthly draw amounts, addendum letters for updates to projects at firm application, and any required resolution of HUD/FHA review produced comments.

All produced cost review estimates assembled into an in-house database for future work cost approvals. Non-HUD roles taken on involved production of Cost to Complete Reports, Insurable Replacement Valuations, and cross-training for Construction Loan Monitoring (CLM). Additional responsibilities include cost reviews for HUD financed projects utilizing either the FHA 223(f), 221(d)(4) or 232 Lean Loan Program.

## PROJECT EXPERIENCE

Project experience for Mr. Moyer includes:

- Cedar Grove Portfolio - 4 -property multifamily dwelling with 1,125 unit for veterans. Mr. Moyer developed an Independent Cost Estimate, for this project economic cost comparison analysis and risk identification, then authorized Conceptual Budget Review.
- Frontenac, MO - Is a Hospitality building with 253 rooms. Mr. Moyer prepared a Conceptual Budget Review on this property. Costing was based on R.S. Means building construction cost data and R.S. Means Square Foot Cost Reports along with internal data to provide a cost comparison of the proposed budget with typical industry costs.

A list of HUD compliant cost estimating project Mr. Moyer completed are summarized below:

### **HUD MAP 221 (d)(4) Multifamily New Construction (NC) & Sub-Rehabilitation (SR) Program**

- The Station at Gardner Mill, West Jordan City, Utah
- Cedar Court Apts. and Site Ren, Norwalk, Ct.
- Meadow Cliff Apartments, Oklahoma City, Oklahoma
- Walker Court North & South, Jonesboro, Arkansas
- Cameron Creek Apartments, Tempe., Arizona
- Elevate as Southwest Station, Eden Prairie, MN
- The Elliot, Little Rock, Arkansas
- The Commodore Place Apartments, Cleveland, Ohio
- River Run Apartments, North Bend, Washington
- RAD Lofts, Asheville, NC
- Midlothian Town Center Apartments, Midlothian, Virginia
- Gateway at Carolina Forest, Myrtle Beach, SC
- Midtown Pointe, Royal Oak, Michigan
- Lakehouse Commons,
- Buffalo Sunset Apartments, Las Vegas, NV
- Gateway at Carolina Forest, Myrtle Beach, SC
- Dwell @ 2<sup>nd</sup>, Philadelphia, PA
- Brennan Point Apartments, Newport News, VA

### **HUD MAP 232 Lean, Healthcare, Assisted Living, and Skilled Nursing Facilities**

- The Guilford House, Guilford, Connecticut
- Congress Oaks, Palm Springs, Florida
- Abbington Crossing of Wilson, Wilson, North Carolina
- Grand View Place, Grand Rapids, Michigan
- The Highland Club, Baton Rouge, Louisiana
- The Park at Sydney Drive, Birmingham, Alabama
- Hinds County Nursing and Rehabilitation Center, Byram, Mississippi
- Brandermill Assisted Living, Chesterfield, Virginia

- Jasper Senior Living, Jasper, Indiana
- Nevins Nursing and Rehab Center, Methuen, MA
- Parkhaven Retirement & Assisted Living, Manhattan, Montana

**HUD MAP 223 Heavy-f, Multifamily Refinance with Heavy Renovation**

- Pecan Place
- Euclid Hills Villa





# Juan C. Sequeira

## Project Manager

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### EDUCATION

- Bachelor of Architecture - American University, 2008
- Minor in Finance - American University, 2010

### SUMMARY OF PROFESSIONAL EXPERIENCE

Mr. Sequeira has more than 11 years of experience in the architectural design and inspection as project management of residential and hospitality projects domestic and abroad. He has performed building and property assessments for varying scopes and customer requirements for the commercial real estate, banking and insurance industries.

Currently, Mr. Sequeira is responsible for performing Property Condition Assessments that include identifying deficiencies, providing overall professional judgment of a property's condition and preparing cost estimates for repairs and projected replacement costs. He performs Property Condition Assessments of varying property types including retail, office, commercial, hospitality, industrial, multi-family, and senior living facilities throughout the United States.

Prior to joining AEI Consultants, Mr. Sequeira has worked on construction documents, schematic design, design development and project management for many different types of architecture fields including: Corporate, Commercial, Mixed-Use, Retail, Hospitality, and Residential. In addition, these assessments included formulating replacement costs, assessing property and liability risks and providing recommendations.

### PROJECT EXPERIENCE

Project experience for Mr. Sequeira includes:

- Numerous multifamily assignments in accordance with Fannie Mae, Freddie Mac, and HUD requirements.
- Multi-Family - Tesora Apartments, Las Vegas, NV; 223(f) Refi-Acq and E-Tool.
- Multi-Family - Cherrydale Apartments, Baltimore, MD; 223(f) Refi-Acq and E-Tool.
- Multi-Family - Arella Forest at Woodland, Conroe, TX; 223(f) Refi-Acq and E-Tool.
- Multi-Family - Forrest Brook Apartments, York, SC; 223(f) Refi-Acq and E-Tool.
- Multi-Family - Lincoln Village Apartments, Lincoln, OR; 223(f) Refi-Acq and E-Tool.
- Multi-Family - Park Manor Apartments, Lebanon, OR; 223(f) Refi-Acq and E-Tool.

- Multi-Family - Willamalane Apartments, Milwaukee, OR; 223(f) Refi-Acq and E-Tool.
- Multi-Family - Pine Tree Apartments, Winston, OR; 223(f) Refi-Acq and E-Tool.
- Multi-Family - Parkside Village, Roseburg, OR; 223(f) Refi-Acq and E-Tool.
- Multi-Family - Primrose of Shadow Creek, Austin, TX; 223(f) Refi-Acq and E-Tool.
- Multi-Family - Ridge at Trinity, Dallas, TX; 223(f) Refi-Acq and E-Tool.
- Multi-Family - Friendship Haven Healthcare Center, Friendswood, TX; 223(f) Refi-Acq and E-Tool.
- Multi-Family - Heritage Square Fort Worth, Fort Worth, TX; 223(f) Refi-Acq and E-Tool.
- In depth experience with multifamily assessments that conform to all GSE (Fannie Mae & Freddie Mac) and HUD requirements for multifamily property condition assessments
- Multi-Family - Greenbriar Mansion, Fort Worth, TX; 223(f) Refi-Acq and E-Tool.
- Multi-Family - Regency Garden Apartments, Bryan, TX; 223(f) Refi-Acq and E-Tool.
- Multi-Family - The Duke Apartments, Victoria, TX; 223(f) Refi-Acq and E-Tool.
- Multi-Family - Castlewood Apartments, Houston, TX; 223(f) Refi-Acq and E-Tool.



# William David Taylor

## National Client Manager, HUD

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### EDUCATION

- J. Sargent Reynolds Community College - Courses in Architectural Design

### CERTIFICATIONS

- International Code Council Certified Building Inspector
- International Code Council Certified Commercial Building Inspector
- International Code Council Certified Residential Building Inspector
- International Code Council Certified Accessibility Inspector / Plan Examiner
- Commonwealth of Virginia Certified Commercial Building Inspector
- Commonwealth of Virginia Certified Residential Building Inspector
- Integrated Pest Management in Multifamily Housing (Training)
- International Code Council Accessibility & Usability for Residential Buildings (Training)
- Integrated Pest Management in Multifamily Housing Course - National Healthy Homes Training Center
- Property Maintenance Inspection, Electrical Inspection & Understanding Braced Walls Training by Virginia
- Building Code Academy
- Building Performance Institute (BPI) Certified Multifamily Building Analyst Professional
- Basics of Elevator Inspections given by Sanjay Kamani, QEI, KP Property Advisors LLC VHDA Universal Design Course

### SUMMARY OF PROFESSIONAL EXPERIENCE

Mr. Taylor has extensive experience with regards to commercial and residential construction, design, and inspection issues. Mr. Taylor has greater than fifteen (15) years' experience in the construction field. He was in the Building Inspections for the City of Richmond and did construction design for Virginia based construction and engineering firms. During his former employment he was responsible for design, review, and inspection for code compliance on multiple projects throughout the Commonwealth of Virginia. Mr. Taylor has attended specialized building classes and has in depth understanding regarding building construction and inspection. He has performed and multiple building assessment projects for HUD MAP, HUD LEAN, and Public Housing Authority clients. He is knowledgeable of HUD's Capital Needs Assessment guidelines and software. In addition, he has extensive experience and training on numerous accessibility standards, including, UFAS, ADA, ANSI, and the Fair Housing Act Guidelines.



As a National Client Manager - HUD, Mr. Taylor is responsible for conducting and managing Project Capital Needs Assessments, communicating with lenders, communicating with HUD, and training Project Managers.

## **PROJECT EXPERIENCE**

Project experience for Mr. Taylor includes:

- Performing RAD Physical Condition Assessments at more than 50 Public Housing Authorities.
- More than 5 years' experience in multifamily assessments including numerous assignments for Freddie Mac, HUD, and Fannie Mae execution.
- Performing over 200 HUD MAP 223(f) assessments.
- Performing HUD Map 202 assessments in multiple states.
- Performing over 100 HUD LEAN assessments.
- Performing HUD MAP 223(a)(7) assessments.
- Performing Tax Credit assessments in multiple states.
- Performing HUD (SPRAC), HUD OAHP, Standard and Poor, ASTM, and Freddie Mac assessments.



## **Matthew E. Wasson**

### **National Client Manager, Building Sciences & Engineering**

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#### **EDUCATION**

- BS - Bachelors of Science, Civil and Environmental Engineering, University of Cincinnati

#### **SUMMARY OF PROFESSIONAL EXPERIENCE**

Mr. Wasson has in excess of 18 years of experience with engineering and environmental assessments. He has performed hundreds of site surveys and directed thousands of due diligence assessments for HUD clients, Federal and State Agencies, Higher Learning clientele, Faith-based organizations Capital Market entities, and Equity Investors.

Mr. Wasson is knowledgeable with ASTM Standard Guide for Property Condition Assessments and Phase I Environmental Site Assessments, Fannie Mae and Freddie Mac protocols, HUD's Multifamily Accelerated Processing Guide, accessibility standards including UFAS, FHAA, ADA, and Section 504

#### **SUMMARY OF PROJECT EXPERIENCE**

Mr. Wasson's due diligence consulting includes:

- Assessments of over 800 properties in 48 states
- Environmental reconnaissance of over 300 properties
- Experience in managing large portfolios of various building types
- Extensive experience with assessing existing healthcare, assisted living, retail, office, industrial, multifamily residential, state and federal buildings

Mr. Wasson's experience includes expertise in building systems and supervision of other professionals including:

- Program development and implementation to comply with the General Services Administration Building Engineering Report program evaluating 40 facilities and over 15 million square feet utilizing architectural, engineering, and specialty service personnel
- Directing teams of specialized engineers/architects on evaluations for multiple municipal agencies in the development of reserve analysis and budgeting
- Project lead on multiple public housing authority entities managing collection of data, review of technical reports, and managing client expectations
- Providing training and supervision for evaluation of multiple property types including accessibility requirements
- Training clientele on HUD MAP requirements and the evolution of the program
- Management and training of teams comprised of 60 engineers, architects, and specialty service personnel tasked on multiple projects.



# Roy Anderson

PE - Seismic Services Manager, Building Assessments

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## EDUCATION

- University of California, San Diego; BS Structural Engineering 1990

## CERTIFICATIONS

- Professional Engineer, California, Civil 82059
- California Licensed General Contractor, B641049, Inactive
- ATC First Responder Training, California OES Volunteer
- Redwood Empire Remodelers Association, Board Member, Past President
- Appointed to the City of Santa Rosa Board of Building Regulations Appeals, Chairman
- Committee Member ASTM WK55885 Seismic Risk Assessment of Real Estate Portfolios
- American Society of Civil Engineers (ASCE)
- Structural Engineers Association of Northern California (SEAONC)
- Earthquake Engineering Research Institute (EERI)

## SUMMARY OF PROFESSIONAL EXPERIENCE

Mr. Anderson has over 39 years of construction, construction management, structural design, seismic retrofit, structural assessment, and commercial due diligence experience. He owned and operated a successful structural design consulting firm for over 14 years.

His project experience includes public infrastructure, public works, and private developments including both residential and commercial projects. He has acted as a regional manager for a national consulting services firm overseeing property and casualty and seismic risk assessment operations in the western states, performing over 2000 Seismic Risk Assessment (Probable Maximum Loss) assessments and reports in the seismically active United States, Europe, and Mexico, over 100 Property Condition Assessments, and over 400 Property Damage Assessments for the insurance industry in 38 states. He has investigated and assessed damage in the 2014 Napa 6.0, Virginia 5.8, Oklahoma 5.7, and Northridge 6.7 earthquakes.

Mr. Anderson currently oversees and manages the Seismic Services Division of AEI's Building Assessments Department. Responsibilities include Senior Assessment of Seismic Risk Assessment Reports, Conducting Peer Reviews, scheduling, Seismic Retrofit Design, interfacing with Clients, providing outreach and education to Clients and Building Owners.

Some of his specific areas of expertise include forensic analysis of architectural and structural damage, seismic assessments of buildings, structural remediation and



rehabilitation of properties (URM, Historic, seismic, tornado, hurricane, flood, and fire), and structural design of swimming pools, wood and timber framed structures, structural steel structures, reinforced concrete structures, reinforced masonry structures, and pre-manufactured light gage steel structures.

## **PROJECT EXPERIENCE**

Project experience for Mr. Anderson includes:

- Structural Design since 1991
- Seismic Retrofit Design since 1991
- Seismic Risk Assessments since 1994
- Forensic Assessments since 2007

Publications: 2016 ASTM Seismic Standards Update, California Mortgage Finance News, Fall 2016.



# Henry J. Michalak

## Project Manager - Housing and Urban Development

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### EDUCATION

- J. Sargent Reynolds Community College, AAS in Architectural Drafting/Design and Construction Management

### CERTIFICATIONS

- Building Performance Institute (BPI) Certified Multifamily Building Analyst Professional (BPI-MFBA)
- Basics of Elevator Inspections given by Sanjay Kamani, QEI, KP Property Advisors LLC  
VHDA Universal Design Course

### SUMMARY OF PROFESSIONAL EXPERIENCE

Mr. Michalak has over thirty years' experience with commercial and residential design and construction. Mr. Michalak's experience ranges from office functions that include estimating, AIA billing, to hands on construction, to managing in-field construction, to owning his own Class A Construction Company. During his former employment with a third-party due diligence firm, he started as a Project Manager/Inspector performing building assessments on Elderly Care/Assisted Living/Memory Care facilities as well as multiple building projects for HUD MAP, HUD LEAN, and Public Housing Authority clients. He progressed to the role of Revision/Associate Account Manager, working directly with Clients. He is knowledgeable with HUD's Capital Needs Assessment guidelines and software. In addition, he has extensive experience and training on numerous accessibility standards, including, UFAS, ADA, ANSI, and the Fair Housing Act Guidelines.

### PROJECT EXPERIENCE

Project experience for Mr. Michalak includes:

- More than 6 years' experience in HUD multifamily assessments.
- Performing RAD Physical Condition Assessments for Public Housing Authority's.
- Performing over 50 HUD MAP 223(f) assessments.
- Performing HUD Map 202 assessments in multiple states.
- Performing over 30 HUD LEAN assessments.
- Performing multiple ASTM assessments.
- Cost estimation for SAC demolition/disposition, new construction and sub-rehabilitation projects.



# Kaitlyn Kurdziel

## Project Manager

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### EDUCATION

- BA, Bachelor of Arts, Sociology and Anthropology, Bucknell University, Lewisburg, Pennsylvania, 2019

### CERTIFICATIONS

- Fair Housing Act Accessibility Training Seminar- Fair Housing Act First
- International Code Council Certified Accessibility Inspector/Plans Examiner

### SUMMARY OF PROFESSIONAL EXPERIENCE

Ms. Kurdziel has been working as a project manager for AEI Consultants HUD group. She has performed building assessment projects for HUD MAP and Public Housing Authority clients. In addition to her project management experience, Ms. Kurdziel has experience in accessibility matters through her time working for a Richmond based non-profit, RampsRVA. At RampsRVA, she built over 20 wheelchair ramps, performed on-site repairs, and conducted over 30 field assessments.

Currently, Ms. Kurdziel is responsible for conducting project management duties for HUD Architectural, Engineering and Cost Reviews for 221(d)(4), 223(f), 241(a), and 232 LEAN Projects. Additional responsibilities include conducting HUD Capital Needs Assessments which includes identifying deficiencies, providing overall professional judgment of a property's condition, and preparing cost estimates for repairs and projected replacement costs.

### PROJECT EXPERIENCE

Project experience for Ms. Kurdziel includes:

#### HUD Architectural, Engineering and Cost Review Project Management

- The Ryder II (Ankeny South), Portland, OR (241(a) New Construction)
- Lalita Senior Living, Brownsville, TX (221(d)(4) New Construction)
- Allure at Jefferson Phase II, Fredericksburg, VA (221(d)(4) New Construction)
- The Positano, Dallas, TX (221(d)(4) Substantial Rehabilitation)
- Rosemont at Ash Creek, Dallas, TX (221(d)(4) Substantial Rehabilitation)
- Labor Retreat, Minneapolis, MN (221(d)(4) Substantial Rehabilitation)
- Sherman Forbes Housing, St. Paul, MN (221(d)(4) Substantial Rehabilitation)
- Connelly Manor, Sharon, PA (221(d)(4) Substantial Rehabilitation)
- Pickfair Square, Pickerington, OH (223(f) Refinance with Heavy Renovation)
- Salem Manor, Fort Wayne, IN (223(f) Refinance with Heavy Renovation)
- Dock Manor, Landsdale, PA (223(f) Refinance with Heavy Renovation)
- Pine Towers, Phoenix, AZ (223(f) Refinance with Heavy Renovation)
- St Margaret's House, New York, NY (223(f) Refinance with Heavy Renovation)



#### Capital Needs Assessments

- Harbour Manor, Temple Hills, MD, HUD CNA with e-tool
- The Lamont, Washington, DC, HUD CNA with e-tool
- Summer Wind, Summerville, SC, HUD CNA with e-tool
- Cedar Pointe, Blacksburg, VA, HUD CNA with e-tool
- Coliseum Lofts, Richmond, VA, HUD CNA with e-tool
- The Joule, San Antonio, TX, Bridge CNA
- Eckert Heights, San Antonio, Bridge CNA
- Holly Court, Kilbuck, VA, RAD for PRAC
- Wellesley, Newport News, VA, RAD for PRAC
- Villa at Bryn Mawr, Minneapolis, MN, LEAN PCNA



## **Matt Snow, LEED AP, BPI-MFBA**

### **Vice President, HUD Energy and Sustainability Services**

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#### **EDUCATION**

- BSBA - Christopher Newport, Newport News, VA

#### **CERTIFICATIONS**

- BPI - MFBA - Multifamily Building Analyst Professional, Building Performance Institute

#### **SUMMARY OF PROFESSIONAL EXPERIENCE**

Mr. Snow has been involved in the HUD Energy and Sustainability Assessments since 2007. He has been active in conducting ASHRAE Level I and II Energy Audits and technical energy program management and review as well as Energy Star benchmarking and Certification services. Matt has years of experience in HUD energy protocols including M2M, ARRA, GERA and Green MIP projects and has performed hundreds of Energy Audits.

#### **PROJECT EXPERIENCE**

Project experience for Mr. Snow includes:

- Utility system condition assessments consisting of various multifamily and mixed-use properties
- Energy and Water demand and use reduction studies, planning and implementation of conservation measures, as well as measurement & verification of improvements for funds release
- Building systems analyses for complex HVAC, electrical, and plumbing systems in large and small facilities
- Management of energy and condition assessment projects for municipalities, state and federal governments, as well as private entities
- Management of Technical Review teams for condition assessments and energy audits
- Collaborative development of data collection tools and protocols for large programs
- Substantial work in Housing and Urban Development programs in Green Mark-to-Market Assessments, Rental Assistance Demonstration (RAD) projects, Capital Needs Assessments, Physical Needs Assessments, Green Retrofit Physical Needs Assessments, ARRA Green Multifamily assessments, Low Income Housing Tax Credit assessments, and Fannie Mae assessments
- Construction monitoring services



# Thomas LaPoint, M.S.

## National Client Manager, Energy Services

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### EDUCATION

- MS - Environmental Management and Sustainability, St. Edward's University
- BA - Liberal Arts and Engineering Studies, Environmental Studies Minor, Cal Poly - San Luis Obispo

### CERTIFICATIONS

- LEED Accredited Professional - Operations + Maintenance
- Building Performance Institute - Multifamily Building Analyst
- Certified Energy Manager - Association of Energy Engineers
- Certified Green Point Rater - Build It Green

### SUMMARY OF PROFESSIONAL EXPERIENCE

Mr. LaPoint is a national client manager in the energy services industry. His experience includes over 10 years in energy efficiency/sustainability project management and four years in the construction industry.

### PROJECT EXPERIENCE

Project experience for Mr. LaPoint includes:

- 300+ Multifamily Building Energy Efficiency Audits
- Fannie Mae and Freddie Mac Green Up program compliance
- More than 6 years of experience in multifamily assessments including numerous assignments for Freddie Mac, HUD, and Fannie Mae execution
- Energy Star Portfolio Manager Certifications and Benchmarking
- NY Local Law 97 Compliance
- Fannie Mae Solar PV Module
- HUD Utility Allowance Calculations
- Phase I Environmental Site Assessments

Mr. LaPoint has worked in the energy services field since 2013.





## Mikayla Kelley

### Energy Project Manager

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#### EDUCATION

- B.S. Integrated Science and Technology - James Madison University, Harrisonburg, VA

#### CERTIFICATIONS

- BPI-MFBA - Building Performance Institute, Multifamily Building Analyst Professional

#### SUMMARY OF PROFESSIONAL EXPERIENCE

Ms. Kelley has been involved in the HUD Energy and Sustainability industry since 2017. She has experience performing HUD multi-family energy audits, energy benchmarking, and Energy Star Certifications.

#### PROJECT EXPERIENCE

Project experience for Ms. Kelley includes:

Energy Audits - Property analysis with energy calculations and proposed energy measures

- Cambridge Square Apartments, Monroeville, PA
- Parkview Terrace, Pharr, TX
- Wilmington Housing Authority Scattered Sites, Wilmington, DE
- Fulton Village, Houston, TX

Statement of Energy Performance (SEP) - Summary of energy consumption for a property

- Meridian Luxury Apartments, Fresno, CA
- Lakeshore Crossing, Atlanta, GA
- Tribute Creek Apartment Homes, Oakland, MI
- Encore Apartments, Forest Lake, MN

Data Acquisition and Reporting Plans - Description of data collection for a property

- Cedar and Saint Apartments, Mobile, AL
- Central Flats, Superior, WI
- Aery, Hermantown, MN
- Timnath Trail, Timnath, CO

Energy Star Certification - Properties that meet strict energy efficiency criteria set by Energy Star

- Allure at Jefferson, Fredericksburg, VA
- Haven Dell Apartments, Herriman, UT
- Newman Village, Frisco, TX
- Central Flats, Superior, WI