



**CITY OF TACOMA**  
**Environmental Services**

**ADDENDUM NO. ES21-0781F**

**DATE:** February 15, 2021

**REVISIONS TO:**

**Request for Proposals Specification No. ES21-0781F**  
**Tacoma Community Building Decarbonization Strategy**

**NOTICE TO ALL PROPOSERS:**

This addendum is issued to clarify, revise, add to or delete from, the original specification documents for the above project. This addendum, as integrated with the original specification documents, shall form the specification documents. The noted revisions shall take precedence over previously issued specification documents and shall become part of this contract.

**REVISIONS TO THE SUBMITTAL DEADLINE:**

The submittal deadline remains the same.

**REVISIONS TO THE GENERAL INFORMATION AND REQUIREMENTS:**

Replaces Section 3 Summary of Scope of Services and Deliverables in its entirety.

Replaces Section 24 Technical Provisions in its entirety.

**NOTE:** Acknowledge receipt of this addendum by initialing the corresponding space as indicated on the Signature Page. Vendors who have already submitted their bid/proposal may contact the Purchasing Division at 253-502-8468 and request return of their bid/proposal for acknowledgment and re-submittal. Or, a letter acknowledging receipt of this addendum may be submitted in an envelope marked Request for Proposal Specification No. ES21-0781F Addendum No. 1. The City reserves the right to reject any and all bids, including, in certain circumstances, for failure to appropriately acknowledge this addendum.

cc: Beth Jarot, Resilient & Green Building Specialist

### **3. SUMMARY OF SCOPE OF SERVICES AND DELIVERABLES**

The City will be analyzing Impacts and soliciting community input, not conducting an engineering feasibility study. Requested information is not building specific and any retrofit analysis would be conceptual; therefore, we are not seeking services for assuring compliance with specifications or design.

It is the City's intent to select a consultant based on qualifications and abilities of the firm and key project individuals.

The City seeks a consultant team to work with its staff and partners to conduct a comprehensive and innovative Building Decarbonization Strategy that will include:

1. An impact assessment for new commercial and residential development of requiring non-fossil fuel sourced heating, lighting, and power in in Tacoma, and
2. An impact assessment and implementation plan for healthy retrofit solutions for existing residential and commercial building (transitioning from fossil fuel sources to electric).

## 24. TECHNICAL PROVISIONS

### SCOPE OF WORK AND DELIVERABLES

The awarded Respondent (Consultant) shall work with City Staff and the Steering Committee to develop and finalize the Tacoma Building Decarbonization Strategy by **October 1st, 2022**. To assist in completing reports, the Consultant shall work with the Steering Committee to refine the Scope of Work and project timelines, specifying the tasks, responsibilities, schedule, deadlines and deliverables as follows in the following Tasks.

The selected consultant will be responsible for committee coordination and facilitation, project planning, stakeholder engagement coordination, and compilation of the final strategy report to be provided to the City Council. The planning process should not exceed a 12-month period.

Propose a timeline to conduct each of the Tasks referenced below. The timeline should reflect a proposed starting and ending date by Task. For planning purposes, use April 1, 2022 as the initial date for work to begin.

#### **Task 1. Project Management and Steering Committee Facilitation**

The City will convene a steering committee to help review scope, goals, metrics and strategy. Working with city staff, the consultant will:

- Participate in bi-weekly check-in meetings with Resilient & Green Building Specialist and other key staff
- Facilitate the work toward desired objectives through up to 10 meetings
- Develop meeting agendas and materials, facilitate meetings, and take notes
- Guide discussion and manage participation to stay on track and achieve clearly defined objectives
- Conduct interviews or discussions with specific steering committee members, if additional input is required regarding their area/s of expertise
- Provide project updates describing accomplishments, next steps and budget to-date, as well as any schedule, budget or content-related issues
- Provide and present a PowerPoint overview deck (~15 minutes) to two (2) sessions of the City Council.

#### *Task 1 Deliverables:*

- Project work plan and schedule
- Meeting agendas
- Meeting notes
- Interview summaries
- Project updates
- PowerPoint presentations

## **Task 2. Research/Existing Data Review**

The consultant, with guidance from City staff and the steering committee, will carry out targeted research/analysis to develop a framework of core considerations for building decarbonization specific to Tacoma to move the City toward its short-, medium- and long-term climate, housing and public health goals. Interviews may need to be conducted to clarify or gain additional information. Specifically, the consultant will review:

- Current and proposed state legislation
- Building, energy, land development and utility code
- Utility and economic development incentives
- Utility infrastructure studies
- Technical and financial assistance programs
- Retrofit pilot programs
- Equity and housing studies and programs
- Cost-benefit and other case studies
- Public health and housing studies and programs
- Other research and studies identified by consultant, city staff, steering committee and/or community partners

### *Task 2 Deliverables:*

- Summary of research/existing data review, including interviews
- Identification of additional data and information needed for completion of impact assessments and implementation strategy

## **Task 3. New Construction Impact Assessment**

The consultant, with guidance from City staff and the steering committee, will conduct a comprehensive impact assessment of requiring non-fossil fuel sourced heating, lighting, and power in new commercial and residential development in Tacoma. Specifically, the consultant will:

Provide a data review and impact analysis on the opportunities and challenges associated with imposing building electrification requirements for new residential and commercial construction including, but not limited to:

- public health and safety
- economic costs and savings (including inaction or delayed action)
- financing tools
- technical feasibility
- electrical infrastructure capacity and costs
- legal implications
- labor and workforce
- operations
- housing affordability
- equity

### *Task 3 Deliverables:*

- New Construction Impact Assessment Summary, including description of methods and

analytical approach (a conceptual analysis for planning purposes, not an engineering feasibility study)

#### **Task 4. Existing Building/Retrofit Impact Assessment**

The consultant, with guidance from City staff and the steering committee, will conduct a comprehensive impact assessment for healthy existing residential and commercial building retrofit solutions (transitioning from fossil fuel sources to electric). Decarbonization will be considered as part of a comprehensive building upgrade package that includes energy efficiency, weatherization and other necessary repairs. Specifically, the consultant will:

Provide a data review and impact analysis on the opportunities and challenges associated with transitioning existing residential and commercial buildings including, but not limited to:

- public health and safety
- economic costs and savings (including inaction or delayed action)
- financing tools
- technical feasibility
- electrical infrastructure capacity and costs
- legal implications
- labor and workforce
- operations
- housing affordability
- equity

Task 4 Deliverables:

- Existing Building/Retrofit Impact Assessment Summary, including description of methods and analytical approach (a conceptual analysis for planning purposes, not an engineering feasibility study)

#### **Task 5. Stakeholder/Community Engagement**

The consultant, with guidance from City staff and the steering committee, will conduct a comprehensive, meaningful and equitable community engagement effort to gain insight and feedback from key stakeholders that are directly impacted by this work. This information will also help in identifying what different approaches are most effective for different properties and audiences for education/outreach efforts. Specifically, the consultant will:

- Identify and curate a list of key stakeholders from the building community with a new construction focus (utilities, labor unions, housing advocates, developers, architects, builders/remodelers, secondary contractors, homeowners, community-based organizations, etc.)
- Conduct surveys, interviews, virtual/in-person focus groups (as budget allows)
- Recommend education/outreach strategies for anticipated new construction code requirements

Task 5 Deliverables:

- Summary of stakeholder/community engagement, including notes, surveys, video recordings, etc.

- Summary of education/outreach strategy recommendations

### **Task 6. Existing Building/Retrofit Electrification Implementation Plan**

The consultant, with guidance from City staff and the steering committee, will develop an implementation plan. Specifically, the consultant will:

- Conduct cost analysis to identify most cost-effective options for different building types, including building repair and maintenance needs
- Identify existing policies and programs that can be leveraged (MF tax exemption, home repair, energy efficiency, weatherization, etc.)
- Include framework for equity and address concerns with resident displacement, access to technical/financial assistance programs and need for streamlined application (especially for low-income homeowners)
- Overlay building stock analysis with socio-economic indicators (Tacoma Equity Index);
- Develop a pathways road map for policy and program implementation (voluntary adoption with incentives, building performance standards, point of sale, equipment replacement, code requirements, etc.)
- Include road map phasing recommendations (by building type? neighborhood? other criteria?)
- Identify financial incentives and potential partners (motivators for different situations – owner-occupied vs. rental; residential vs. commercial vs. industrial)
- Explore what types and levels of private and public investment are needed for an effective program/s
- Address current and emerging equipment technology and availability, installation capacity, ease of use by owners/tenants, etc.
- Consider weather extreme events and associated data

Task 6 Deliverables:

- Existing Building/Retrofit Implementation Plan (a conceptual analysis for planning purposes, not an engineering feasibility study)
- Supporting documents

### **Task 7. Tacoma Community Building Decarbonization Strategy**

The consultant, with guidance from City staff and the steering committee, will draft a strategy report that summarizes work completed through the research/data review, impact assessments, stakeholder/community engagement and implementation plan. Specifically, the consultant will:

- Provide an Executive Summary that can stand alone as a document for targeted audiences and purposes
- Provide summary of research/data review
- Include cost and technical analysis
- Include a detailed discussion of strategy, based on results/recommendations for each task
- Create graphics that emphasize current status and pathway recommendations
- Discuss equity implications
- Call out next steps/actions
- Define private and public entity roles in this work
- Outline an education/outreach plan

- Identify financial tools and funding opportunities

Task 7 Deliverables:

- Final Strategy Report summarizing all work completed for Tasks 2-6 (a conceptual analysis for planning purposes, not an engineering feasibility study)