

HCR Integrated Physical Needs Assessment Provider RFQL Informational Webinar

Updated August 2025

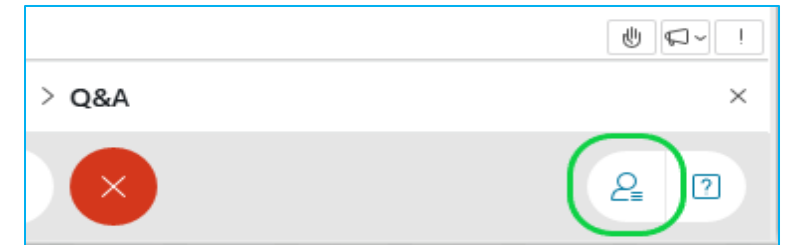


Meeting Procedures for Attendees

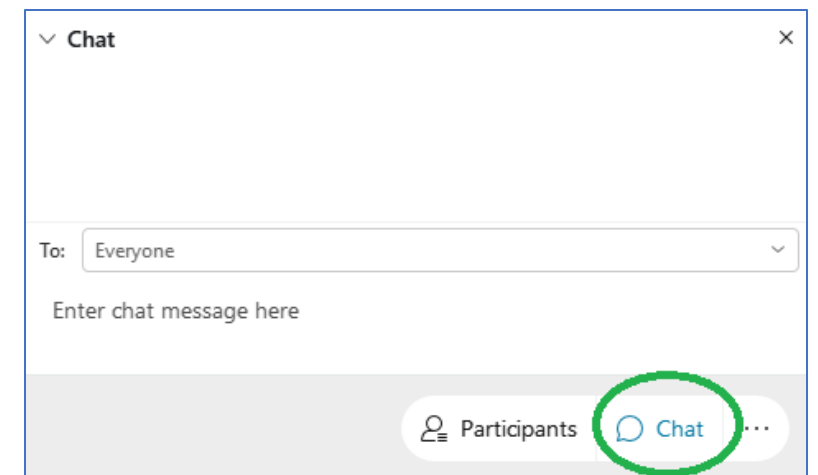
Before beginning, a few reminders to ensure a smooth discussion:

- > Given the size of the group, we will keep all attendees muted.
- > If you want to ask a question, please submit one to the panelists in the Q&A feature. Questions submitted through Q&A are only visible to panelists. We will address questions at the end.
- > The Chat feature is also open and visible to all attendees and panelists.
- > Slides will be distributed to registrants after the event.

Q&A



Chat



Presenters

Sunitha Sarveswaran

Director of Sustainability Programs
New York State Homes & Community Renewal

Brian Houstle, RA

Sustainability Specialist
New York State Homes & Community Renewal

Maria Cangiano

Senior Project Manager, Multifamily
NYS Energy Research and Development
Authority

Agenda



IPNA Standard and Tool Overview



MREP Application Process



RFQL Submittal Process



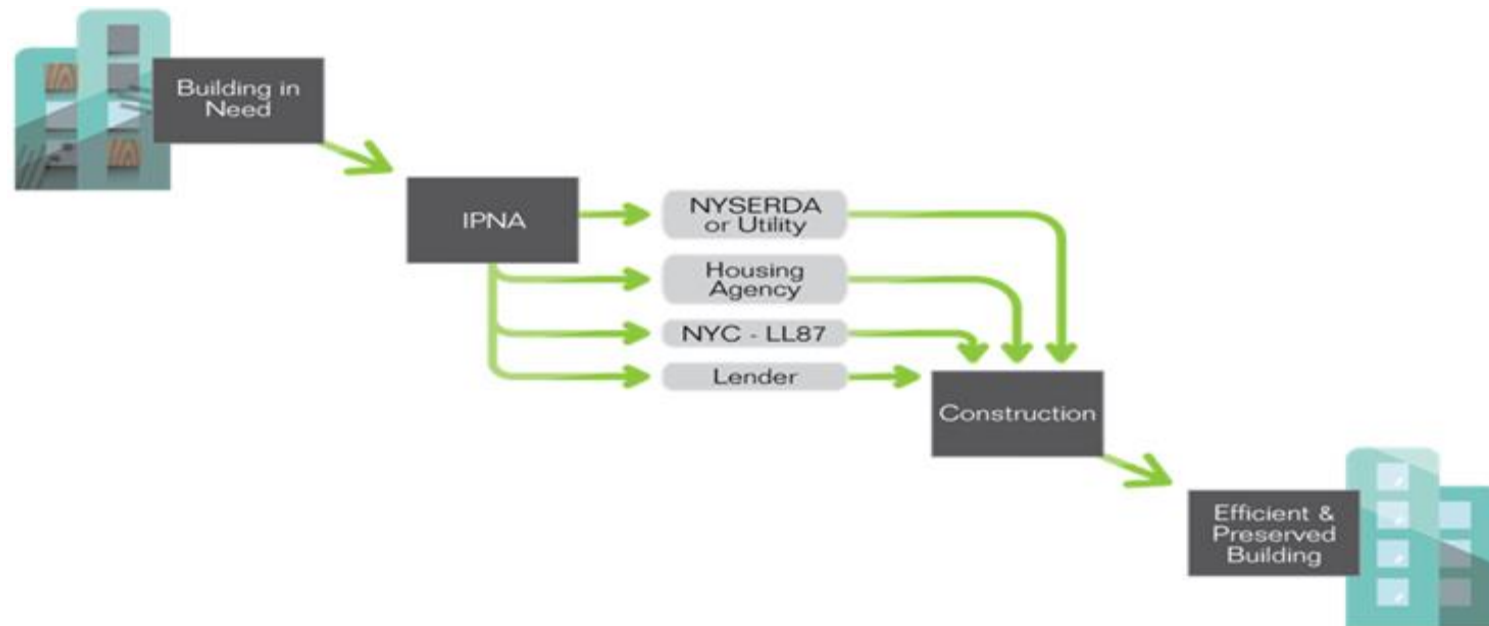
Q&A

IPNA Standard/Tool Overview

What are IPNAs?

PNA + ENERGY/WATER AUDIT + HEALTH ASSESSMENT = IPNA

The Integrated Physical Needs Assessment (IPNA) merges traditional PNAs, energy audits, solar screening, and screening of housing-based health issues.



Why Perform IPNAs?

- > IPNA is required for participation in multifamily affordable housing **financing programs**.
- > IPNA **streamlines** access to more preservation **funding** and assistance from energy program implementers (e.g. NYSERDA, utilities).
- > Helps to be able to identify and leverage **water and energy cost savings** to fund the project.
- > Helps agencies understand **which items need repair immediately or are nearing their end-of-life to ensure that they are included in project scopes**.
- > Promotes an integrated approach that takes advantage of **synergies** between physical, environmental and health benefits.
- > Ensures every owner of an affordable multifamily building in NYC and NYS who accessed public financing for rehabilitation work uses a **standardized process** for evaluation of energy efficiency, water conservation, and health-related improvements as part of capital planning process.

IPNA Documentation

> IPNA Standard

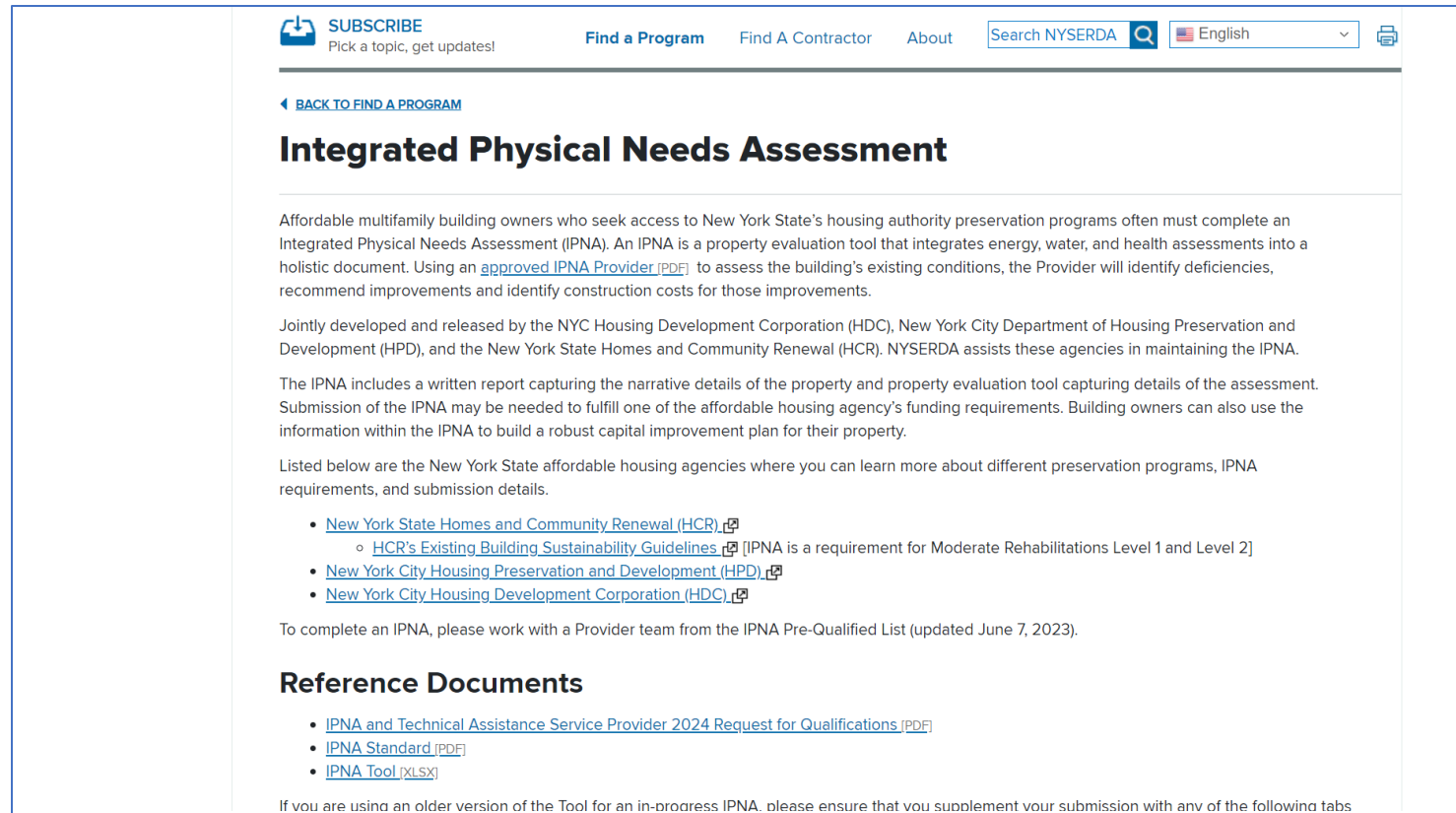
- Overview of IPNA process
- Minimum requirements for IPNA Providers – Needs Assessor and Energy Assessor
- IPNA Requirements
- Compatibility with local laws
- Description of tabs in the IPNA Template/Tool
- Sampling requirements for multiple building projects

> IPNA Template/Tool

- Excel based Tool to enter building information, inspection findings, replacement schedule and other requirements
- Tool includes the PSS (Project Summary Sheet) to assist with FlexTech alignment for energy assessment

Where To Find All IPNA Resources

NYSERDA's IPNA Landing Page: <https://www.nyserda.ny.gov/ipna>



The screenshot shows the NYSERDA website's IPNA landing page. At the top, there is a navigation bar with a 'SUBSCRIBE' button, a search bar, and a language dropdown set to 'English'. Below the navigation bar, there is a link to 'BACK TO FIND A PROGRAM' and a main heading 'Integrated Physical Needs Assessment'. The main content area contains several paragraphs of text explaining the IPNA process, followed by a bulleted list of links to related resources. At the bottom, there is a section for 'Reference Documents' with three links to PDF and XLSX files.

SUBSCRIBE
Pick a topic, get updates!

[Find a Program](#) [Find A Contractor](#) [About](#) English

[← BACK TO FIND A PROGRAM](#)

Integrated Physical Needs Assessment

Affordable multifamily building owners who seek access to New York State's housing authority preservation programs often must complete an Integrated Physical Needs Assessment (IPNA). An IPNA is a property evaluation tool that integrates energy, water, and health assessments into a holistic document. Using an [approved IPNA Provider](#) to assess the building's existing conditions, the Provider will identify deficiencies, recommend improvements and identify construction costs for those improvements.

Jointly developed and released by the NYC Housing Development Corporation (HDC), New York City Department of Housing Preservation and Development (HPD), and the New York State Homes and Community Renewal (HCR). NYSERDA assists these agencies in maintaining the IPNA.

The IPNA includes a written report capturing the narrative details of the property and property evaluation tool capturing details of the assessment. Submission of the IPNA may be needed to fulfill one of the affordable housing agency's funding requirements. Building owners can also use the information within the IPNA to build a robust capital improvement plan for their property.

Listed below are the New York State affordable housing agencies where you can learn more about different preservation programs, IPNA requirements, and submission details.

- [New York State Homes and Community Renewal \(HCR\)](#)
 - [HCR's Existing Building Sustainability Guidelines](#) [IPNA is a requirement for Moderate Rehabilitations Level 1 and Level 2]
- [New York City Housing Preservation and Development \(HPD\)](#)
- [New York City Housing Development Corporation \(HDC\)](#)

To complete an IPNA, please work with a Provider team from the IPNA Pre-Qualified List (updated June 7, 2023).

Reference Documents

- [IPNA and Technical Assistance Service Provider 2024 Request for Qualifications](#) [PDF]
- [IPNA Standard](#) [PDF]
- [IPNA Tool](#) [XLSX]

If you are using an older version of the Tool for an in-progress IPNA, please ensure that you supplement your submission with any of the following tabs

Pre-Qualified Providers

- > Providers are teams of “Needs Assessors” + “Energy Assessors”
- > **Only providers of pre-qualified firms** are authorized to complete the IPNA template and submit reports on behalf of projects
- > This year, **RFQL for becoming solely a Provider for HCR** buildings released.
 - It was released on **8/13** and applications are due on **9/15**.
- > Check up to date list to partner with an IPNA Provider: nyserdera.ny.gov/ipna

New York City Housing Development Corporation (HDC)
New York City Department of Housing Preservation & Development (HPD)
New York State Homes and Community Renewal (HCR)
New York State Energy Research and Development Authority (NYSERDA)

Integrated Physical Needs Assessment (IPNA) Pre-Qualified Firms List
 (Updated 07/08/2025)

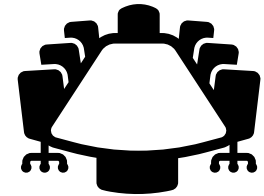
Approved Providers:

Team	Needs Assessor	Energy Assessor
#1	Agarabi Engineering, PLLC Mina Agarabi, PE, CEM, BCxP, CMVP info@agarabiengineering.com 646-979-0509 57 W 38 th Street, #302 New York, NY 10018	Agarabi Engineering, PLLC Mina Agarabi, PE, CEM, BCxP, CMVP info@agarabiengineering.com 646-979-0509 57 W 38 th Street, #302 New York, NY 10018
	PAR Engineering, PLLC Patricia A. Rodriguez, PE prodriguez@par-eng.com 646-791-6140 68 Jay Street, Suite 201 Brooklyn, NY 11201	
#2	Arcadis of New York, Inc. Ed Macdonald Ed.Macdonald@arcadis.com 703-203-8879 110 West Fayette Street, Suite 300 Syracuse, NY 13202	Arcadis of New York, Inc. Ed Macdonald Ed.Macdonald@arcadis.com 703-203-8879 110 West Fayette Street, Suite 300 Syracuse, NY 13202
	Association for Energy Affordability, Inc. (AEA) Peter Hoyle phoyle@aea.us.org 212-279-4307 105 Bruckner Blvd New York, NY 10451	Association for Energy Affordability, Inc. (AEA) Peter Hoyle phoyle@aea.us.org 212-279-4307 105 Bruckner Blvd New York, NY 10451

IPNA Development Process

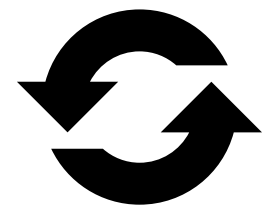
> Management Committee

- Body of NY-based affordable housing agencies that deliberate on IPNA matters, including updates to the tool and standard, training opportunities and maintaining a list of pre-qualified firms.
- Management Committee consists of members of HPD, HDC, and HCR. NYSERDA serves an advisory role and helps conduct the meetings.



> IPNA Routine Updates

- IPNA Standard and Template are updated as needed and the new Standard and Tool updates may be released in late 2025/early 2026. Email notification will go out regarding this, no webinar will be held.
- RFQL for pre-qualified firms occurs every **year** based on agency needs.



Main Driver of 2025 Updates

- ✓ Conformance with Agency Sustainability Guidelines
 - [2025 HCR Sustainability Design Guidelines: Existing Buildings](#)
- ✓ State Electrification Goals
- ✓ Continual improvement of tool functionality and standard accuracy



HCR SUSTAINABILITY GUIDELINES: EXISTING BUILDING

HCR.NY.GOV
2025



Homes and
Community Renewal

Kathy Hochul, Governor
RuthAnne Visnauskas, Commissioner/CEO

Multifamily Residential Energy Pathways Participating Contractor Network (MREP)

Application Process

MREP Provider Network

- > Network of NYSERDA-qualified firms who work to plan and implement energy efficiency and carbon reduction projects in MF buildings
- > The network seeks to provide comprehensive building upgrades to existing buildings
- > Firms applying to become an **Energy Assessor** under the IPNA RFQL must become an MREP (Multifamily Residential Energy Pathways) Participating Contractor within **90 days** of the approval notification if not already an MREP provider, FlexTech consultant, or the previously available MFBSN

How to Apply

Access the MREP Website

<https://www.nyseda.ny.gov/All-Programs/Become-a-NYSERDA-Qualified-Contractor/Multifamily-Residential-Energy-Pathways-Participating-Contractor-Network>



Online Portal for Applications




Upload supporting documents



Submit Application

Minimum Requirements for MREP

> Certifications, Accreditations, and Licenses

- At least one member of a Provider's team must have one of the following designations 

> Industry Experience

- 5 years of industry experience

> Insurance

- Commercial General Liability
- Workers Compensation
- Employers Liability
- Disability Benefits
- Professional Liability Insurance

Designator Entity	Title
AEE	Certified Energy Auditor (CEA)
AEE	Certified Energy Manager (CEM)
BPI	Multifamily Building Analyst (MFBA)
State Licensing Board	Licensed Architect (RA)
State Licensing Board	Professional Engineer (PE)

MREP Scoring Detail Overview

- Minimum score of 80 to qualify
- Participating Contractor User Guide available on the MREP website

<https://www.nyserda.ny.gov/multifamilycontractornetwork>

Scoring Details for the Standard Application	
Available Points	Evaluation Criteria
0	Profile and Minimum Requirements <ul style="list-style-type: none"> • Certifications, Accreditations and Licenses • Insurance • W-9 Form • Signed Participation Agreement
30	Case Studies
23	Business Qualifications <ul style="list-style-type: none"> • MWBE, SDVOB Certifications • Work Experience • Business Stability • Geographic Coverage • Staffing Plan
15	Customer References <ul style="list-style-type: none"> • Three separate relevant customer references provided
12	Management Plan <ul style="list-style-type: none"> • Customer Service Plan • Quality Control Plan
30	Category Specific Technical Documents <ul style="list-style-type: none"> • Technical Assistance - Energy Audit - Must be ASHRAE Level II or III • Installers – Sample Bid Package
<u>110 Total Points Available</u>	

MREP Shortened Application Scoring Detail

- This is available for a limited time for providers participating in comparable programs:
 - MFBSN
 - Comfort Home Contractor
 - Empower+ Contractor
 - FlexTech Consultant
 - NYS Clean Heat Contractor
 - AMEEP Contractor
 - WAP Subgrantee
 - HPD Pre-Qualified Vendor
 - NYC Accelerator Service Provider
 - NYCHA PACT Developer & GC
- Minimum score of 16 points to qualify

Scoring Details for the Shortened Application	
Available Points	Evaluation Criteria
0	Profile and Minimum Requirements <ul style="list-style-type: none"> • Certifications, Accreditations and Licenses • Insurance • W-9 Form • Proof of Existing Network Membership or Completed Project • Signed Participation Agreement
8	Business Qualifications <ul style="list-style-type: none"> • M/WBE, SDVOB Certifications • Industry Experience • Geographic Coverage • Staffing Plan
12	Management Plan <ul style="list-style-type: none"> • Customer Service Plan • Quality Control Plan
<u>20 Total Points Available</u>	

Application Evaluation Process

- > NYSERDA is not responsible for and will not reimburse applicants for costs incurred to develop Applications
- > Applicants can typically expect notification of status **6-8 weeks** after the application package has been submitted
- > Accepted Providers will attend a mandatory virtual Provider Orientation
- > Email mrepnetwork@nyserda.ny.gov with any application questions

Additional Benefits of MREP

- > Access NYSERDA incentives
- > Grow your customer base and generate leads
- > Enhance your reach and reputation
- > Build your skills and network
- > Tap into technical assistance

RFQL Submittal Process

Required Items for Submission:

- 1) Cover Letter**
- 2) Statement of Qualification & Experience**
- 3) References**
- 4) Statement of Good Standing**
- 5) Additional Documentation**

Cover Letter

> One Page Document on company letterhead

- The Cover letter must:
 - Summarize your company's ability to perform all services required for a thorough and complete IPNA report as per the requirements outlined in the **Standard & RFQL**
 - Provide your company organizational data
 - *Legal Name of Organization*
 - *Primary Contact (firm's primary staff contact for this RFQL)*
 - *Contact's Title*
 - *Contact's Telephone and Email Address*
 - *Physical Address (specify headquarters, relevant satellite offices and geographic scope of services for each)*
 - *Web Address*
 - *Age of Organization*
 - *Legal Status of Organization*
 - *Number of Employees*
 - *Audited Financial Statement for the most recent year available*
 - *Organizational History*

Statement of Qualification & Experience

> Relevant Experience & Case Studies

- Describe your company's experience
- Provide **3** case studies showcasing experience in:
 - Performing comprehensive building capital needs assessments
 - Energy/water audits
 - Recommending short- and long-term scopes for building capital needs
 - Recommending short- and long-term best practices for operations and maintenance
 - Conducting energy savings analysis and cost estimates for recommended energy capital needs
 - Creating plans and specifications for rehabilitation scopes
 - Provide a sample IPNA, GPNA, and/or Energy Audit conducted by your company
 - Reference the RFQ for additional requirements.

> Personnel Qualifications & Resumes

- Provide an organizational chart listing all personnel performing and overseeing elements of the IPNA report
- For multidisciplinary teams, identify the point of contact responsible for management of the overall team
- List accreditations of team members
- Energy assessor must be an approved provider in NYSERDA's Multifamily Building Solutions Network or FlexTech Consultant or MREP list
 - Providers who are not can receive conditional approval and be granted a 90-day window to complete the approval process for the MREP network.

References & Statement of Good Standing

- > 3 client references for similar projects
- > Statement of Good Standing:
 - State whether your firm is in good standing with all divisions of City, State and Federal Government
 - Describe any outstanding issues in detail

Additional Documentation

1) Insurance

- Proof of Professional Liability Insurance
- Worker's Compensation
- Employers Liability Insurance

2) Fee Proposal: Part C



3) Disclosure and Conflict of Interest Form

INTEGRATED PHYSICAL NEEDS ASSESSMENT

See Tiers below based on unit count.

Base Price	Incremental Cost Per Unit	Base Price	Incremental Cost Per Unit
\$ _____	\$ _____	\$ _____	\$ _____

TECHNICAL ASSISTANCE PROVIDER SCOPE OF SERVICES

	Very small Buildings 1- 4 units	Small Buildings 5- 25 units	Medium Buildings 26-50 units	Large Buildings 51-200 units	Very Large Buildings 201 + units
	Base Price or Percentage of Hard Costs	Base Price or Percentage of Hard Costs	Base Price or Percentage of Hard Costs	Base Price or Percentage of Hard Costs	Base Price or Percentage of Hard Costs
Development of Scope, Plans, and Specifications					
Facilitation of Bid Process					
Owner's Representative Services					

Tenure of Services

- > Once your team is accepted onto the Pre-Qualified Consultant list - no need for re-application
- > However, all teams must submit **annual updates** to retain active status:
 - Organizational Charts
 - Accreditation
 - Resumes
 - Insurances
 - Fee Proposal Sheet
- > The IPNA Management Committee may request additional information

Deadline...

September 15th

All questions received will be answered and shared with all applicants

Email Questions & Submissions to:

IPNAreviews@nyserda.ny.gov



Q&A