

Project Manager Qualification Form January 1, 2023 – December 31, 2023

The Maryland Department of Housing and Community Development (DHCD) offers funding assistance for multifamily energy conservation retrofit projects through the Multifamily Energy Efficiency and Housing Affordability Program (MEEHA). MEEHA can provide funding to project owners for Qualified Project Managers that assist project owners through the MEEHA funding process, by completing a defined set of tasks. DHCD maintains a “Qualified Project Manager” list on an ongoing basis and requires annual submission to reaffirm qualification.

This qualification form must be executed by a responsible individual authorized to legally bind the entity to enter into agreements and signed by project managers.

New applicants seeking consideration for inclusion on the [Qualified Project Manager](#) List are required to have acted as a project manager for at least three (3) multifamily energy efficiency retrofit projects in the State of Maryland within the past 5 years. Additionally, the applicant must meet the following minimum requirements:

- One year experience coordinating or assisting with the coordination of submitting required documents for funding, financing, or rebate programs.
- One year experience procuring or assisting with the procurement of contractors.
- One year of experience obtaining and reviewing product specification sheets.
- One year of experience inspecting completed energy efficiency work for quality control purposes.
- One year of experience scheduling contractors to perform energy efficiency work.
- One year of experience coordinating the scheduling of contractors with property management to allow contractor access to tenant units.
- One year of experience using video conferencing software on-site or in remote locations.

Approved Qualified Project Managers will be included on a Qualified Project Managers List. The list is available on MEEHA’s website. DHCD does not endorse any project manager through the Qualified Project Managers List; rather, it identifies those that meet the listed criteria. Project owners who choose to utilize a Qualified Project Manager can choose a Project Manager from this list when applying for MEEHA funding. Owners utilizing one of these Project Managers may be reimbursed for some of the cost.

Qualified Project Managers assist project owners throughout the funding process. Responsibilities of the Qualified Project Manager include, but are not limited to, the following:

1. Coordinate the submission of the application and associated application documents.
 2. Complete Application Site Visit Worksheet and submit worksheet and required pictures to DHCD.
 3. Assist Project Owner to procure a Qualified Energy Auditor.
 - Project managers may also act as the Qualified Energy Auditor for the same project.
 4. Solicit contractor bids for energy efficiency improvement measures.
 - Project managers may also act as the contractor for the same project.
 5. Assist project owner with selecting the contractor(s) for the retrofit project.
 - When a project manager is acting as the contractor for a project but does not have the ability to complete specific measures, the project manager must still assist the owner with soliciting bids and selecting the contractor(s) for the retrofit project.
 6. Provide contractor cost information to the energy auditor for the auditor to perform the economic analysis.
 7. Submit the completed Audit Report and Funding Request to DHCD.
 8. Correspond with Ownership and DHCD to finalize the scope of work and funding amount.
 9. Assist project owners to organize and submit required underwriting and legal review documents.
 10. Submit product specification sheets for approval to DHCD for all program funded measures.
 11. Provide DHCD a construction schedule, monthly construction updates of work progress, and notifications of any delays or setbacks that may occur.
 12. Coordinate retrofit activities between property management and contractors. Complete and submit requisitions and supporting documentation for installed measures to DHCD at the owner's request.
 13. Correspond with DHCD to schedule progress or requisition inspections.
 14. Assist in the completion of DHCD progress and requisition inspections.
 - Most progress or requisition inspections happen remotely. The Project Manager must have the capability to live video conference the on-site inspection with the Energy Construction Management Officer.
- ❖ Entities that do not adequately perform the duties stated above may be removed from the Qualified Project Manager list at DHCD's sole discretion.



This form must be executed by a responsible individual authorized to legally bind the person or entity to enter into agreements.

By signing this form, the individual/entity identified below (hereinafter, the “Applicant”) hereby acknowledges that it has read this application form and agrees to perform the duties as outlined here and in DHCD’s guidance. Applicant further represents and warrants that all personnel that will perform Project Manager activities for the MEEHA program are aware of the requirements outlined in this application. Additionally, the applicant must sign the Project Manager Qualification Form Affidavit of Experience.

Applicant understands that any agreement to provide services will be between Applicant and the property owner. Applicant understands that DHCD will not be entering into any agreement with Applicant and shall not be liable to Applicant for any monetary payment, any obligation to be performed, or any damages in any way relating to Applicant’s performance of services.

Entity/Individual name

Phone number

E-mail Address

Signature

Date

Printed name

Title

