



# Contractor Network Training and Testing Services Request for Proposals

**RFP Release Date:** 05/09/2023

**Bidder Questions Due:** 05/16/2023

**Answers Posted:** 05/23/2023

**Proposals Due:** 06/27/2023

## Summary

Efficiency Vermont, a statewide Energy Efficiency Utility, is seeking proposals from professionals or organizations for **Contractor Network Training and Testing**. Responses to this Request for Proposals (RFP) must be delivered electronically to VEIC by **5 p.m. EDT on Tuesday, June 27<sup>th</sup>, 2023**. Efficiency Vermont will not accept responses submitted after **5 p.m. EDT**. Please submit your response electronically via e-mail to: [rking1@veic.org](mailto:rking1@veic.org) with **RFP Submittal for Contractor Network Training and Testing Services** in the subject line.

VEIC will respond to individual questions regarding this RFP only as follows: VEIC will receive questions regarding requirements and scope of work up to **5 p.m. EDT Tuesday, May 16<sup>th</sup>, 2023** via e-mail only, to [rking1@veic.org](mailto:rking1@veic.org) with **BPI Training and Testing Question in the subject line**. When appropriate, please refer to the RFP page number and section heading for ease of navigation and response. Efficiency Vermont will post answers on the Efficiency Vermont website <https://www.veic.org/requests-for-proposals> no later than **Tuesday, May 23<sup>rd</sup>, 2023**. VEIC will not address questions submitted after **Tuesday, May 23<sup>rd</sup>, 2023**.

## Background

### Vermont Energy Investment Corporation

Vermont Energy Investment Corporation (VEIC) is a mission-driven, nonprofit organization dedicated to reducing the economic and environmental costs of energy use. It carries out its mission, in part, by designing and implementing innovative energy efficiency and renewable energy programs. Founded in 1986, VEIC is nationally and internationally recognized for advancing energy efficiency, energy conservation, and renewable energy programs and projects across the United States, Canada, and Europe. VEIC employs 280 professionals and is

headquartered in Winooski, Vermont. It has offices also in Washington, DC, and Ohio. For additional information, please see: VEIC website: [www.VEIC.org](http://www.VEIC.org)

VEIC is a **Just-labeled** organization, committing itself to corporate transparency on social justice and equity indicators. We've also adopted the **Social Vulnerability Index** across our entire organization to measure the impact our work has on underserved communities. With ongoing employee engagement in **social and energy justice principles**, justice and fairness are embedded in everything we do. We see opportunities everywhere to create new tools that can help us build the kind of company—and the kind of society—we want to see.

## Efficiency Vermont

Launched January 1, 2000, Efficiency Vermont helps ratepayers reduce energy costs, strengthen the local economy, and protect the environment by making homes and business energy efficient. Efficiency Vermont provides technical assistance, rebates, and other financial incentives to help Vermont households, businesses and other institutions—such as K-12 schools—reduce their energy costs with energy-efficient equipment, lighting, and approaches to construction and major renovation. Efficiency Vermont partners extensively with contractors, suppliers, and retailers of efficient products and services throughout the state.

VEIC operates Efficiency Vermont under an Order of Appointment issued by the Vermont Public Service Board. For additional information, please see the Efficiency Vermont website: [www.encyvermont.com](http://www.encyvermont.com)

# Scope of Work and Schedule

## RFP and Implementation Schedule

Table 1. Efficiency Vermont will attempt to adhere to the following schedule but reserves the right to adjust the below schedule as-needed.

RFP release	May 9, 2023
Bidders Questions Due	May 16, 2023
Answers posted	May 23, 2023
RFP responses due	June 27, 2023
Bidder selected	July 7, 2023
Contract negotiations and signature	July 28, 2023
Performance Period	July 2023-June 2024

## Scope of Work

The Efficiency Excellence Network (“EEN”) is comprised of companies and contractors across several trade groups. Efficiency Vermont’s EEN members in different trade groups must have applicable trade ally certifications. Efficiency Vermont is seeking a vendor to provide support in the form of training and written exam and field testing for these certifications, through both in-person and virtual offerings.

The ideal vendor would have experience and will be able to deliver these services to students:

- Manage student registration and communications for course format, materials, testing, course completion and certification maintenance requirements
- Provide 24 Hour access to Online Course content
- Provide and mail hard copy Course Study Guide and Field Exam Checklist, and offer digital format of the course materials at no extra cost to student
- Technical Standards and Formula Reference Sheet
- Exam Prep Tutorials and On-demand Videos
- Individual coaching for participants
- Technical Support for students to ensure access to online platforms
- Provide proficiency testing for various industry recognized and third party rated Energy Efficiency Certifications for various trade ally groups, at minimum Building Analyst Technician (BA-T) and Building Analyst Professional (BA-P) certifications
- Reporting to Efficiency Vermont on student status including test results, both written and field, for each student
- Provide tools to support students with learning disabilities and remove barriers to access course content and mitigate barriers to successful exam completion

The vendor will work collaboratively with Efficiency Vermont staff who may want to coach mentor students in a one-on-one setting, particularly to provide in-field testing support. Efficiency Vermont expects students who pursue certifications to be motivated to join relevant Efficiency Excellence Network trade groups.

# Preparing and Delivering a Proposal

For ease and efficiency of review, Efficiency Vermont has specified the requirements for submitting a proposal to this RFP. Bidders must follow, and be responsive to, all requirements of this RFP. Proposals should be clear and concise, presented in the form of a written response with sections and sub-headings. Proposals that are not in the required format or incomplete may be disqualified at Efficiency Vermont’s sole discretion.

Bidders are required to propose, and will be scored upon, the individual criteria summarized in Table 2. **Every bidder is required to include a Bid Summary Table based on Table 2** below with the specific value or information they propose for each of the listed criteria. The Bid Summary Table shall be presented as part of the narrative summary.

Table 2: Response Summary, Evaluation Criteria and Points

Scoring Category/Criteria	Max Points
<b>Demonstrated ability to provide the required services including but not limited to the qualifications of firm and staff, and previous experience providing these services.</b>	15
<b>Proposed pricing structure (strong preference for a per-student/per-course/per-certification structure with any additional costs noted separately, but will consider other proposed pricing structures)</b>	25
<b>Ability to accommodate accessibility based needs to accommodate learning styles or mitigate barriers to access.</b>	30
<b>Demonstrated ability to usher students successfully through to certification via offerings and design.</b>	30

## Response Requirements

- A. **Company Info:** Name of the business, contact person, and contact information including full legal name, address, telephone, mobile telephone number, e-mail address, and website address, as applicable.
- B. **Company profile:** a brief company profile, not exceeding 500 words, including any subcontractors.
- C. **Statement of ownership:** the type of business entity (sole proprietorship, corporation, LLC, or other).

- D. Narrative and Bid Summary Table:** a narrative outlining their approach to the Scope of Work and include proposed values or summary information for each of the scoring criteria listed in Table 2 above. (The values that the bidders provides in the bid summary table are its proposed values, which will not be binding on Efficiency Vermont. Efficiency Vermont in its sole discretion will determine the final values to be awarded to each bidder.) Efficiency Vermont is interested in responses that include details on the training approaches that the vendor can provide including but not limited to in-person, on-demand, or live training sessions.
- E. Binding Transmittal Letter** (1 page maximum): Each proposal must include a binding transmittal letter signed by a party authorized to obligate the bidder to the services described in their proposal. The letter must clearly identify the person authorized to serve as the organization’s representative for future communications regarding the response. The letter must state that the proposal is valid for 60 days.
- F. Budget** (5 pages maximum): Each proposal must include a detailed budget. Bidder must include in their proposal a description of any assumptions made regarding the Scope of Work that may have an impact on the budget. Labor rates may be attached as a separate appendix.
- G. Qualifications and Team Experience** (5 pages maximum): This section of the response must demonstrate the bidder’s team’s (including any subcontractors) knowledge, experience and ability to successfully complete the Scope of Work.

Provide details on the roles and responsibilities of key personnel and team members including any subcontractors. Experience should include certifications and trainings for key staff.

- H. Proposal Exceptions Summary Form.** A Proposal Exception Summary Form (see below) with exceptions to items in any section of this RFP or the Efficiency Vermont’s Standard Contract terms and conditions. Failure to note exceptions on the Proposal Exception Summary Form will be deemed to be acceptance of the terms of this RFP and Efficiency Vermont’s Standard Contract terms and conditions in Appendix A. Efficiency Vermont will take these exemptions into consideration when evaluating responses. If exceptions are not noted in bidder’s proposal but raised during contract negotiations, Efficiency Vermont reserves the right to cancel the negotiations and award projects to other bidders. If Bidder would like to propose their contract template, a copy of the template should be attached as an appendix.

RFP/ Contract Reference	Bidder's Proposal Reference	Brief Explanation of Exception
(Reference specific outline point to which exception is taken)	(Page, section, items in bidder's proposal where exception is explained)	(Short description of requested exception)
1.		
2.		

- **Certificate of Insurance.** Bidder must supply a current Certificate of Insurance showing evidence of General Liability. If awarded a Contract, bidder will also be required to provide a final certificate of insurance to show compliance with the minimum insurance requirements outlined in the successful bidder's contract. Efficiency Vermont anticipates the minimum requirements to be as outlined below but will confirm final insurance requirements prior to issuance of a contract. The final certificate of insurance shall comply with the requirements outlined in Efficiency Vermont's Standard Contract (**Appendix A**). Bidder must raise any questions about the insurance requirements by the deadline set forth above and must identify any exceptions to the anticipated minimum requirements in its response.

Insurance Policies	Limits
Commercial General Liability	\$1m per occurrence/\$2m aggregate
Automotive Liability	\$1m per occurrence single limit for bodily injuries and property damage
Crime Insurance	\$1m per occurrence for dishonest acts of Subcontractor's employees which result in a loss to VEIC.
Workers' Compensation	Statutory mandates
Employer's Liability	\$500k per accident; \$500k per disease; \$500k policy disease limit
Professional Liability Insurance (Errors & Omissions)	\$1m per occurrence/\$2m aggregate
Cyber Liability Insurance	\$1m per occurrence/\$1m aggregate

- Disclosure of any pertinent litigation
- A bidder must disclose any past or pending judgments, lawsuits, actions, bankruptcies or regulatory decisions or information that may adversely affect the bidder's ability to meet any requirements of this RFP, the subcontract or the bidder's proposal. A bidder agrees to provide a detailed description of any of the above events and the applicable case number in its proposal.
- This disclosure obligation is an on-going material obligation that applies from the date of proposal submission through the expiration of any resulting subcontract award. Failure to disclose pertinent litigation may result in the disqualification of Bidder's proposal.
- **Information Security Requirements:** Please review the Information Security Requirements listed in Appendix B and provide a complete Information Security Questionnaire (available for download with this RFP) with your response. Efficiency Vermont will not consider any exceptions or requests to negotiate terms that were not called out as exceptions to the security requirements in the RFP response.

## Limitation

This RFP does not commit Efficiency Vermont to award a contract or to pay any costs incurred in the preparation or submission of proposals. Efficiency Vermont reserves the right to reject any or all proposals received in response to this RFP, to negotiate with any qualified bidder or to cancel in part or in its entirety the RFP, if any of these actions is deemed by Efficiency Vermont in its sole discretion to be in Efficiency Vermont's best interest.