



Request for Information

Home Energy Reports (HERs) Services

RFI Release Date: January 4, 2021

Responses Requested By: January 29, 2021

Summary

VEIC, a non-profit corporation, requests responses to this RFI for a **Residential Customer Behavioral Savings Program in the form of Home Energy Reports (HERs)** for Vermont's energy efficiency utility, Efficiency Vermont. The project is expected to contribute significantly to Efficiency Vermont's non-automated residential energy savings on behalf of all Vermont ratepayers.

Responses to this Request for Information (RFI) must be delivered electronically to VEIC by **5:00 p.m. EDT on Friday January 29, 2021**. Please submit your response electronically via e-mail to: Allison Fode at afode@veic.org with **RFI Submittal for HERs Services** in the subject line.

Background

VEIC is a sustainable energy company on a mission to generate the energy solutions the world needs. For over 30 years VEIC has been working with governments, utilities, foundations and businesses across North America to develop and deploy clean-energy services that provide immediate and lasting change. VEIC administers three major sustainable energy programs as well as providing full-service consulting and engineering capabilities.

Program Overview

Efficiency Vermont intends to implement a program beginning in 2021 to claim behavioral conservation and energy management savings from such intervention activities. The program will build on the experience and lessons learned from consumer behavior studies, existing third-party evaluation reports, and customer feedback on such programs. As such, the program is looking to target approximately 5,000 high-use participants across residential market segments which comprise a smaller pool of overall residential accounts in Vermont.

The HERs program is expected to motivate residential customers in Vermont to undertake energy management and conservation behaviors to reduce energy usage. The HERs program must demonstrate a measurement and verification (M&V) approach to quantify these savings. Efficiency Vermont is particularly interested in innovative solutions designed to align with the current program and market environment, and in approaches that allow Efficiency Vermont to be an active partner in the design and delivery of the customer engagement approach.

Efficiency Vermont's primary objectives are:

1. To develop and implement a proven approach to educate and motivate residential customers to apply

energy saving measures; to quantify and verify behavior-based energy management savings from residential customers.

2. To provide such interventions through customer engagement strategies and delivery mechanisms that integrate with Efficiency Vermont's objectives of electric savings, customer satisfaction and program lift, while increasing the number of program intervention points that can effectively influence customers' use of energy.
3. To provide a seamless customer experience and access to customer data by other Efficiency Vermont programs and systems.
4. To demonstrate the energy savings achieved from engagement strategies and M&V approaches.

Program Requirements:

1. Implement proven engagement channels, outreach methods, messages, etc., to motivate conservation and energy savings.
2. Demonstrate the ability to target and effectively engage specific customer market segments, and sub-segments (e.g. low-income, high-energy users).
3. Implement proven approaches for measurement and verification of behavioral savings – that is, establishing an M&V toolbox with a range of proven approaches that could be applied to address different customer groups, population sizes, or other program objectives.
4. Demonstrate behavioral savings from increased program participation, while adjusting those savings for direct participation in other Efficiency Vermont offerings, to avoid double-counting.

Key criteria for the HERs Services to include:

1. **Program length** – Initial program will last one year from the public launch (not including setup, integration, and testing), with the option to renew for a second year.
2. **Size considerations** – Group sizes for any approaches should be sufficient to meet minimums needed to measure energy savings with statistical validity while accounting for attrition.
3. **Participant pool** – Target approximately 5,000 eligible high use residential accounts in Vermont to participate. Participant pool will comprise a smaller portion of high-use residential accounts.
4. **Data accuracy and transparency** – Home comparison is a critical element to motivating customers to implement behavioral energy saving measures though they also are a source of customer complaints. Program design will need to mitigate dissatisfaction with the program. This may be mitigated by gathering detailed third-party home characteristics, customized reporting, and transparency on sourcing comparison data.

RFI Preferred Format

Standard appearance is: (1) 1-inch margins all around; (2) 11-point or larger font size; (3) use of a standard sans-serif font such as Calibri, Arial, or Helvetica, with normal spacing; (4) total length not to exceed 10 pages.

o Narrative Proposal

- **Influencing customer behavior.** Describe how the home energy reports will influence customers' energy decision-making through: energy use advice; goal setting; awards; peer benchmarking; comparative methods; or other motivational tools.
 - o Provide an overview of the proposed engagement approach. This may include:
 - Description and examples of engagement channels used;
 - Brief summary of the behavioral science and research methodologies supporting sustained customer engagement and response;
 - Information on historic successes with your methods and ongoing

At this time, this is a Request for Information only and does not commit VEIC to award a contract, to pay any costs incurred in the preparation or submission of responses. Depending on the responses received to this RFI, VEIC reserves the right to solicit future bid proposals through a formal Request for Proposals (RFP) and not to be restricted to responses received to this RFI, to communicate or negotiate with any respondent, or to cancel in part or in its entirety the RFI and/or any resulting RFP, if any of these actions is deemed by VEIC in its sole discretion to be in VEIC's best interest.

VEIC

VEIC is a sustainable energy company on a mission to generate the energy solutions the world needs. For over 30 years VEIC has been working with governments, utilities, foundations and businesses across North America to develop and deploy clean energy services that provide immediate and lasting change. With expertise in energy efficiency, building decarbonization, transportation electrification, and new approaches for a clean and flexible grid, VEIC brings innovative solutions to the market. VEIC is nationally recognized for developing pilots and programs that optimize energy use, reduce energy burdens for low-income customers, and advance new technologies. In addition to our full-service consulting business, VEIC administers three large-scale sustainable energy programs: Efficiency Vermont, Efficiency Smart, and the DC Sustainable Energy Utility (DCSEU). www.veic.org.

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

