



## Quality Assurance and Quality Control (QA/QC) for Existing Building Programs

**RFP Release Date: 05/15/2024**  
**Bidder Questions Due: 05/22/2024**  
**Answers Posted: 05/29/2024**  
**Proposals Due: 06/14/2024**

### Request for Proposal

### Summary

Efficiency Vermont, a statewide Energy Efficiency Utility operated by Vermont Energy Investment Corporation (VEIC), is seeking proposals from professionals or organizations for the implementation of **Quality Assurance and Quality Control work for Efficiency Vermont programs for existing homes and buildings in Vermont**, as further described below.

Responses to this Request for Proposals (RFP) must be delivered electronically to VEIC by **5 p.m. EDT on Friday June 14<sup>th</sup>, 2024**. Efficiency Vermont will not accept responses submitted after **5 p.m. EDT**. Please submit your response electronically via e-mail to: [tjohnson@veic.org](mailto:tjohnson@veic.org) with **RFP Submittal for QA/QC for Existing Building Programs** 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 Wednesday May 22<sup>nd</sup>, 2024**, via e-mail only, to [tjohnson@veic.org](mailto:tjohnson@veic.org) with **QA/QC for Existing Building Programs** 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 **Wednesday, May 29<sup>th</sup>, 2024**. VEIC will not address questions submitted after **Wednesday May 22<sup>nd</sup>, 2024**.

### Background

#### 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 over 350 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.efficiencyvermont.com](http://www.efficiencyvermont.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 15, 2024
Bidders Questions Due	May 22, 2024
Answers posted	May 29, 2024
RFP responses due	June 14, 2024
Bidder(s) selected	June 28, 2024
Contract negotiations and signature	July 19, 2024
Performance Period	July 19, 2024 – December 31, 2026

## Scope of Work

Efficiency Vermont is looking to hire one or more professionals or organizations that specialize in home performance and building performance services who can implement a Quality Assurance/Quality Control (QA/QC) process and related services that are lean, effective, and impartial. This work will have the following two priorities:

- A. QA/QC work for projects that complete in 2024 - 2026; and
- B. Partner with Efficiency Vermont to streamline the current QA/QC process with the goal of conserving resources where possible while better serving customers and contractors and still collecting important Program data and feedback for participants.

The goal of the QA/QC function at Efficiency Vermont is to assist Existing Homes customers and small businesses, including but not limited to those in the Home Performance with ENERGY STAR® (HPwES) program and the Building Performance (BP) program, to receive high-quality energy efficiency services from contractors that:

- Provide high quality and thorough air sealing and insulation installations consistent with program guidelines and expectations.
- Ensures project work addresses health and safety consistent with program guidelines and expectations.
- Provide customers with a comprehensive, prioritized list of recommendations and benefits for better building energy performance. This work can be done all at once or over time.
- Accurately represent the scope of work completed and the pre- and post-conditions of the home.

Efficiency Vermont, as a HPwES Program Sponsor, adheres to Program standards outlined by the US Department of Energy (DOE) in conducting field QA/QC visits in its [Program Sponsor Manual](#), meaning that each Program year, a percentage of a unique contractor's projects or at least one project (at a minimum) would have a field QA/QC visit. The US DOE outlines four different phases in which a QA visit can take place: assessment, installation, test-out, and post-completion; it is required that at least 50% of all QA visits must be post-installation. Efficiency Vermont expects to increase focus on QA visits that inspect pre-existing conditions as well as post-installation conditions. QA/QC visits can take place at any time within the year that a project has been completed or can be conducted within six months of a year closing (e.g. a project completed in November of 2023 could receive a QA/QC visit up until June 30 of 2024 ).

All bidders will be required as a part of this RFP and on an ongoing basis to disclose any potential or actual conflicts of interests that may arise in completing the Scope of Work. Efficiency Vermont requires all QA/QC services to be performed in an independent and impartial

manner. Accordingly, successful bidders will be strictly prohibited from performing QA/QC services for any projects in which the bidder has been involved in or has a financial or personal interest in the project.

Submitted proposals should answer the following questions:

- A. What prior experience do you have either in Home Performance with ENERGY STAR® or similar projects or in leading QA/QC on such projects?
- B. What are the expected per unit (per QA/QC visit) costs, keeping in mind that QA/QC visits would need to take place at properties located across the State of Vermont?
- C. If selected, how soon upon contract signature would your organization be ready to conduct in-field QA/QC?
- D. Which services can your organization directly provide, versus which services will you need to subcontract out to another entity? If this entity is already known, please include their name, a brief company profile, and their statement of ownership in your response.
- E. Explain how your organization has approached QA/QC in the past, with a focus on innovation and streamlined QA/QC processes. If an organization's focus has been on building performance project completion, please explain your proposed approach to QA/QC including any documentation or data you might collect.

Efficiency Vermont's current QA/QC procedures and the results of any QA/QC inspection do not constitute a comprehensive inspection for, nor imply compliance or non-compliance with, any law, code, or regulation. This statement pertains also to local building codes. It is the Participating Contractor's responsibility to ensure that work performed through the HPwES and or BP programs complies with all applicable local building codes as well as the Vermont State Residential Building Energy Standards, as confirmed by a local building inspector or other local officials charged with certifying such compliance. Efficiency Vermont does not create or enforce code.

## 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>Expertise and experience</b> in implementation of Home Performance with ENERGY STAR ® projects or programs, overall customer experience, and projects of a similar nature	35
<b>Reasonableness of costs</b> (and thus, likely cost-effectiveness)	20
<b>Proposed approach</b> to the project and overall quality of vendor’s proposal	15
<b>Key personnel qualifications</b> such as licenses, certifications, or other pertinent qualifications	15
<b>Experience in Vermont</b> or similar environments	15

## 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 including proposed values or summary information for each of the scoring criteria listed in Table 2 above. (The values that the bidders provide 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.)
- 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.
- 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. See **Section I (Licenses)** below for more details.

- 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 proposal their contract template, a copy of the template should be attached as an appendix.

<b>RFP/ Contract Reference</b>	<b>Bidder’s Proposal Reference</b>	<b>Brief Explanation of Exception</b>
(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.		

- I. **Licenses:** Bidder must have at least one person on staff with active BPI Building Analyst, BPI Envelope Professional or BPI Building Analyst – Professional Certification for the duration of the contract and must supply a copy of active certification. This person must also have a minimum of 5 years’ experience and a record of comprehensive building envelope and health and safety analysis.

J. **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
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
Umbrella or Excess Liability Insurance	\$3m per occurrence/\$3m aggregate (subcontracts under \$100k will only be required to have \$1m/\$1m)

K. **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 contract 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 contract award. Failure to disclose pertinent litigation may result in the disqualification of Bidder’s proposal.

L. **Disclosure of Disqualification, Suspension or Termination from an Efficiency**

**Vermont Program:** A bidder must disclose if bidder has been disqualified, suspended, or terminated in the past from an Efficiency Vermont Program.

M. **Disclosure of any Conflicts of Interest:** A bidder must disclose any potential or actual conflicts of interests that may arise in completing the Scope of Work. Efficiency Vermont requires all QA/QC services to be performed in an independent and impartial manner. Accordingly, successful bidders will be strictly prohibited from performing QA/QC services for any projects in which the bidder has been involved in the actual work or has a financial or personal interest in the project.

This disclosure obligation is an on-going material obligation that applies from the date of proposal submission through the expiration of any resulting contract award. Failure to disclose potential or actual conflicts of interest may result in the disqualification of Bidder's proposal.

## 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.