



Efficiency Vermont Energy Savings Products Program

RFP Release Date: 04/17/25
Bidder Questions Due: 05/01/25
Answers Posted: 05/15/25
Proposals Due: 05/29/25

Request for Proposals

Summary

Efficiency Vermont, a statewide Energy Efficiency Utility operated by Vermont Energy Investment Corporation (VEIC), is seeking proposals from vendors to provide services in support of Efficiency Vermont's Energy Savings Products program, as further described below. Responses to this Request for Proposals (RFP) must be delivered electronically to VEIC by **5 p.m. EDT on May 29th, 2025**. Efficiency Vermont will not accept responses submitted after 5 p.m. EDT. Please submit your response electronically via e-mail to: lwentz@veic.org with **RFP Submittal for ESP Program** 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 May 1st, 2025**, via e-mail only, to lwentz@veic.org **with ESP Program 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>) no later than **May 15th, 2025**. VEIC will not address questions submitted after May 15th, 2025.

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 the VEIC Website: 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 Utility Commission. For additional information, please see the Efficiency Vermont website: 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	04/17/25
Bidders Questions Due	05/01/25
Answers posted	05/15/25
RFP responses due	05/29/25
Bidder(s) selected	06/12/25
Contract negotiations and signature	06/30/25
Performance Period	07/01/25- 12/31/2026

Scope of Work

Contents of this Scope of Work

- Introduction/Background
- Required Services
- Commitment to Equity and Consumer Protection

INTRODUCTION/BACKGROUND

Comprised of the Low-Income Energy Savings Kit, Rental Property Free Products Program, and the First Time Homebuyer Kit, the Energy Savings Products Program is designed to help reduce energy costs for targeted households by increasing access to energy-saving products. The specific products offered through each program can be adjusted over time to meet the evolving needs of recipients, ensuring they always receive the most effective energy-saving solutions.

The fulfillment vendor handles the sourcing, assembly, and distribution of these kits and products, ensuring they reach eligible recipients efficiently. By providing these products at no cost to customers, the program supports households in making their homes more energy-efficient, ultimately leading to reduced energy expenses and a smaller environmental footprint.

REQUIRED SERVICES

General Scope of Services: The Contractor will serve as fulfillment vendor for the Efficiency Vermont's Energy Savings Products program. As fulfillment vendor, the Contractor will design and execute the distribution of efficiency measures and energy efficiency kits, and in so doing will serve as a brand ambassador for Efficiency Vermont. This work may include but is not necessarily limited to building web portals for Efficiency Vermont staff and customers to place orders, procuring materials, and assembling, designing, and distributing energy efficiency kits and products.

All work under a Contract will be undertaken based solely on one or more "Work Orders" that are issued by VEIC to the Contractor. Each Work Order will specify, at a minimum, the specific Contract Scope of Work to be performed, payment terms, and a Schedule (and such other items as VEIC may deem appropriate).

At the direction of VEIC's Contract Manager, the Contractor will provide the following services:

- Design, develop, launch, and operate online portal platforms for use by Efficiency Vermont Customer Support staff
- Design, develop, launch, and operate online portal platforms for renters and rental property owners to order efficient products
- Design, develop, launch, and operate an online bulk order site for Affordable Housing Partners and other entities
- Design, develop, launch, and operate online portal platform for use by customer segments to be defined by Efficiency Vermont program staff, including first-time homebuyers
- Fulfill all orders placed through online portal platforms for predefined efficient products
- Perform post-launch development enhancements of portal platforms
- Perform changes to the online portal platforms as requested by Efficiency Vermont
- Electronically submit monthly reports and invoices to Efficiency Vermont for reimbursement
- Ensure data security
- Collaboration with Efficiency Vermont to meet customer needs

Additional details on required services are provided below. Proposals should describe vendor's processes and abilities to fulfill required program functions.

Website Portal Design and Development for ESP Program

Contractor shall complete the design and development of website portals that allow Efficiency Vermont Customer Support staff and customers to place orders for approved products. Each website portal shall provide users the ability to enter, at a minimum, installation address, the customer type, housing type (including unit count), additional data as a means for Efficiency Vermont to determine a customer's income category, and other information to confirm program eligibility. The portals shall also allow customers to place an order and generate a \$0.00 invoice with order confirmation and tracking information. The portals must include order functionality that ensures customers can order products no more than once in any given rolling year. Once launched, Contractor will perform post-launch development enhancements of the ordering platforms as requested by Efficiency Vermont.

Vendors' proposals must describe the timeline and costs to build required sites, as well as describe ongoing maintenance costs and/or fees and the expected process for any additions and/or modifications or enhancements.

Vendors' proposals must describe Quality Assurance/Quality Control measures utilized to ensure that orders are fulfilled only for eligible customers.

Vendors' proposals must include portals for the following:

- a. Portal for Efficiency Vermont Customer Support to order products on behalf of customers
- b. Portal for customers to directly order individual products a la carte
- c. Portal for customers to directly order pre-assembled kits

Efficiency Products for ESP Program

Contractor shall provide the following services:

1. Procurement of Efficiency Measures and Compiling Orders for Delivery: Contractor shall procure approved efficiency measures for distribution and compile the orders requested by eligible customers through the website portals. Each shipment shall contain the selected efficiency products and smaller carrier boxes with an Efficiency Vermont logo sticker affixed to each box. Efficiency Vermont will provide Contractor with a jpeg file containing its logo for production of stickers.

Vendors' proposals must describe available and recommended products specific to customer groups and their associated costs, including the rationale behind selection of proposed measure mix, specifically for the following customer categories:

- a. Energy Savings Kits and products for low-income households
- b. Products for renters of both single family and multifamily properties
- c. Products for rental property owners of single family and multifamily properties, including those privately owned as well as large-scale properties owned and operated by Affordable Housing entities
- d. Energy Savings Kits and products for first-time homebuyers

2. Shipment of Efficiency Measures: Contractor shall manage shipment of orders to approved customers who place orders through the website portals. All orders shall be shipped within five (5) business days from the date the order was placed with Contractor.

The cost of shipping the orders will be determined by a fixed fee; Vendors' must include their proposed fixed shipping fee in the Budget they submit with their proposal.

3. Monthly Reporting: Contractor shall provide a monthly report in writing and submitted via email to VEIC's Program Manager and any additional designated VEIC staff, no later than the fourth (4) business day of the month. The Monthly Distribution Report shall include, at minimum:

- a. Customer name
- b. Customer utility
- c. Customer utility account number
- d. Customer shipping address
- e. Energy Savings Kit type ordered
- f. Total order cost
- g. Date order shipped to customer

Contractor shall also attend check-ins with Efficiency Vermont as needed and provide additional reports, as requested, within (2) weeks.

4. Customer Support: Contractor shall maintain a toll-free number to provide customer support for the efficiency measure orders, available during standard business hours. Vendors' proposals should provide details of the inclusive phone-based customer-support services they can provide, including:

- **Multilingual Support**: Offering customer service in multiple languages to cater to a diverse customer base.
- **Accessibility Features**: Providing services for customers with disabilities, such as TTY (Text Telephone) for the hearing impaired.
- **Cultural Sensitivity Training**: Ensuring customer service representatives are trained to handle inquiries with cultural awareness and sensitivity.
- **Extended Hours**: Offering customer service during extended hours, including evenings and weekends.

Ensure Data Security

The Contractor's proposal must include a proposed Data Privacy and Security Policy with clearly delineated processes and procedures for the internal control of sensitive data and processes. The policy should address the following key areas:

- **Data Protection Measures:** Describe the technical and organizational measures implemented to ensure the confidentiality, integrity, and availability of customer data. This includes encryption, access controls, and regular security audits.
- **Compliance with Regulations:** Ensure compliance with relevant data protection regulations such as GDPR, CCPA, etc. The policy should outline how the Contractor will adhere to these regulations and protect customer data accordingly.
- **Incident Response Plan:** Provide a detailed incident response plan that outlines the steps to be taken in the event of a data breach or security incident. This should include procedures for identifying, containing, and mitigating the impact of the breach, as well as notifying affected parties.
- **Data Privacy Impact Assessments (DPIAs):** Conduct regular DPIAs to identify and mitigate privacy risks associated with the processing of customer data. The policy should describe the methodology and frequency of these assessments.
- **Training and Awareness:** Implement a comprehensive training program for employees to ensure they are aware of data privacy and security best practices. This should include regular updates and refresher courses.
- **Third-Party Vendor Management:** Outline the processes for managing third-party vendors who may have access to customer data. This includes conducting due diligence, ensuring contractual obligations for data protection, and monitoring compliance.
- **Monitoring and Auditing:** Establish procedures for continuous monitoring and auditing of data privacy and security practices to ensure ongoing compliance and identify potential vulnerabilities.
- **Data Retention and Disposal:** Define the policies for data retention and secure disposal of customer data. This should include guidelines for how long data will be retained and the methods for securely disposing of data that is no longer needed.
- **Secure Development of Web Applications:** Ensure that web applications are developed following secure coding practices and industry standards such as OWASP. This includes:
 - Implementing secure coding guidelines to prevent common vulnerabilities like SQL injection, cross-site scripting (XSS), and cross-site request forgery (CSRF).
 - Conducting regular security assessments, including static and dynamic code analysis, to identify and remediate vulnerabilities.

- Utilizing secure development frameworks and libraries to enhance security and reduce the risk of vulnerabilities.
- Ensuring that all development staff receive ongoing training in secure coding practices and are aware of the latest security threats and mitigation techniques.
- Integrating security into the software development lifecycle (SDLC) to ensure that security is considered at every stage of development.

Collaboration to Meet Customer Needs

Efficiency Vermont from time to time responds to specific and unique market needs and is seeking vendors who have the ability to collaborate with Efficiency Vermont on co-creating solutions that meet customer needs.

COMMITMENT TO EQUITY & CONSUMER PROTECTION

VEIC is seeking Vendors with a commitment to serving underserved communities, accessibility, and consumer protection. Please describe how your organization manifests these values in your business practices.

Please note specifically if your company provides any of the following services:

- Language interpretation and/or translation services
- Specialized programs or services aimed at serving underserved communities
- Community-based outreach or support
- Both a hard-copy and digital application process
- Business practices that prioritize accessibility
- Wrap-around services including live caller and digital customer support services

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

Responsiveness to the requirements of the RFP	25
Anticipated cost of Program	25
Ability to meet Efficiency Vermont program requirements	40
Commitment to Information Security, Equity and Consumer Protection, particularly language interpretation and/or translation services	10
Total Points Available	100

Response Requirements

- **Company Information:** 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.
- A. **Company profile:** a brief company profile, not exceeding 500 words, including any subcontractors.
- B. **Statement of ownership:** the type of business entity (sole proprietorship, corporation, LLC, or other).
- C. **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 bidder 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.)
- D. **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.**
- E. **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.

- F. 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.

- G. Data Privacy and Security Policy**, as described in the "Ensure Data Security" section of the Required Services above.

- 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 insurance. 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 occurrence/employee
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.

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.