



RFP Release Date: February 8, 2020
Bidder Questions Due: February 15, 2021
Answers Posted: February 19, 2021
Proposals Due: March 1, 2021

Request for Proposal

Marketplace and Marketplace-Transportation Solution

Summary

At VEIC, our priorities are addressing the detrimental impacts of climate change at the individual, business, community, and societal level. VEIC takes a holistic approach to finding energy solutions that create positive change now and in the future. We connect our work to its impacts on the economy, health, and energy justice, because addressing one affects them all.

Through the work we do, we strive to help individuals and businesses make informed energy related purchase decisions and spend less on energy. We're committed to providing our customers with innovative tools and services that help them find, research, and compare available options—and to provide the information through easily accessible means and in easy-to-understand formats.

In 2021, VEIC seeks to implement value-driven programs so our customers identify us as a key resource in a changing energy market. We seek to use information as a way to transform markets and educate consumers on efficient appliances, electronics, lighting, and transportation options.

Responses to this Request for Proposals (RFP) must be delivered electronically to VEIC by 5:00 p.m. p.m. **EDT on Monday, March 1, 2021**. VEIC will not accept responses submitted after 5:00 p.m. EDT. Please submit your response electronically via e-mail to: **Hillary Andrews, handrews@veic.org and Penny Nichols, pnichols@veic.org** with **RFP Submittal for Marketplace Solution** 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 Monday, February 15, 2021 by 5:00 p.m. EDT, and via e-mail only, to handrews@veic.org and



pnichols@veic.org with **RFP Marketplace Solution Question** in the subject line. When appropriate, please refer to the RFP page number and Section Heading for ease of navigation and response. VEIC will post answers on the VEIC website <http://www.veic.org/company/requests-for-proposals> no later than 5:00 p.m. on Friday, February 19, 2021. VEIC will not address questions submitted after Monday, February 15, 2021.

Background

Efficiency Vermont is operated by Vermont Energy Investment Corporation (“VEIC”) as an Energy Efficiency Utility under an Order of Appointment by the Vermont Public Utility Commission. Efficiency Vermont was created in 2000 by the Vermont Legislature and the Vermont Public Utility Commission as a first-of-its-kind, statewide Energy Efficiency Utility, designed to help all Vermonters reduce energy costs, strengthen the economy, and protect Vermont’s environment. Efficiency Vermont serves about 244,000 households.

The DCSEU (DCSEU) offers energy efficiency and renewable energy services to ratepayers throughout DC. This unique program seeks not only to reduce energy, but to create green jobs and support workforce development, plus develop local businesses in the green economy. We align our work with the District’s strong community engagement practices and support the DC Government with its high-performing energy-saving initiatives for the city’s residents, commercial, and institutional buildings. The DCSEU serves an estimated 280,000 households, of which about 60 percent rent their homes.

Since 2011, Efficiency Smart has offered energy efficiency services to more than 60 American Municipal Power, Inc. (AMP) member utilities in Ohio, Michigan, Pennsylvania, and Delaware. AMP is a wholesale power supplier for municipal electric utilities. Efficiency Smart provides technical advice and financial incentives for residential and business customers of participating AMP member utilities. Efficiency Smart serves an estimated 100,000 households.



Project Background

Since 2018, Efficiency Vermont has utilized a marketplace tool to provide Vermont customers with the ability to research and compare energy efficient appliances, electronics, and lighting options. VEIC seeks to continue to utilize a marketplace tool for its Vermont customers beginning April 1, 2021, and possibly expand this offering to include our Efficiency Smart and DCSEU customers in Q4 2021.

Project Objectives

VEIC's goal is to transform markets and ensure qualified, efficient products and transportation options are affordable, accessible, and our customers' products of choice.

Project sponsors seek a Service Provider who can provide an online solution to effectively and correctly analyze the market for all selected products and capture each model's technical specifications, energy consumption, rebates and retail offers, and then present this information within a clean, simple-to-understand online interface.

Our objective is to help our customers easily research and choose to purchase efficient appliances, electronics, lighting, and transportation options—even without financial incentives.

Scope of Work

By submitting a response to this RFP, the Bidder acknowledges understanding and acceptance of this Scope of Work and agrees to fulfill all of its terms in the event of a contract award.

1) Marketplace Tool

The selected Service Provider shall provide and maintain an automated, geo-targeted, custom branded recommendation engine with a clean, simple interface to include:

- a) Product searches (appliances, electronics, lighting, etc.)
- b) Product-specific energy information
- c) Incentive (rebate) details for specific products (if applicable) and link to application or redemption instructions;
- d) Referral to local and online retailers for purchasing products.



- e) At this time, Efficiency Vermont is not looking for a solution that provides online sales of specific products, though this may be of interest in 2022.

2) Reporting

The selected Service Provider shall plan to:

- a) Develop a reporting tool and/or dashboard to be made available to measure program success, including details on key performance indicators, visitors, subscribers and rebate details (as applicable);
- b) Report quarterly to VEIC's subscribed brands (Efficiency Vermont, DCSEU, and Efficiency Smart) on engagement metrics, including average time on site, pages per visit, page views, incoming web traffic sources.

3) Communications

The selected Service Provider shall be responsible for maintaining regular communications with each brand's designated Project Manager and to ensure the program needs are met. The selected Service Provider shall plan to;

- a) Schedule and facilitate meetings and conference calls with brand Project Managers
- b) Update on activities and discuss program priorities and needs
- c) Present and review program statistics or results collected by the Service Provider
- d) Discuss any program implementation, technical, customer, or partner issues, and any other issues that may impact program success;
- e) Discuss status of contract deliverables; and
- f) Convey new program implementation ideas.

4) Transportation Portal (optional)

The selected Service Provider shall create, operate, and manage a geo-targeted, Client-branded transportation platform that supports customers in the consideration phase of electric vehicle purchases in addition to in-home products. Bidders are invited to submit Transportation-Only Portal proposals. Bidders selecting to submit only for the Transportation Portal should specify that as a part of the description of the tool's capabilities or proposed capabilities.

5) Performance

The selected Service Provider shall plan to:

- a) Perform all tasks consistent with each brand's quality assurance and quality control requirements



- b) Facilitate email opt-in; and
- c) Promote existing programs and services.

Performance Period

Work under this RFP will commence immediately upon Contract execution and go through April 1, 2022. VEIC reserves the option to extend the contract past April 1, 2022 and may opt to renew the contract through December 2023 without reissuing an RFP.

Budget Proposal

Proposals should include a volume-based, scalable pricing model inclusive of the services listed in the Scope of Work.

The proposed fee structure must have flexibility to include our Efficiency Vermont customers only, and possibly our Efficiency Smart and the DCSEU customers in the future.

The proposed fee structure shall be inclusive all labor fees, reimbursable costs, and any and all indirect and other costs to be incurred by the Service Provider to complete the scope of work.

Proposals that include a Transportation Portal option must include it as separate pricing model. Bidders are invited to submit Transportation-Only Portal proposals. Bidders selecting to only submit for the Transportation Portal should specify that as a part of the description of the tool's capabilities or proposed capabilities.

Schedule / Milestones

RFP release	February 8, 2021
Bidders Questions Due	February 15, 2021
Answers posted	February 19, 2021
RFP responses due	March 1, 2021
Selection review period ends	March 10, 2021
Selection and contract negotiations	March 17, 2021 to March 31, 2021
Performance period begins	April 1, 2021



Proposal Requirements

Responses to this Request for Proposal must be delivered electronically by 5:00 p.m. EDT on Monday, March 1, 2021. Responses submitted after 5:00 p.m. EDT will not be accepted. Complete responses must be submitted electronically via e-mail to: Hilary Andrews, handrews@veic.org and Penny Nichols at pnichols@veic.org and with **RFP Marketplace Solution** in the subject line. Only complete proposals will be considered.

Responses should be no more than 15 pages in length, be formatted to standard letter paper size (8.5" x 11") with 1-inch margins all around and a common font set to 11-point or larger.

Emailed responses must have all the required information assembled into one (1) PDF file.

Please include the following with your submission and in the following order:

1. A description of firm's experience
2. A complete description of the tool's capabilities or proposed capabilities and how the capabilities address the project objectives
3. A link to the online tool, if available
4. A proposed fee structure for in-home qualified efficient products, electronics, appliances, and lighting; and a separate fee proposal for the transportation portal
5. At least two examples or case studies of similar work your firm has provided to other clients; and
6. At least three (3) references that have used your professional services for a similar project. Include contact name, company, email and phone number.



Evaluation Criteria

Proposals that meet the RFP requirements will be reviewed by VEIC. At VEIC’s discretion, Bidders may be asked to provide clarifications or address specific questions.

Proposals will be evaluated on the following criteria:

- Responsiveness to RFP 30
- Capabilities of the Marketplace tool or proposed tool 30
- Proposed Fee Structure 30
- Experience in type of work 10
- Total points available (100)**

VEIC reserves the right to evaluate proposals on criteria not listed above.

Limitation

This RFP does not commit VEIC to award a contract or to pay any costs incurred in the preparation or submission of proposals. VEIC 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 VEIC in its sole discretion to be in VEIC’s best interest.

Contracts

The selected Service Provider will be provided with up to three contracts (Efficiency Vermont, Efficiency Smart, and the DCSEU) and with the scope of work to be consistent across all contracts.

Insurance Requirements

Before commencing work, the selected Service Provider shall provide Certificates of Insurance to show that the following minimum coverages are in effect. Additional insurance may be required. Where applicable the Certificates of Insurance shall name VEIC as an Additionally Insured party. All policies shall be non-cancelable without 30 days’ prior written notice from the insurance carrier to VEIC. It is the responsibility of



the Contractor to maintain current Certificates of Insurance on file with VEIC throughout the term of this Contract.

Workers' Compensation: With respect to all operations performed under this Contract, the Contractor shall carry, if applicable, workers' compensation insurance in accordance with the laws of the State and any other state in which it is performing the Contract Scope of Work.

General Liability and Property Insurance: With respect to all operations performed under this Contract, the Contractor shall carry general liability insurance having all major divisions of coverage including, but not limited to:

- Premises – Operations
- Independent Contractors' Protective
- Products and Completed Operations (where appropriate)
- Personal Injury Liability
- Contractual Liability

The policy shall be on an occurrence form and limits shall not be less than:

- \$1,000,000 per Occurrence
- \$1,000,000 General Aggregate
- \$1,000,000 Products / Completed Products Aggregate (where appropriate)
- \$50,000 Fire Legal Liability

Automotive Liability: The Contractor shall carry automotive liability insurance covering all motor vehicles, no matter the ownership status, used in connection with this Contract. Limits of coverage shall not be less the amount required by any applicable state law.

Example of additional insurance that may be required.

Employee Dishonesty: The *Subcontractor* and its subcontractor(s) shall carry employee dishonesty insurance covering all its employees that provide any services under the *Subcontract Scope of Work*. Limits of coverage shall not be less than \$500,000 and shall contain "client coverage."



Vermont Energy Investment Corporation

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 and 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). veic.org.