

Request for Proposal

Advanced Residential Integrated Efficiency Services
(ARIES) Contractor RFP

RFP Release Date: 11/21/2018
Bidder Questions Due: 11/30/2018
Answers Posted: 12/7/2018
Proposals Due: 12/14/2018
**Proposal Due Date Extension:
12/21/2018 @ 11:59 a.m.**

Summary

Efficiency Vermont seeks qualified electrical contractors to install home energy monitors in homes throughout the state of Vermont. Efficiency Vermont's ARIES program will provide incentives for home energy monitors and their installation to customers that opt-in to the program and meet eligibility requirements. Learning from a study conducted in 2018, Efficiency Vermont is implementing a full-scale program serving approximately 1,200 households in 2019.

Responses to this Request for Proposals (RFP) must be delivered electronically to VEIC **by 11:59 a.m. Eastern on Friday, December 21, 2018**. VEIC will not accept responses submitted after **11:59 a.m. Eastern**. Please submit your response electronically via e-mail to: jlenihan@efficiencyvermont.com with **RFP Submittal for _____** 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 **11:59 p.m. Eastern Friday, November 30, 2018**, via e-mail only, to jlenihan@efficiencyvermont.com with **ARIES RFP 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. Eastern, Friday, December 7, 2018**. VEIC will not address questions submitted after **November 30, 2018**.

Program Overview

Efficiency Vermont seeks to provide energy savings, affect base load reduction, lower operating costs, and save customers money. These efforts aim towards a supportive path to more efficiency energy use that use behavioral design best practices to nudge and provide feedback to support customers through effective engagement in software applications, communication channels (e.g. e-mails, surveys) and training.

Participating electricians will be installing home energy monitors in Vermont homes. The program goal is to install approximately 1,200 units. We anticipate that multiple contractors will be needed to meet this goal, and thus expect to have multiple contractors participating. Installers will be expected to schedule, install and inform Efficiency Vermont of work progress in a timely manner while maintaining high levels of customer satisfaction, adhering to customer confidentiality guidelines, and a standard of conduct and ethics. Efficiency Vermont will compensate contractors when invoiced after verifying installation.

Scope of Work

The Scope of Work (SOW) describes the work required to complete work for participating contractors. It is a formal document and will be agreed upon by the winning bidder(s) and Vermont Energy Investment Corporation (VEIC). By submitting a response to this RFP, the Bidder acknowledges understanding and acceptance of this Scope of Work and agrees to fulfill all its terms in the event of a contract award.

General Statement of Work

Participating electricians will be installing home energy monitors in Vermont homes for the purpose of providing contextual energy information to customers in order to achieve behavioral energy savings. The program goal is to install approximately 1,200 units, supporting associated energy savings goals. Contractors will define their level of program participation and are not required to install ALL the home energy monitors supporting Efficiency Vermont's program goals. Contractors will be expected to define their service area by town/county in the State of Vermont. Contractors will be expected to schedule, install and inform Efficiency Vermont of work progress in a timely manner while maintaining high levels of customer satisfaction, adhering to customer confidentiality guidelines, and a standard of conduct and ethics. Efficiency Vermont will compensate contractors when invoiced after verifying installation.

Efficiency Vermont will be marketing the program and identifying customers to participate. We will sign-up customers and pair them with contractors by service area where possible. Contractors may also refer their existing customers to the program. Provided customers meet eligibility requirements, the contractor-referred customers will be enrolled in the program, and paired with the referring contractor.

The Contractor will perform all of the services described in this Scope of Work and provide all the deliverables specified below. The Contractor will manage the services listed in Task Sections 1,2, and 3, and provide reports and invoicing in fulfillment of Task Sections 4.

Performance Period and Location

The Efficiency Vermont program is expected to run from January 1, 2019 through December 31, 2019. Contractors will perform installations in this performance period. Contractors are expected to perform scheduling, reporting and other administrative functions from their place of business. Installations will be performed on-site at participating residences with the Efficiency Vermont service area.

Tasks

The tasks associated with the ARIES program for qualified electrical contractors are detailed here. These tasks are indicative of the work within the scope of work for the program, but do not limit the participating contractor(s) from performing additional services to participating customers

provided the additional services provide customer value in accordance with contractor and Efficiency Vermont goals.

Task 1. Training and Certification

The Contractor will provide, at a minimum:

- A. Proof of Master Electricians License.
- B. Adhere to Insurance Requirements outlined in the [Other Information](#) section of this Scope of Work.
- C. Adhere to Confidentiality guidelines and Non-Disclosure Agreements standard with VEIC contracts.
- D. Receive Installer Training in performance period to ensure that latest and greatest techniques for home energy monitor installation are utilized.
 - a. Training will also include customer service requirements, reporting and invoicing requirements, as well as customer participation overviews.

Task 2. Program Administration & Customer Service

Contractor will adhere to program administrative and customer service guidelines for the ARIES program as follows:

- A. Define Service Area in writing. The service area defines the “In-Service Area Rate” for installations. Customers residing in Contractor’s service area will be paired to contractors to maximize program efficiency. Contractors may also perform installations at an “Out-of-Service Area Rate”.
 - a. Service rates to be agreed upon in contract.
- B. Define level of participation outlining the number of installations contractor would like to perform both in-service area, and out-of-service area.
- C. Provide Efficiency Vermont with contractor organization’s active email address and phone number.
 - a. Email address will be method of communication to manage paired customers through the ARIES Site Form. Site form will include:
 - i. Contractor Name
 - ii. Customer Name
 - iii. Installation Address
 - iv. Customer Phone Number
 - v. Customer Email Address
 - vi. Service Area Designation
 - vii. Customer Status
 - viii. Installation Date
 - ix. Monitor Serial #
 - x. Invoice Date
 - xi. Contractor Comments

- b. Contractor will complete their section of the site form and send to Efficiency Vermont to provide status of customer participation on monthly basis.
- D. Confirm with Efficiency Vermont the status of each referred eligible customer, including whether a monitor was successfully installed or, if not, the reason installation did not occur
- E. Contractor will, upon receipt of customer pairing notification, schedule installation with customer within 10 business days.
- F. Respond to requests from Efficiency Vermont staff in a timely manner (within 4 business days)
- G. Participating Contractor Conduct and Ethics
 - a. Participating Contractor shall treat customers fairly and professionally and deliver promised services in a timely, ethical, and responsible manner.
 - b. Participating Contractor agrees to adhere to all applicable federal, state, and local building, energy and fire safety codes.
 - c. If Participating Contractor becomes involved in a dispute with a customer over business practices related to the Study, the contractor shall work to resolve the dispute amicably. If Participating Contractor and customer are unable to resolve the dispute, either party may request assistance from Efficiency Vermont to reach a mutually satisfactory resolution.
 - d. Participating Contractor and Efficiency Vermont staff will maintain a working relationship of mutual respect while striving to provide excellent customer service during the Study.
 - e. Participating Contractor shall maintain the confidentiality of all information that is customer-specific or could otherwise provide an unfair competitive advantage to an entity performing services outside of Efficiency Vermont's programs, in accordance with the Confidentiality Non-Disclosure Agreement.
 - f. Perform all tasks consistent with and subject to Efficiency Vermont quality assurance and quality control requirements.

Task 3. Installation

Contractor will provide the following services pursuant to installation of home energy monitors:

- A. Determine that the electrical system is safe
- B. Install will follow all local electrical regulations
- C. Installer will provide local troubleshooting and support for the installation of the monitors until the install is complete
- D. Provide compatible 240 breaker for customer service panel
- E. Perform steps (provided in training) to install home energy monitor for each eligible customer in agreed upon timeline
- F. Ensure successful completion of install using verification provided by monitor. Successful install = functioning and actively logging and reporting data, pursuant to successful tests as outlined in the installation guide.

- G. Support home energy monitor installation work by contractor, or for installations performed by other contractors.
- H. Answer customer questions related to installation and/or direct customer to Efficiency Vermont program management team or Customer Support.

Task 4. Reporting & Invoicing

Efficiency Vermont requires contractor to provide status reports on customers, and monthly invoicing to maintain the ARIES program. The Contractor will report monthly to Efficiency Vermont the following information:

- A. Provide Efficiency Vermont with a completed Vendor Intake Form and W-9 form for processing payments for services provided.
- B. Provide Efficiency Vermont an availability update, to inform the ARIES program team of contractor's ability to take on additional program work.
- C. Provide a monthly status report of customer status utilizing the contractor site form.
- D. Send invoice for completed work within 7 calendar days after the close of each month.
 - a. Invoice must have customer address and monitor serial # noted for each install.
 - b. Contractor site form must accompany contractor invoice.

Schedule / Milestones

The below table outlines the project milestones. This includes the ongoing work of scheduling and performing installations within 30 days of customer pairing (exceptions to timeline – customer and contractor mutual agreement to be provided to Efficiency Vermont in writing via site form).

RFP release	11/21/2018
Bidders Questions Due	11/30/2018
Answers posted	12/7/2018
RFP responses due to Efficiency Vermont	12/21/2018
Selection review period ends	1/4/2019
Selection and contract negotiations complete	1/18/2019
Performance period begins	1/18/2019
Schedule and install units as assigned:	Ongoing
Jan - Monthly Invoice and Status Reports	2/7/2019
Feb - Monthly Invoice and Status Reports	3/7/2019
Mar - Monthly Invoice and Status Reports	4/5/2019
Apr - Monthly Invoice and Status Reports	5/7/2019
May - Monthly Invoice and Status Reports	6/7/2019
Jun - Monthly Invoice and Status Reports	7/5/2019
Jul - Monthly Invoice and Status Reports	8/7/2019
Aug - Monthly Invoice and Status Reports	9/6/2019

Sep - Monthly Invoice and Status Reports	10/7/2019
Oct - Monthly Invoice and Status Reports	11/7/2019
Nov - Monthly Invoice and Status Reports	12/6/2019
Dec - Monthly Invoice and Status Reports	1/7/2019
Final reporting	1/7/2019
Project close-out	1/14/2020

Proposal Requirements

Contractor proposals shall be sent via email to Jason Lenihan directly (jlenihan@efficiencyvermont.com) Proposal shall be submitted in Microsoft Word (or compatible format), and must contain [a Letter of Commitment](#), [Narrative Proposal](#), [Experience and Qualifications](#), and [Budget](#):

- Letter of Commitment

Not to exceed 1 page. The letter should outline the contractor’s desire and ability perform the scope of work. This can include a statement of your interest in the program and energy efficiency work.
- Narrative Proposal

This should include a description of the approach for each task outlined in the scope of work, including the timetable for each task. (Contractor may copy [Tasks 1-4](#) from the [General Statement of Work](#).)
- Experience and Qualifications

As you will be required to send in a copy of a Master Electricians license, this section can be used to discuss any similar project work conducted by your organization, or other certifications and memberships that may be applicable. Please also provide a list of key personnel—those that would be performing, the administration, reporting and invoicing tasks defined in the statement of work.

Include references to Workforce Development, where task assignments include members of your organizations that will gain workforce experience resulting from your organization’s participation in the ARIES program.

Budget

Efficiency Vermont is looking for a per-installation cost. It is expected that the contractor will schedule the installations with customers after Efficiency Vermont pairs the contractors and customers. Contractors will also provide a 240 breaker to adhere installation guidelines. If there are Other Fees, not included in the per-installation costs, the contractor should include them in the table below with a definition of those fees.

	Number of Installs Desired	Estimated Budget
a. In-Service Area Rate		
b. Out-Of-Service Area Rate		
Total Installs (a. + b.)		
Other Fees*		

*Definition of "Other Fees" -

Evaluation Criteria

The contractor proposals will be evaluated by the Efficiency Vermont evaluation team, which consists of the members of the Program Team and the Account Manager assigned to the electrical contractor trade ally group. The evaluation team will score the proposals based upon the following requirements:

- | | |
|--|--------------|
| • Responsiveness to RFP | 25 |
| • Responses to Tasks in Narrative Proposal | 25 |
| • Experience and Qualifications | 20 |
| ○ Workforce Development/Experience | 5 |
| • Budget | 20 |
| • Contract Compliance | 5 |
| Total points available | (100) |

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.

Insurance Requirements

Before commencing work, the Contractor shall provide Certificates of Insurance to show that the following minimum coverages are in effect. 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.

CERTIFICATE OF AGREEMENT AND COMPLIANCE

This form must be completed in its entirety and submitted along with the Bidder's response to the RFP.

CONTRACT TERMS (please check appropriate box below):

The undersigned hereby acknowledges and agrees to the language and attachments of the VEIC Contract template as part of this RFP

OR

The undersigned identifies areas of conflict with the standard contract as presented and has provided a list of exceptions taken, each referenced by section and page number of the standard contract, as part of their response.

INSURANCE: Bidder certifies that the company / individual is in compliance with, or is prepared to comply with, the insurance requirements as detailed in this RFP and the standard contract. Certificates of Insurance must be provided prior to issuance of a contract.

Company Name: _____

Mailing Address: _____

City, State, ZIP Code: _____

Email address: _____

Signature of Authorized Representative

Print Name

Title

Date

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 320 professionals and is headquartered in Burlington, Vermont. It has offices also in Washington, DC, New Jersey and Ohio.

VEIC gained national prominence as the contractor for the nation's first statewide energy efficiency utility, Efficiency Vermont. The company also designed and operates utility scale contracts for energy efficiency service delivery with municipal utilities in the Midwest (American Municipal Power), known as Efficiency Smart, and with the District of Columbia, known as the DC Sustainable Energy Utility (DCSEU). The majority of the staff works for these VEIC divisions. For additional information, please see: VEIC Website: 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