



## Request for Proposal

**2020 Lighting Initiative to Provide Screw-based ENERGY STAR® LEDs to Income-Eligible Customers**

**RFP Release Date: 11/19/2019**  
**Bidder Questions Due: 11/21/19**  
**Answers Posted: 11/22/19**  
**Proposals Due: 12/3/19**

### Summary

Efficiency Vermont requests proposals from companies who can:

- Create an online webpage for income-eligible customers to order no-cost screw-based Energy Star®-certified light-emitting diode (LED) lighting products and self-screen for income eligibility. Work with Efficiency Vermont to create a list of screw-based LEDs that represent the most frequently used types for residential applications to assist customers with selection.
- Compile and ship the orders directly to the customer, add Efficiency Vermont branding, and ensure customers receive orders within a reasonable amount of time. Regularly bill Efficiency Vermont for the cost of the products and shipping fees.

This initiative will contribute to Efficiency Vermont’s goal of reducing energy usage and costs for all Vermonters, particularly those who are burdened the most by their electric bill.

Responses to this Request for Proposals (RFP) must be delivered electronically to VEIC by **5:00 p.m. EST on Tuesday, December 3, 2019**. VEIC will not accept responses submitted after **5:00 p.m. EST**. Please submit your response electronically via e-mail to: [ecleere@veic.org](mailto:ecleere@veic.org) with **RFP Submittal for 2020 Income-Eligible Lighting Initiative** 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 **5:00 p.m. EST Thursday, November 21 2019**, via e-mail only, to [ecleere@veic.org](mailto:ecleere@veic.org) with **2020 Income-Eligible Lighting Initiative 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 <http://www.veic.org/company/requests-for-proposals> no later than **5:00 p.m. EST, Friday, November 22, 2019**. VEIC will not address questions submitted *after 5:00 p.m. EST, Thursday, November 21, 2019*

### RFP Schedule / Milestones

RFP Release	Tuesday, November 19, 2019
Bidders Questions Due	Thursday, November 21, 2019 - 5:00 p.m. EST
Answers Posted	Friday, November 22, 2019 - 5:00 p.m. EST
RFP Responses Due to Efficiency Vermont	Tuesday, December 3, 2019- 5:00 p.m. EST
Selection Review Period Ends	Friday, December 6, 2019
Notification of Proposal Selection	Monday, December 9, 2019
Contract Negotiations & Signatures	December 9, 2019 – December 20, 2019
Performance Period Begins	December 23, 2019
Performance Period Ends	December 31, 2020

## Program Overview

The goal of Efficiency Vermont's 2020 Lighting Initiative to Provide Screw-based ENERGY STAR LEDs to Income-Eligible Customers is to ensure this customer segment has access to high-quality, energy-efficient LEDs, and can easily select & obtain the products they need. Efficiency Vermont will fund both the cost of the bulbs and the shipping fees. Our ideal partner will propose a short-list of ENERGY STAR-certified screw-based LEDs and must be able to ship directly to customers, as well as provide support if a customer runs into issues when trying to order online.

## Scope of Work

After notification of proposal selection, the company will be responsible for working with Efficiency Vermont to determine product list, website details, reasonable shipping times and the inclusion of Efficiency Vermont-branding materials. During the offer period, the company will be responsible for shipping no-cost LEDs to eligible customers within the established turn-around time, and subsequently billing Efficiency Vermont for the cost of the products and shipping fees with proof of shipment.

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

Efficiency Vermont's Lighting Initiative to Provide Screw-based ENERGY STAR LEDs to Income-Eligible Customers shall include the following tasks:

### **Task 1: Create a customer-friendly website that includes an abbreviated list of qualified products which represent the most commonly-used lighting types in residential homes**

The company will create an Americans with Disabilities Act (ADA)-compliant website where customers can self-screen for income eligibility, certify the information provided is true and accurate to the best of their knowledge, and select a limited quantity of screw-based LEDs to be shipped to their address.

To mitigate decision paralysis among customers, the website created by the company will show the list of qualified products and provide a means for customers to evaluate, based on the end-use of the item, which lighting products would be most appropriate to order. To this end, the company will create a "short-list" of screw-based LEDs that are most frequently used for different applications (i.e. kitchen lighting, bathroom lighting, etc.). It is desired that this information be displayed pictorially and provide the customer with **brief** information about the product they're selecting so they can make informed choices.

The company must be able to provide a high level of support to customers for product orders and timely shipments including being able to respond to inquiries about any website malfunctions within a reasonable timeframe. The website should contain features that make it obvious to customers where they can receive support and how they may order LED bulbs by calling Efficiency Vermont Customer Support\*\* if they are not comfortable or able to use the online website developed by the company.

\*\*If the company can provide customer income-screening support (i.e. walking customers through self-screening pages over the phone) *in addition to* support for website issues, please note that in the proposal. If you can also provide other ordering options (e.g. paper order form), please note that as well.

To ensure the security of customer information collected on the order website, the company will review the included document: Vendor Information Security Requirements. The company's proposal should include measures in-place and/or that will be taken to maintain confidentiality and security of the information provided by customers, and indicate any exceptions to the security requirements listed. Proposals that do not list any exceptions to the security requirements will be deemed as able to comply with all requirements, and will become part of any resulting agreement.

All products available to be selected under the initiative must be ENERGY STAR certified screw-based LED lamp products and must be listed at <http://www.energystar.gov/products> to be included in the promotion. Products must be ENERGY STAR certified as of the start date of the proposed promotion. For products included in the promotion, Efficiency Vermont must receive written notice of any products delisted from the ENERGY STAR qualified products list within 30 days of notification from the EPA.

The company will provide the model number (as listed by ENERGY STAR) of each product on the short list to Efficiency Vermont. Efficiency Vermont reserves the right to exclude some ENERGY STAR-certified products from this promotion for any reason including results of independent, third-party testing. Partners may propose replacement products; however, Efficiency Vermont is under no obligation to accept them.

**Task 2: Compile and ship orders, and regularly bill Efficiency Vermont for product and shipping costs**

The company will take information received from the website and compile and ship the orders to the customers within a reasonable timeframe (ideally, within 5-7 business days of receiving the order), providing that the customer meets the income-eligibility guidelines and has filled out all appropriate sections of the website pertaining to screening. The company will work with Efficiency Vermont to create a process for co-branding the lighting products before they are shipped directly to the customers.

The company will ship the lighting products to the customers, as requested, in a reasonable timeframe. The company will keep track of all relevant order and shipping information.

The company will collect the information from the eligibility screening and order form on the website, which will include, but not be limited to:

- Certification of income level
- Name
- Shipping address
- Installation address (if different than shipping address)
- Shipping cost
- Product type
- Quantity of each type ordered
- LED lighting product cost per unit

The company will work with Efficiency Vermont to report the information collected in a template that's mutually agreed upon and will be submitted on a regular basis. The company will submit invoices to Efficiency Vermont for the costs of shipping and products on a regular basis.

## Proposal Requirements

All proposals must contain the following numbered sections. Please follow this numbering protocol precisely and do not re-number, insert numbers, or otherwise modify the sequence. Responses that do not follow this numbering protocol will not be considered.

**Section 1:** Basic information about the bidding organization, including a brief description of the bidding organization's structure and capabilities.

**Section 2:** Proposed product offering specifics, including ENERGY STAR V2.0 LED model numbers, product specifications, and pricing (for each product as well as shipping fees). Proposed strategy to co-brand products to be shipped to customers should be explained.

**Section 3:** Proposed methodology for creating online website and suggestions for best serving ease of ordering for customer for the following website components:

- Customers entering personal information & securely holding that information
- Screening pages for customers to self-screen and verify their income eligibility
- Proposed product shipping timeline
- Customer support available

**Section 4:** Samples of past work that would align with the program and initiative's objectives as outlined in this RFP which may include, but not be limited to, similarly created webpages, or shipping/receiving reports (with the desired details of model number and quantity shipped to each customer on shipping/receiving reports).

**Section 5:** A detailed fee proposal and budget breakdown by labor task, and anticipated hard costs

**Section 6:** A list of three (3) references, naming clients for whom your organization has provided services. Provide a contact name, address, email address, and a contact phone number for each reference.

Responses must:

- Be no more than 12 pages in length
- Be formatted to standard letter paper size (8.5" by 11") with 1-inch margins and a common font set to 11-point or larger
- Contain a cover letter with the primary person's contact information
- Be assembled into one (1) PDF file. ***VEIC will not accept proposals containing multiple files and/or file formats.***

## Evaluation Criteria

Selection and funding of any submitted proposal will be based on:

• Website design (simple, easy for customers to use, etc.)	30 points
• Supportive Activities (customer support, multiple order options, etc.)	20 points
• Plan to meet VEIC's Information Security Requirements	15 points
• Product Price	15 points
• Product Packaging (co-branding, marketing materials, educational)	10 points
• <u>Responsiveness to RFP (concise, detailed plan, quick turn-around, etc.)</u>	<u>10 points</u>
<b>Total Points Available</b>	<b>(100 points)</b>

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

Efficiency Vermont reserves the right to reject any proposal or to negotiate the specifics of any submitted proposal, including funding and per-product incentive levels. Incentive funds will be available only upon written confirmation from Efficiency Vermont. Actual incentive funds for approved promotions will be detailed within the resulting Agreement with Efficiency Vermont. Efficiency Vermont will monitor promotion performance and reserve the right to subsequently reallocate, reduce, deny, or require reimbursement of funding for promotions that are not in compliance. Efficiency Vermont reserves the right 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.

### **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.

## **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](http://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](http://www.encyvermont.com)