



Notice Type: Request for Proposal

Short Title: **Efficiency Vermont Residential & Business Customer Satisfaction surveys**

Posted date: March 18, 2019

Questions due: March 27, 2019

Answers Posted: March 29, 2019

Proposals due: April 14, 2019

Decision: April 19, 2019

Project Kick-off: Week of May 6, 2019

Introduction

VEIC (Vermont Energy Investment Corporation), a nonprofit organization, requests proposals for **Efficiency Vermont Residential & Business Customer Satisfaction surveys**.

Responses to this RFP must be delivered electronically to VEIC by 5:00 p.m. EST on Sunday, April 14, 2019. Responses submitted after 5:00 p.m. EST will not be accepted. Responses must be submitted electronically via e-mail to: nneverisky@veic.org with ***RFP Submittal EVT Residential & Business Customer Satisfaction surveys*** in the subject line.

1. For efficiency of review, VEIC has specified a numbering protocol for the order in which the Response Requirements are to be presented. Please follow this numbering protocol and do not re-number, insert numbers, or otherwise modify the sequence. Responses that do not follow this numbering protocol will not be considered.
2. When responding via e-mail, all of the documents for the submittal must be presented in the same order as the numbered requirements below. All submissions should consist of one (1) PDF document containing all of the requested information.

Questions regarding requirements and scope of work will be received up to 5 p.m. EST on Wednesday, March 27, 2019 via email only at nneverisky@veic.org and answers will be posted on the VEIC website (www.veic.org) no later than 2 p.m. EST on Friday, March 29, 2019. Questions submitted after March 27, 2019 will not be responded to.

Background on VEIC

VEIC is a sustainable energy company with a mission to enhance the economic, environmental, and societal benefits of clean and efficient energy use for all people. We have over 32 years' experience transforming energy systems, specializing in energy efficiency, clean transportation, and renewable energy. Our full-service consulting business offers proven solutions for a changing energy landscape.

VEIC works with outstanding partners who have selected us to bring their brands to life. We operate three large-scale energy efficiency utilities: Efficiency Vermont, Efficiency Smart, and the DC Sustainable Energy Utility (DCSEU); and have two mission-aligned subsidiaries that promote community-level solutions for reducing greenhouse gas emissions: Commons Energy



and Sun Shares LLC. VEIC also operates the Biomass Energy Resource Center and administers two collaborative ventures: The Renewable Energy Resource Center and Drive Electric Vermont.

VEIC employs over 250 professionals and is headquartered in Burlington, Vermont, with offices in Washington D.C., Ohio, New York, and Wisconsin.

For additional information, please visit www.veic.org.

Background on Efficiency Vermont

Efficiency Vermont was created by the Vermont Legislature and is regulated by the Vermont Public Utility Commission to help all Vermonters reduce energy costs, strengthen the economy, and protect Vermont's environment.

For additional information, please visit www.encyvermont.com.

Project Overview

Efficiency Vermont conducts online surveys with business and residential customers to measure satisfaction and other performance metrics as mandated by the state. These performance metrics, known as Service Quality and Reliability Plans (SQRPs), are a standardized set of measures that all Vermont utilities monitor and report to the Vermont Public Service Board.

SQRP surveys are distributed electronically to Efficiency Vermont residential and business customers within 24 hours of engaging with an Efficiency Vermont customer service team member via phone, email or live chat.

Efficiency Vermont is seeking a research vendor to review and - if necessary to satisfy evaluation criteria, edit - the existing survey instrument, track responses to ensure ongoing data collection, provide raw data on a monthly basis, analyze final results, and report out on the results of these online SQRP surveys to Efficiency Vermont and the Vermont Public Service Board in November 2020.

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.

This request for proposal is for residential and business SQRP customer surveys. The primary objectives of this Scope of Work are:

1. Fulfill SQRP criteria by gauging the satisfaction level of residential and business customers who have contacted Efficiency Vermont via telephone, email, and/or online chat.



2. Identify how Efficiency Vermont may improve its customer support to business and residential customers.

To fulfill these objectives, the contractor must:

1. Review the existing survey invitation and instrument to recommend changes that could A) potentially maximize the response rate and B) improve collection of data with which to gain insight into opportunities for improved customer service.
2. Collaborate with VEIC to ensure that the survey design meets SQRP fielding requirements. This may include up to two rounds of revisions.
3. Provide a raw data file in an Excel spreadsheet to VEIC by the 5th business day of each month. This file should contain raw survey data from the prior month, as well as year to date. VEIC will provide the vendor with a Qualtrics log in for this purpose.
4. Monitor raw data on a monthly basis to ensure ongoing collection of survey responses and to identify emergent barriers to satisfactory data collection.
5. Analyze all of the raw data and prepare a final results presentation in PowerPoint outlining the key findings of the survey, including overall metrics and metrics by customer type (residential and commercial).
6. Over the course of the project, present the survey results over the phone to VEIC / Efficiency Vermont staff up to two times, and in-person one time in November 2020. The in-person presentation will either occur in VEIC's office located in Burlington, Vermont or at the Public Service Department in Montpelier, Vermont. VEIC / Efficiency Vermont staff may, based on the phone presentation, request revisions be made prior to the final in-person presentation.

To successfully provide these services, the selected contractor must also coordinate project management activities. This includes working with Efficiency Vermont staff to establish a project plan outlining timelines and milestones. The selected contractor will be expected to manage all work to meet these deadlines.

Efficiency Vermont will schedule a kick-off meeting with the selected contractor to discuss the project overview and provide strategic documents to the contractor.

Project Deliverables:

Excel files containing all raw data uploaded to a VEIC SharePoint site on a monthly basis by the 5th business day of the month. A PowerPoint presentation containing the final survey results, to be presented in November, 2020.

Performance Period:

Work under this RFP will begin immediately upon contract execution through **December 31, 2020**. Services will be provided on a rolling basis throughout this time period.



Anticipated Schedule / Milestones

- | | |
|--|--|
| • RFP issued | March 18, 2019 |
| • Questions due to VEIC | March 27, 2019 |
| • Answers to questions posted to VEIC website | March 29, 2019 |
| • Proposals due to VEIC | April 14, 2019 |
| • Selection of service provider | April 19, 2019 |
| • Estimated project kick-off | May 6, 2019 |
| • Email secure raw data file to Efficiency Vermont | 5 th business day of each month |
| • Present survey results to Efficiency Vermont | November 2020, specific date TBD |

Proposal Requirements

Responses to this RFP must be delivered electronically to VEIC by 5:00 p.m. EST on Sunday, April 14, 2019. Responses submitted after 5:00 p.m. EST will not be accepted. Responses must be submitted electronically via e-mail to: nneverisky@veic.org with ***RFP Submittal for Efficiency Vermont Customer Satisfaction surveys*** in the subject line.

All responses must be no more than ten (10) 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.

All responses must include a cover letter with the primary person's contact information. Email responses must have all the required information assembled into one (1) PDF file. Multiple files and/or file formats will not be accepted.

Please include the following information in your response to this bid request:

1. A brief description of your firm's structure and capabilities.
2. A list of all services provided in-house and services provided by any outside consultants. If any services are provided by outside consultants, please provide a brief description of the firm, its role, and capabilities.
3. A description of what makes your approach/process unique.
4. A description of your firm's experience using Qualtrics.
5. Bios and resumes of your project team, including consultants. This should include specific experiences that each member could contribute to the project.
6. Examples or case studies of similar work your firm provided to other clients.
7. A detailed fee proposal and budget breakdown showing the allocation of funds.
8. At least three (3) references that have used your professional services for a similar project. Include contact name, address and a contact phone number.
9. A signed copy of the Contractor Certificate of Compliance document.



Budget

The total budget for this Scope of Work shall not exceed \$25,000. The budget shall include all labor fees, reimbursable costs, and any and all indirect and other costs to be incurred by Service Provider to complete the Scope of Work. Proposals must include all expenses to be incurred by direct staff and any subcontractors.

Evaluation Criteria

Proposal selection will be qualifications-based. Proposals will be evaluated based on the written submission and the following criteria:

- Demonstrated experience leading online survey projects (40%)
- Cost effectiveness (30%)
- Vermont-based contractor (30%)

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

Contract Information

VEIC may award contracts to one or more firms. It may award a contract based solely on the response to this RFP Request, or it may award a contract following discussion or negotiations with one or more responders. VEIC may request additional data or material prior to making a contract award. VEIC will intend to negotiate contract terms with the most qualified contractor. If unsuccessful, VEIC would intend to then negotiate with the next most qualified contractor, until reaching satisfactory contractual arrangements.

Service Providers awarded the project are required to become either a contractor or Subcontractor. All Contractors and Subcontractors are required to obtain and provide proof of General Liability, Workers' Compensation and Auto insurance as listed in the VEIC Contract Template.

Insurance Requirements

Before commencing work, the Contractor shall provide Certificates of Insurance to show that the minimum coverages are in effect as listed in the VEIC contract template. Where applicable the Certificates of Insurance shall name VEIC as additionally insured party as its interests may appear. All policies shall be non-cancellable 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 through the term of this Contract.

Workers' Compensation: With respect to all operations performed under this Contract, the Contractor shall carry 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.

Questions

Questions regarding requirements and scope of work will be received up to 5 p.m. EST on Wednesday, March 27, 2019 via email only at nneverisky@veic.org and answers will be posted on the VEIC website (www.veic.org) no later than 2 p.m. EST on Friday, March 29, 2019. Questions submitted after March 27, 2019 will not be responded to.

Limitation

This Request for Proposal 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 Request, to negotiate with any qualified bidder or to cancel in part or in its entirety the RFP Request, if any of these actions is deemed by VEIC in its sole discretion to be in its best interest.

Notice Type: Request for Proposal

Short Title: **EVT Residential & Business Customer Satisfaction surveys**