

Cape Light Compact Lead Vendor for Residential Home Energy Services

Request for Proposals - Questions and Answers

Set #1 posted on www.capelightcompact.org on 09/03/2015

Questions that have been received are listed and numbered here with italics. Answers are listed and numbered below each question.

Question 1.1: What services are included in the contractor management fee line item? Approximately what percentage of the overall volume is performed by Home Performance Contractors and the LV? Will the LV be responsible for recruiting, on-boarding, training, mentoring, and maintaining Participation Agreements with each contractor? Is there a place for general administrative costs that are not related to contractor management in this pricing structure or should these costs be allocated across the unit prices for the line item fees?

Answer 1.1: Currently, the Cape Light Compact has no active HPCs. As mentioned in Section 6, onboarding is included in the summary of Cape Light Compact responsibilities. The management fee is designed for all management costs that are not directly referenced in Section 11.5 for Pricing.

Question 1.2: Could The Compact provide more detail on the historical volume of customers on Martha's Vineyard? How do we address the additional travel costs associated with serving these customers within the provided pricing structure?

Answer 1.2: The Cape Light Compact includes participation by town on its website by month and year. The reference is available at: <http://www.capelightcompact.org/reports/monthly-energy-efficiency-town-reports/>. The last file (usually December) has the cumulative numbers for the year. In 2014, the participants in Martha's Vineyard accounted for roughly 6.5% of the total participants for Cape Light Compact. No additional travel costs are included in Section 11.5 for Pricing as lead vendor costs should include travel to the Vineyard. Please provide details as appropriate on assumptions.

Question 1.3: Could you clarify the transition responsibilities of the existing LV and new LV assuming there is a transition? Will it be the responsibility of the current LV to finish all outstanding customer projects, or will these projects be taken over by the new LV in-progress?

Answer 1.3: Based on the current Contract between the Compact and its Lead Vendor, work on customer projects ends on December 31, 2015. In the event of a transition, every effort will be made to complete all customer projects by the end of the Contract period, but in the event there is work outstanding at years end, efforts will be made to transfer customer data to complete those projects.

Question 1.4: Is there a limit of the number of high efficiency lighting allowed per customer site and is The Compact moving towards 100% LEDs?

Answer: 1.4: Currently, there is a limit to the number of high efficiency lighting allowed by bulb type by customer account. That limit is defined at a statewide level for all Massachusetts Program Administrators. The Compact is moving toward 100% LEDs where appropriate. In your bid proposal, please provide details regarding your assumptions.

Question 1.5: The pricing sheet does not include a line item for advanced power strip cost or install cost? Should we include this item in our pricing?

Answer: 1.5: This is an oversight in the pricing request. Please provide the price, install fee and total cost installed by advanced power strips.

Question 1.6: Per Exhibit C of the RFP, please provide a copy of The Compact's Requirements for Vendor Employee Background Checks.

Answer: 1.6: Please refer to the document entitled, "Exhibit C," at www.capelightcompact.org/rfp.

Question 1.7: Does The Cape Light Compact envision the LV developing and executing a strategic marketing plan to support program production goals?

Answer: 1.7: For the plan years 2013 through 2015, minimal formal marketing was required for the Compact's HES initiative. In addition, the Compact participates in the statewide efforts with the Home Energy Services group. The Lead Vendor would need to review marketing materials developed by that group. Additionally, the Compact may request that the Lead Vendor staff Compact marketing events, and provide collateral materials (either in hard copy and/or digital form) to best service our customers. In your bid proposal, please provide details regarding your assumptions.

Question 1.8: Under 2.10 Marketing Section, the RFP states "Program marketing will be conducted in order to maximize HES participation." Does this statement require a dedicated marketing budget to be included within the RFP response?

Answer: 1.8: The above referenced statement (i.e. "Program marketing will be conducted in order to maximize HES participation.") refers to the marketing efforts that will be undertaken by the statewide Home Energy Services team as well as Compact specific marketing efforts. In your bid proposal, please provide details regarding your assumptions.

Question 1.9: Page 9: "Coordinate all on-site IIC work crews as applicable." Is the LV directly responsible for the actual scheduling of IIC installation appointments with customers?

Answer: 1.9: The Compact's current vendor offers IICs the option for the lead vendor to schedule the IIC appointments. The majority have accepted this option. Cape Light Compact would like to continue to offer this option. In addition, those IICs that schedule their own appointments as well as those scheduled by the lead vendor all use a central calendar to schedule work. In your bid proposal, please provide details regarding your assumptions.

Question 1.10: Page 10: "...adhere to BPI protocols for H & S issues" Does this refer to the BPI protocols that are currently included in the Mass Save Home Energy Assessment Standards and Material and Insulation Standards, or does this refer to the recently updated BPI protocols?

Answer: 1.10: The program administrators statewide are looking to update the current standards. The combustion safety testing (in Section 2.3 of the Energy Assessment Standards) relies directly upon BPI or equivalent standards. The statewide group works with lead vendors to apply protocols, as appropriate.

Question 1.11: Page 30: Item 13; If the new LV is expected to manage projects over multiple years, would the historical data be available for finishing projects that originated under the prior LV?

Answer: 1.11: Based on the current Contract between the Compact and its Lead Vendor, work on customer projects ends on December 31, 2015. If there is a transition to a new vendor, every effort will be made to complete all customer projects by the end of the Contract period, but in the event there is work outstanding at years end, efforts will be made to transfer customer data to complete those projects.

Question 1.12: Section 11.4 (Data Exchange Overview), page 102: Can The Compact please provide a sample of this data file so we can better understand what is included?

Answer: 1.12: Please see the sample files entitled, "EECP User Guide – Compressed File Enrollment Upload.pdf" and "EECP Compressed Import Specifications 1.7.xlsx" at www.capelightcompact.org/rfp

Question 1.13: Can The Compact provide further details on the customer intake and eligibility screening process, with the roles and responsibilities of The Compact and the LV defined.

Answer: 1.13: Please see the process flow that is posted at the end of these questions.

Question 1.14: Please confirm that the required electronic copy of the proposal should be emailed to The Cape Light Compact.

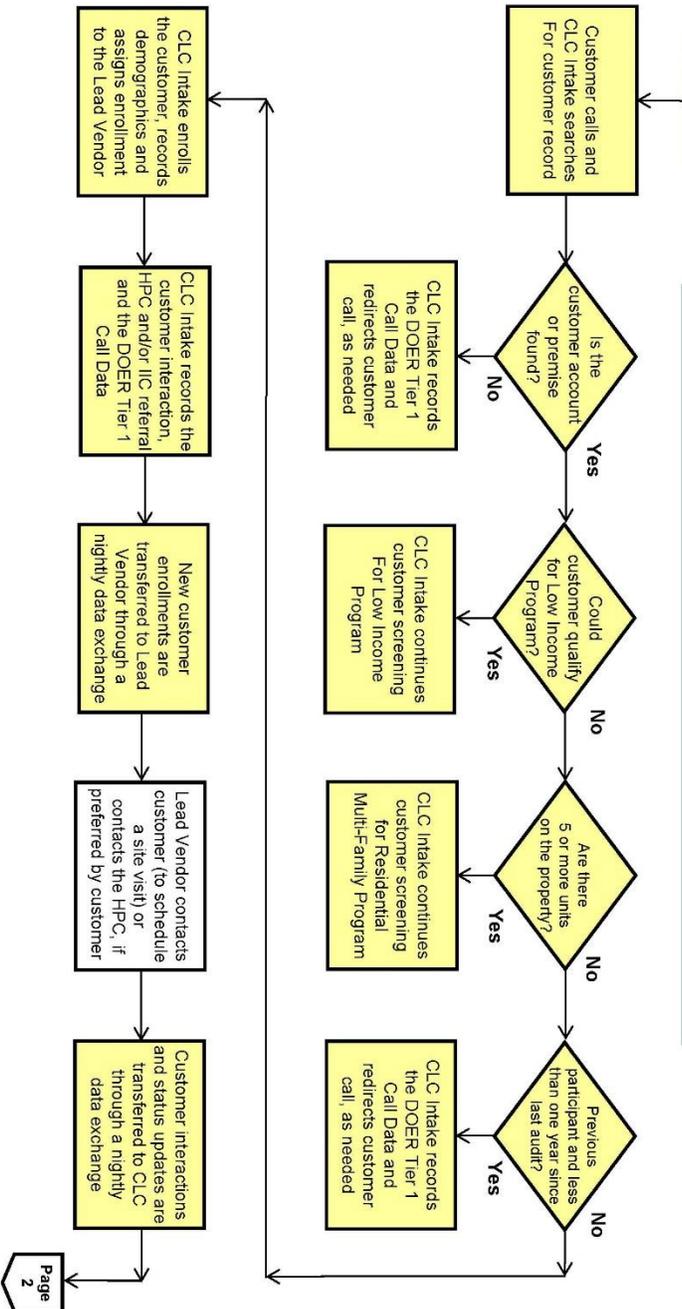
Answer: 1.14: Please submit the electronic copy of the proposal to Margaret Downey at the following email address: mdowney@barnstablecounty.org.

CLC Residential Home Energy Services (1-4 Unit) Process Flow

Version 1.0 - 08/05/15

A customer may qualify for the Low Income Program if they meet one of the following criteria:

- Electric discount rate or fuel assistance, and heats with electric, oil, or propane
- Gas discount rate or fuel assistance, and heats with gas
- Non-gas heat and income eligible



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