



**Vermont
Energy Investment
Corporation**



February 3, 2017

REQUEST FOR PROPOSALS

Vermont Community Energy Partnership Grant Program

Summary

Vermont Energy Investment Corporation d/b/a Efficiency Vermont (hereinafter referred to as Efficiency Vermont) and Burlington Electric Department are soliciting proposals from nonprofit organizations to receive grants that will enable them to help low-income Vermonters reduce their energy bills. Under the Vermont Community Energy Partnership Grant Program, non-profit organizations that have on-going relationships with low-income Vermonters are encouraged to submit applications for projects that will help low-income Vermonters: (1) achieve energy savings through the direct installation of energy efficient products; (2) identify energy-saving opportunities in low-income households; and (3) increase their energy awareness.

Efficiency Vermont and Burlington Electric acknowledge that many non-profit organizations serving low-income Vermonters have little or no experience in helping their constituents save energy and reduce utility bills. To address this challenge, Efficiency Vermont and Burlington Electric will provide grant funds to cover staffing costs and related expenses and extensive training on how to effectively undertake energy work described in this request-for-proposal (RFP).

Efficiency Vermont and Burlington Electric expect to award between 5-10 proposals in the range of \$10,000 - \$30,000 each.

Background

Efficiency Vermont, a statewide energy efficiency utility, and Burlington Electric Department, a municipal/energy efficiency utility serving the City of Burlington, help Vermonters reduce energy costs by making their homes and businesses more energy efficient. Efficiency Vermont and Burlington Electric provide technical assistance and financial incentives to help Vermonters identify and pay for cost-effective projects involving energy-efficient building design, construction, renovation, equipment, lighting, and appliances. Efficiency Vermont and Burlington Electric's energy efficiency programs each operate under orders of appointment by the Vermont Public Service Board.

Efficiency Vermont is administered by the Vermont Energy Investment Corporation (VEIC), an independent nonprofit energy services organization. The Vermont Energy Investment Corporation has designed and implemented energy efficiency programs throughout Vermont and in more than 20 states and eight countries since 1986. For more information on Efficiency

Vermont, see www.encyvermont.com and on the Vermont Energy Investment Corporation, www.veic.org.

Burlington Electric has been delivering energy efficiency services to its customers since 1989. Burlington Electric knows that energy efficiency is pivotal to offering its customers high quality and affordable energy services and a secure, environmentally sound supply of electricity into the future. The overall effect has been dramatic as annual electricity consumption in 2014 was 5.3% lower than in 1989, while saving Burlington consumers more than \$10.1 million of retail electric costs annually. For more information on Burlington Electric, see www.burlingtonelectric.com.

The Community Energy Partnership Grant Program is designed to help reach low-income Vermonters – particularly those who are currently underserved by efficiency programs. It is well understood that low-income households and individuals pay correspondingly more of their household incomes in energy than do middle- and upper-income populations. Because of this high “energy burden,” low-income households are excellent candidates for benefiting from efficiency improvements. A key part of this grant program involves data collection on the number and demographics of low-income Vermonters so that Efficiency Vermont and Burlington Electric can understand how we can better serve these individuals, households, and communities.

There are a number of reasons why customers may not fully avail themselves of energy efficiency services, including the following barriers, among others:

- *Awareness:* Individuals may be unaware about the potential economic and quality-of-life benefits of energy efficiency, what energy efficiency programs are available, what specific efficiency measures they can undertake, and which efficiency programs they may qualify for, such as the Weatherization Assistance Program.
- *Access:* Individuals may face a range of barriers to accessing efficient products, services, and information, including physical, linguistic, time, comprehension, technological, and geographic barriers.
- *Cost:* Some customers cannot afford the upfront costs associated with making efficiency improvements to their homes and other buildings.
- *Pride:* Customers might perceive any offered free or low-cost energy efficiency services to constitute charity. In addition, some customers might be concerned about taking benefits away from others who have a greater need.

One of the most effective means for reaching low-income individuals is through organizations that are trusted by and already providing these individuals with some other type of essential service, connection, or assistance. Vermont is fortunate to have a wide range of organizations, institutions, and agencies that serve low-income individuals, including low-income individuals who are seniors, people with disabilities, immigrants and refugees, people who are housing- or food-insecure, mobile home owners and individuals who have been incarcerated, among others.

Efficiency Vermont and Burlington Electric are interested in working with nonprofit organizations that have ongoing, trusted relationships with low-income Vermonters. These organizations know the challenges their constituencies face and how these challenges relate to their ability to avail themselves of energy efficiency services. Many of these organizations have on-going and direct relationships with their constituents wherein staff or volunteers make home

visits that present an ideal opportunity to share information and provide assistance around energy efficiency.

Through this request for proposals, Efficiency Vermont and Burlington Electric are seeking organizations that work directly with low-income Vermonters by helping them take advantage of energy efficiency products and services, assessing their needs for efficiency services, and providing information about energy efficiency. In particular, Efficiency Vermont and Burlington Electric are interested in:

- Leveraging partnerships wherein organizations are already conducting home visits to provide basic social and/or energy services.
- Building upon existing social service networks and referral programs that connect health, energy, and housing program to optimize low-income services, such as the One-Touch and SASH (Support and Services at Home) programs.
- Helping reduce the energy costs for renters, mobile home owners, and other vulnerable Vermonters that lack access to information and support for saving energy (with high energy burdens).

The principal goals of this program are to:

1. Achieve measurable energy savings for low-income Vermonters through the direct installation of energy efficiency products;
2. Identify additional opportunities for energy efficiency in low-income Vermonters' homes that can be referred to efficiency programs designed to serve these individuals, such as the Weatherization Assistance Program; and,
3. Increase the number of low-income Vermonters who are aware of and opportunities for energy efficiency; and,

Scope of Work

Efficiency Vermont and Burlington Electric believe that one of the most effective ways for reaching low-income Vermonters is by conducting home energy visits wherein non-profit organizations directly install efficient products and identify additional energy saving opportunities. We are seeking organizations who are interested in conducting these home energy visits in the homes of their clients or constituents. These home energy visits consist of the following components::

1. ***Achieve energy savings:*** Direct installation of efficient products in the homes of low-income Vermonters. For budgeting purposes, proposal submitters should be aware that Efficiency Vermont and Burlington Electric will cover the cost of efficient products (outside of the grant). Efficiency Vermont and Burlington Electric will provide the following products free-of-charge for direct installation:
 - LEDs
 - Advanced power strips
 - Low-flow showerheads and faucet aerators
 - Pipe wrap for domestic hot water
 - Low-cost weatherization products such as caulking and weather stripping
2. ***Identify energy-saving opportunities:*** Identification of additional efficiency opportunities in the home, including:
 - Inefficient refrigerators, freezers, and clothes washers
 - Opportunities for reducing heating and cooling costs

- Eligibility for energy-efficient mobile home replacements
- Eligibility for the Weatherization Assistance Program¹ or other programs
- Other efficiency programs and opportunities, as identified by the submitter

3. **Increasing awareness:** Informing clients and constituents about, the benefits of energy efficiency, efficiency opportunities in the home, and available resources.

Educational outreach methods can include:

- Informing constituents through face-to-face contact in the home
- Conducting community-level workshops for constituents
- Developing a peer-based “trusted source” energy efficiency information initiative
- Other outreach methods, as identified by the submitter

Partnership Nature of this Program

Efficiency Vermont and Burlington Electric view this program as a partnership with grantees. As such, Efficiency Vermont and Burlington Electric will provide support to help ensure grantees success.

Efficiency Vermont and Burlington Electric’s support is expected to involve:

- Training grantees staff, peers, and volunteers on how to conduct a home energy visit, including understanding and explaining an electric bill, directly installing efficient products and identifying energy efficiency opportunities in the home. Efficiency VT will provide to grantees energy-efficient products free of charge to install in the homes of their clients and constituents
- Paying for staff time and covering operational expenses incurred under this grant program
- Providing informational materials on a wide variety of efficiency opportunities and services available
- Offering additional support as needed

Grant recipients will have overall responsibility for successfully implementing the program, including:

- Conducting home energy visits in the homes of constituents
- Reaching out to and engaging constituents to encourage them to have a home energy visit conducted in their homes
- Securing necessary staff resources and overseeing the work performance of all staff and other individuals involved in conducting home energy visits
- Tracking participation levels, distribution and/or installation of energy-saving products, and data collection relating to location and number of low-income households

Program Duration and Budget

- **Duration:** This is a 9-month grant program that begins on April 1, 2017 and ends on December 31, 2017.
- **Budget:** Efficiency Vermont and Burlington Electric expect to award between 5-10 proposals. Organizations are encouraged to submit proposals in the \$10,000 - \$30,000 range.

¹ Vermont’s Weatherization Program helps low-income residents—particularly older Vermonters, people with disabilities, and families with children—save fuel and money by improving the energy efficiency of their homes.

Proposal Requirements

Grant applicants should be nonprofit organizations and have the following knowledge, skills, and experience:

1. Long-standing relationships with constituents
2. Experience working with low-income populations
3. Demonstrated capacity to manage direct assistance programs
4. Organizational capacity to incorporate energy efficiency services into workload
5. Financial management experience and in good financial standing

Prior experience in managing or implementing energy efficiency program is not necessary. Efficiency Vermont and Burlington Electric will provide what training and technical assistance is needed to ensure that staff and volunteers involved in this program are well-prepared to conduct home energy visits.

Proposals should include the following;

1. **Organization name**
2. **Primary address**
3. **Primary contact name, phone, and e-mail address**
4. **Organization overview.** Provide a brief description of your organization's mission and goals, and the services you currently provide. Please provide proof of non-profit status.
5. **Program approach:** Describe how you propose to deliver and complete the work identified in the Scope of Work described above.
6. **Constituents served:** Describe which low-income group or groups you plan to serve under the grant program. Provide documentation that at least 60% or more of the customers/clients to be served by the program will be low-income. For purposes of this grant, low-income is defined as 80% or less of Vermont median household income. Please reference the sources of your documentation of the percentage of low-income customers that you serve.
7. **Name, title, and short biography of key program implementation personnel.** For each key person identified above identified in Item 5 above, provide a one-paragraph biography describing his or her qualifications and experience.
8. **Project budget.** Provide a project budget that describes associated hourly fees and estimated number of hours for personnel, as well as anticipated expenses. The costs for energy efficient products should not be included in your budget as Efficiency Vermont and Burlington Electric will provide them through other budgetary means. Submitters are encouraged to utilize volunteers wherever possible to reduce budget costs.
9. **References:** Please supply three (3) references that either have used your professional services for an outreach program of a similar nature or are very familiar with your organizational capacity to design and execute a program of similar size and scope.

Please provide a contact name, address, phone number, and e-mail address for each reference.

Evaluation of Proposals

Efficiency Vermont and Burlington Electric will evaluate proposals on the basis of submitters' qualifications and evidence of their capacity to carry out the work. Efficiency Vermont and Burlington Electric will use the following criteria to evaluate proposals:

- ***Responsiveness to the scope of the RFP:*** Completeness of the organization's response to the specific requirements of the Scope of Work and evidence that the work will be completed in a timely manner. (30 points)
- ***Demonstrated experience, expertise, and qualifications:*** Experience and qualifications of the team in implementing similar type programs to engage your constituents. (30 points)
- ***Magnitude of impact:*** Total estimated number of individuals anticipated to receive home energy visits and estimated percentage of low-income individuals to be served by your organization under this program. (20 points)
- ***Cost-effectiveness:*** Estimated cost per home energy visit conducted. Proposals with in-kind contributions will be viewed more favorably. (20 points)

Organizations that have not previously received funding under this grant program will also receive priority. Efficiency Vermont and Burlington Electric reserve the right to evaluate proposals based upon criteria not listed above.

Proposals are due by 5:00 p.m. on March 17, 2017. Proposal selection will be qualifications-based. This RFP does not commit Efficiency Vermont or Burlington Electric to award a grant or to pay any costs incurred in the preparations or submission of proposals. Efficiency Vermont and Burlington Electric reserve the right to reject any or all proposals received in response to this RFP, to negotiate with any of the applicants in any manner deemed to be in the best interest of Efficiency Vermont and Burlington Electric, and to cancel the RFP, in part or in its entirety at Efficiency Vermont and Burlington Electric's discretion. Organizations with existing contracts or grants with Efficiency Vermont and/or Burlington Electric that are not in full compliance with their contractual obligations are not eligible for funding under this grant program.

RFP Schedule

The schedule for the Community Energy Partnership Grant Program is as follows:

- RFP issued February 3, 2017
- RFP questions submitted February 17, 2017
- Answers to questions posted February 24, 2017
- Proposals due March 17, 2017
- Grantees selected March 24, 2017
- Grants awarded and program begins April 1, 2017

Submission Deadline and Requirements

The deadline for submission of proposals is **5:00 p.m., March 17, 2017**. Please e-mail an electronic version of your proposal to Paul Markowitz, Program Manager, Efficiency Vermont at pmarkowitz@veic.org. Supplemental items that cannot be sent electronically must be sent as hard copy. These materials must also be received by 5:00 p.m. on March 17, 2015. All mailed materials should be addressed to:

Paul Markowitz, Program Manager
Efficiency Vermont
128 Lakeside Avenue, Suite 401
Burlington, VT 05401

Questions regarding this RFP should be submitted in writing by **5:00 p.m., February 17, 2017**. Questions should be directed to: Paul Markowitz, Community Energy Program Manager, Efficiency Vermont, pmarkowitz@veic.org. All questions and responses will be posted on <http://www.veic.org/company/requests-for-proposals> by 5:00 p.m. February 24, 2017.