



Solicitation Number: RFQ - DCSEU-2024-IQC

Notice Type: Request for Qualifications (RFQ)

Title: Energy Efficiency and Support Services: Save Energy IQC

Short Title: Save Energy IQC

Notice Type: Request for Qualifications

Date: 10/19/2023

Response Due Date: Rolling

I. OBJECTIVE

Vermont Energy Investment Corporation d/b/a the District of Columbia Sustainable Energy Efficiency Utility (DCSEU) is issuing this Request for Qualifications (RFQ) to qualify service providers to provide a broad range of energy efficiency services which are further described in Section IV (Scope of Work). Experienced and qualified service providers who are committed to reducing energy consumption, improving the efficiency of low-income housing, and increasing the number of green-collar jobs in the District of Columbia are invited to respond to this RFQ.

Successful bidders selected through this RFQ will be awarded either one or more subcontracts that will cover a single fiscal year (e.g., Fiscal Year 2024, October 1, 2023 - September 30, 2024) or multiple fiscal years (e.g. Fiscal Years 2023- 2026, (October 1, 2023 - September 30, 2026), subject to the availability of funding. If awarded a subcontract, successful bidders will be given "Service Provider" status and can bid on specific projects with the DCSEU. A subcontract does not guarantee work. All work will be authorized by the DCSEU through issuance of a work order.

This RFQ will be open now through the end of Fiscal Year 2024 (September 30, 2024) unless extended in writing by the DCSEU. The DCSEU will accept responses on a rolling basis. All bidders must demonstrate the capacity and technical capabilities necessary to successfully complete the services described in Section IV (Scope of Work). Bidders may submit a response for one of the services or a combination of services set forth in Section IV (Scope of Work).

The DCSEU is funded by the Government of the District of Columbia. District contracts more than \$250,000 require at least 35 percent of the contracting efforts or funds to be spent with Certified Business Enterprises (CBEs). To help ensure the DCSEU meets this requirement, preference points will be awarded to CBE/SBE bidders and the DCSEU will require at least 35 percent of the funds paid to successful bidders to be retained by a CBE/SBE unless otherwise waived in writing by the DCSEU.

II. BACKGROUND

The Council of the District of Columbia enacted the Clean and Affordable Energy Act of 2008 (CAEA), which called for the creation of the DCSEU. DOEE contracted with VEIC to operate the DCSEU in 2011; the parties entered a new contract in 2017 and DOEE exercised a 5-year option period beginning in FY22 for continued DCSEU operations.



The purpose of the DCSEU is to design and administer programs in the District to reduce and greenhouse gas (GHG) emissions, increase energy savings and renewable energy generating capacity, reduce the growth of peak electricity demand, improve the energy efficiency of low-income housing, reduce the growth of energy demand of the largest energy users, increase the number of green collar jobs in the District, and support businesses within the District (i.e. Certified Business Enterprises).

The DCSEU has been working with DOEE since 2011 to deliver comprehensive sustainable energy services to residents, commercial enterprises, and institutions. It has also supported targeted solar initiatives at DOEE's request throughout this period.

Since June 2018, the DCSEU has also served as the administrator of the DOEE's SfA program. In this time, through single-family and community solar installations, the DCSEU has been able to help over 4,000 income-qualified District households reduce their electricity bills by approximately 50% for the next 20 years and has worked extensively with Certified Business Enterprises (CBEs) throughout the District to complete this work. The DCSEU looks forward to continuing and expanding on these successes and, pending DC Council budget approval, anticipates increasing funding for the program in FY2024 and beyond.

All DCSEU Program operate according to the District Government's fiscal year (October 1 – September 30) and are subject to annual appropriation of funds under VEIC's prime contract with DOEE to operate the DCSEU. Services for FY24 are expected to commence in October, 2024.

III. PERIOD OF PERFORMANCE

The performance period for the energy efficiency services will start on or after October 1, 2023, and must be completed by September 30, 2024, unless extending in writing by the DCSEU. The DCSEU reserves the rights to extend the services for up to two (2) additional one-year periods.

IV. SCOPE OF WORK

Successful service providers shall provide the full range of energy efficiency-related services detailed below, including technical and management expertise and product solutions to meet the requirements of the DCSEU. As noted above, bidders may submit a response for one of the services **or** a combination of services set forth below. The DCSEU, at its sole discretion, reserves the right to consider potential service providers for other functional categories listed in this solicitation.

1. Commercial and Institutional Direct Services (C&I)- Attachment 1
2. Income Qualified Efficiency Fund - Attachment 2
3. QA/QC Residential Inspection Services (In-Unit) - Attachment 3
4. Affordable Homes Electrification Program -Attachment 4
5. Refrigeration Management – Leak Detection and Repair - Attachment 5
6. Affordable Housing Retrofit Accelerator Energy Auditing and Analysis - Attachment 6
7. Affordable Housing Retrofit Accelerator Implementation Services – Attachment 7
8. Affordable Housing Retrofit Accelerator Performance Testing - Attachment 8



V. PREPARING AND DELIVERING A RESPONSE

It is not necessary to respond to all Functional Categories within the Scope of Work provided in this RFQ. Bidders may choose which Functional Categories are appropriate for their business. However, bidders must follow exactly, and be responsive to, ALL requirements of this RFQ. It is the bidder's responsibility to provide all specified materials in the required form and format. Responses that are not in the required form and format may not be considered.

Responses to the RFQ must be submitted through the DCSEU Contractor Web Portal (via <https://portal.dcseu.com/SitePages/Home.aspx>) and Financials must be emailed as outlined below. See **Section VI** (Proposal Requirements) below for more information about submitting your response through the DCSEU Contractor Web Portal.

In order to submit a response, the bidder must request a username via dcseu.com [web form](#). Please allow up to two (2) business days for the username and password to be sent.

If you are a current DCSEU subcontractor submitting Green Jobs reports, please use that username.

VI. PROPOSAL REQUIREMENTS (MINIMUM REQUIREMENTS)

Bidders must identify in their response the scope of work(s) they wish to perform for the DCSEU. In addition, bidders must provide the following information.

- 1. Name of the business, contact person, and contact information:** Name of the business, contact person, and contact information, including full legal name of company for contracting purposes, address, telephone, mobile telephone number, e-mail address, and website address, as applicable.
- 2. Company Profile:** Provide a brief company profile, not exceeding 500 words.
- 3. Statement of ownership:** Describe the type of business entity (sole proprietorship, corporation, LLC, or other), list the majority and minority owners, and the state of incorporation.
- 4. Past Performance:** Summarize actual performance on at least two (2) efforts involving services like the scope(s) of work you wish to perform for the DCSEU. The past performance evaluation will examine how the bidder's past performance demonstrates their capability and capacity to deliver high-quality service and solutions. In conducting the past performance assessment, the DCSEU may use feedback obtained from other sources as well as that provided in the response. This review will focus on the size, scope and complexity of the efforts, the relevance of the past performance, and the actual results achieved.



5. **Evidence of CBE (SBE) status; and commitment to hire District Residents is required.**
Provide a current copy of your District of Columbia CBE certification, if any. Preference will be given to CBE Service Providers who employ a higher percentage (greater than 75%) of District Residents. Preference will also be given to non-CBE firms with a current workforce greater than 75% District Residents. **All bidders shall disclose in their response if bidder can meet or exceed the 35 percentage minimum CBE spend requirement referenced above. This requirement may be satisfied by bidder, its suppliers, vendors, or lower-tier subcontractors.** If the percentage varies by scope of work, you must include a breakdown by scope of work and indicate what percentage will be retained by third parties.
6. **Names and brief description of key personnel:** who you expect will perform the scope(s) of work. All bidders must include the following information:
 - a. The number of full-time and part-time staff, and the location of employees by City and State.
 - b. The name and full address of each District Resident employee whom you intend to commit to use if awarded a subcontract.
 - c. The number of future District Residents whom you commit to hire if awarded a subcontract.
7. **License:** Proof of **District of Columbia Basic Business license(s)** and / or all applicable license(s) required to perform the services (e.g., electrical or plumbing license). Licenses must be current.
8. **Financial Solvency:** Before awarding a subcontract, the DCSEU will evaluate financial statements to determine bidder's eligibility. Determination will be made on a "qualified or not qualified" basis at the sole discretion of DCSEU. Points will not be awarded for this item. Those bidders who are determined "not qualified" based on financial solvency may be given an opportunity to submit additional documents for the DCSEU's consideration. Financial documents must be signed and attested as accurate by an officer of the company. Bidder's financial solvency:
 - a. Must be sent by email to Angela Johnson at ajohnson@dcseu.com, contain "**RFQ • SAVE ENERGY- CONFIDENTIAL**" in the subject line and be received by the DCSEU no later than **two (2) business days after submitting responses to this RFQ.**
 - b. Must include one (1) balance sheet and (1) profit loss summary for the last calendar or fiscal year.

This is required information. Financial documents submitted will not be returned, so bidders shall retain duplicate original documents. Financial documents must be signed and dated by a company officer. This is required information.



9. **Certificate of Clean Hands (DC):** This certificate must be dated within six (6) months of the date submitted.

Certificate of Insurance . Please supply a copy of a current Certificate of Insurance showing, at a minimum, General Liability, Auto, and Workers Compensation Insurance. If awarded a subcontract, the bidder will also be required to provide a final certificate of insurance naming VEIC and the Government of the District of Columbia as additional insureds, and that includes any additional insurance requirements that may apply. The Certificate of Insurance shall be provided directly to the DCSEU by the insurance broker or agent and shall include a requirement that the DCSEU be notified in writing by the insurance broker or agent of any and all changes to the policy during the period of coverage noted herein. A successful bidder will be required to maintain the types of insurance coverage listed in their subcontract for the term specified in the subcontract. Neither the District nor VEIC will make any separate measure or payment for insurance costs. Below is a list of the insurance coverages and limits that **may** apply. **Bidders shall note in their response if they cannot meet any of the below requirements.**

- i. **Commercial General Liability Insurance.** Subcontractor shall provide evidence satisfactory to VEIC with respect to the Services performed that it carries \$1,000,000 per occurrence limits; \$2,000,000 aggregate; bodily injury and property damage including, but not limited to: premises -operations; broad form property damage; products and completed operations; personal and advertising injury; and contractual liability and independent contractors; however, for subcontracts under \$100,000, Subcontractor may instead provide evidence satisfactory to VEIC with respect to the services performed that it carries \$1,000,000 in Umbrella and Liability Insurance. The policy coverage will be primary and non-contributory with any other insurance maintained by the District and VEIC, and will contain a waiver of subrogation, as set forth in Section 7.f. Subcontractor will maintain completed operations coverage for five (5) years following the Subcontract Performance Period.
- ii. **Automobile Liability Insurance.** Subcontractor shall provide automobile liability insurance to cover all owned, hired or non-owned motor vehicles used in conjunction with the performance of this Subcontract. The policy shall provide a \$1,000,000 per occurrence combined single limit for bodily injury and property damage. The automobile liability insurance must be held by Subcontractor, and not its individual employees.
- iii. **Workers' Compensation Insurance.** Subcontractor shall carry Workers' Compensation insurance, and with respect to such insurance shall comply with the statutory mandates of the District of Columbia and any other jurisdiction in which the Subcontract is performed.
- iv. **Employer's Liability Insurance.** Subcontractor shall provide employer's liability insurance as follows: \$500,000 per accident for injury; \$500,000 per employee for disease; and \$500,000 for policy disease limit.
- v. **Crime Insurance (3rd Party Indemnity).** Subcontractor shall provide a 3rd Party Crime Policy to cover the dishonest acts of Subcontractor's employees which result in a loss to the District. The policy shall provide a limit of \$1,000,000 per occurrence.



- vi. **Cyber Liability Insurance.** Subcontractor shall provide Cyber Liability Insurance, with limits not less than \$2,000,000 per occurrence or claim, and \$2,000,000, aggregate. Coverage shall be sufficiently broad to respond to the duties and obligations as is undertaken by Subcontractor in this Subcontract and shall include, but not limited to, claims involving infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress, invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, alteration of electronic information, extortion and network security. The policy shall provide coverage for breach response costs as well as regulatory fines and penalties as well as credit monitoring expenses with limits sufficient to respond to these obligations.
- vii. **Professional Liability Insurance (Errors and Omissions).** Subcontractor shall provide Professional Liability Insurance (Errors and Omissions) to cover liability resulting from any error or omission in the performance of professional services under this Subcontract. The policy shall provide limits of \$1,000,000 per occurrence for each wrongful act and \$2,000,000 annual aggregate.
- viii. **Sexual/Physical Abuse and Molestation.** Subcontractor shall provide evidence satisfactory to VEIC and the Contracting Officer with respect to the services performed under this Subcontract that it carries \$1,000,000 per occurrence limits; \$2,000,000 aggregate. This insurance requirement will be considered met if the general liability insurance includes sexual abuse and molestation coverage as a separate endorsement for the required amounts as evidenced on its Certificate of Insurance.
- ix. **Environmental or Pollution Liability Insurance:** Subcontractor shall provide Environmental or Pollution Liability insurance policy to cover costs associated with bodily injury, property damage and remediation expenses associated with pollution incidents, including, but not limited to, mold, asbestos or lead removal. The policy shall provide at minimum limits of \$1,000,000 in coverage per incident and \$2,000,000 aggregate.
- x. **Umbrella or Excess Liability Insurance.** Subcontractor shall provide umbrella or excess liability (which is excess over employer's liability, general liability, and automobile liability) insurance as follows: \$3,000,000 per occurrence. All liability coverage must be scheduled under the umbrella and that the combined limits of the above required policies should be no less than \$3,000,000 aggregate. However, for subcontracts under \$100,000, Subcontractor may instead provide evidence satisfactory to VEIC with respect to the services performed that it carries \$1,000,000 in Umbrella and Liability Insurance.

10. List of CBE Service Providers' Subcontractors. If applicable, for each CBE subcontractor and non-CBE subcontractor provide the following information, which must be signed by each subcontractor:

- a. Company's full legal name, contact person, address, telephone number.
- b. Intended percentage of work to be performed by the subcontractor.
- c. The same employment data required above in number 6 (a), (b) and (c).



11. Evidence of Strength of the Service Provider's team. Provide a qualification statement on team's experience and ability to perform the scope(s) of work and participate in a DCSEU program. This description must include:

- a. Technical competencies & experience.
- b. Management plan for accomplishing the work.
- c. Proposed personnel and their training and experience relative to the skills required to perform the services.
- d. Staffing capabilities-the Service Provider must be able to meet any electronic submission requirements of the DCSEU for incentive processing and compliance reporting; and
- e. Two (2) client references and their contact information. References must be able to comment on project work of similar scope and scale, business practices and stability.

12. Disclosure of any pertinent litigation

- a. Bidder must disclose any judgment, lawsuit, action, or regulatory decision that may affect Bidder's ability to meet any requirements of this RFQ or Bidder's response. Bidder agrees to provide a detailed description of any of the above events and the applicable case number in its response.
- b. This disclosure obligation is an on-going material obligation that applies from the date of response submission through the expiration of any resulting contract award. Failure to disclose pertinent litigation may result in the disqualification of Bidder's response.

A. Confidentiality: All responses and information submitted by bidder ("bidder's response") to this RFP will be subject to disclosure under the District of Columbia Freedom of Information Act ("FOIA").¹ A bidder's response may be released pursuant to a freedom of information request, with redactions based on FOIA exemptions from disclosure. If bidder's response includes information or materials considered by bidder to be confidential, bidder shall clearly mark such sections and provide a written explanation for each marked section. The written explanation must address the confidential nature of each marked section and an explanation of the harm that would occur if disclosed. Under no circumstance can the entire response or price information be marked as confidential. The final determination as to whether to release information subject to FOIA will be made by the District's Government.

¹ 1 D.C. Official Code § 2-531 et seq.



VII. EVALUATION CRITERIA

Responses will be assessed in accordance with the following evaluation criteria,

Maximum Points

(For SOW categories that **ARE NOT** requesting Pricing Proposals to be submitted for

Evaluation)

- | | |
|-----------------------------------------------------------------------|-----------|
| • Company Qualifications | 60 |
| ○ Key personnel qualifications for type of work | 10 |
| ○ Relevant experience | 30 |
| ○ Quality of management plan | 10 |
| ○ References (minimum of 3) | 10 |
| • Company Status- CBE/SBE Certification | 20 |
| • Employment of District of Columbia-residents (staff/subcontractors) | 20 |

Total Points available **100**

(For SOW categories that **ARE** requesting Pricing Proposals to be submitted for Evaluation)

- | | |
|-----------------------------------------------------------------------|-----------|
| • Company Qualifications | 50 |
| ○ Key personnel qualifications for type of work | 10 |
| ○ Relevant experience | 20 |
| ○ Quality of management plan | 10 |
| ○ References (minimum of 3) | 10 |
| • Pricing | 20 |
| • Company Status- CBE/SBE Certification | 15 |
| • Employment of District of Columbia-residents (staff/subcontractors) | 15 |

Total Points available **100**

The DCSEU reserves the right to evaluate responses on criteria not listed above.

The DCSEU will evaluate all responses to determine which bidders are best suited for providing the desired services. The DCSEU may request additional information from one or more bidders and may request personal interviews with the highest-ranked bidders.



Limitation

This RFQ does not commit the DCSEU to awarding subcontracts, or to procuring or subcontracting for services or supplies. The DCSEU reserves the right to accept or reject any or all responses received, to waive any informality or irregularity in any response received, to be the sole judge of the merits of the respective responses received, to negotiate with all qualified bidders, to determine the timing of the start of the services, not to proceed with some or all of the work, and to cancel in part or in its entirety the RFQ if any of these actions is deemed by the DCSEU, in its sole discretion, to be in the DCSEU's best interest. The DCSEU will not reimburse costs incurred by bidders in preparing responses to this RFQ.

VIII. SUBMITTING A RESPONSE

The DCSEU welcomes all qualified bidders to respond to this RFQ. All responses must be submitted through the DCSEU Contractor Web Portal (<https://portal.dcseu.com>). Bidders may request a copy of the DCSEU's Solicitation Guide for the Contractor Web Portal by sending an email to proposals@dcseu.com.

To submit a response, **new bidders must request an account by completing the username account request form available at <http://www.dcseu.com/about/rfq-profile-request-form>. The DCSEU will process the request within two business days or sooner, when possible.** Returning bidders may use their existing account. If you have forgotten your username, please contact WebPortalHelp@DCSEU.com.

Questions must be submitted via e-mail with the subject line "RFQ-Save Energy IQC Questions" to proposals@dcseu.com. Telephone calls, faxes, and / or requests for a solicitation will not be accepted or acknowledged.

CONTRACTING OFFICE

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