



**METROPOLITAN AREA PLANNING COUNCIL ("MAPC")
60 TEMPLE PLACE
BOSTON, MA 02111**

REQUEST FOR INFORMATION ("RFI")

**DOCUMENT TITLE:
HOME PERFORMANCE CONTRACTORS**

**COMMBUYS #: BD-20-1217-MAP04-MAP04-46308
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1. INTRODUCTION

1.1 Notice to Respondents

Respondents to this Request for Information (“RFI”) are encouraged to respond to all of the questions in this document. Responses to this RFI will assist MAPC in understanding the current state of the marketplace with regard to the solicited information. This RFI does not obligate MAPC to issue a solicitation or to include any of the RFI provisions or responses in any future solicitation. An RFI response is entirely voluntary, and will not affect MAPC’s consideration of any proposal submitted in the event that it issues a subsequent procurement; nor will it serve as an advantage or disadvantage to the respondent in the course of any RFR, RFQ, or RFP that may or may not be subsequently issued.

1.2 Purpose

The Metropolitan Area Planning Council (“MAPC”) is issuing this RFI to solicit information from vendors interested in partnering with municipal governments to enhance outreach to residents on energy efficiency services, which may include the collaborative development and implementation of joint outreach and marketing initiatives. MAPC, a public sector organization, is the regional planning agency for Metropolitan Boston, serving a region of 3.2 million people in 101 cities and towns by providing research, technical assistance, and direct services for municipalities. More information about MAPC and the region we serve can be found at www.mapc.org.

MAPC seeks to acquire an understanding of the state of the home performance contractor (“HPC”) market providing residential energy efficiency services through the Mass Save program to our region. We are also seeking to understand which contractors operating in the Metropolitan Boston region are willing and able to work with municipal governments to develop outreach initiatives that increase participation in energy efficiency services. In this, we also hope to learn about contractors’ capacity to participate in other energy-related engagement that aligns with municipal goals, such as solar, heat pump, or green municipal electricity aggregation programs.

This RFI is being conducted by MAPC in coordination with the Cambridge Energy Alliance (“CEA”), a program of the City of Cambridge that helps residents, businesses, and institutions become more energy efficient and access renewable energy services.

Release of this RFI presents an invitation for interested parties to offer MAPC information regarding home performance contracting and residential energy efficiency services. The primary goal of this RFI is to gather information from qualified parties to support and inform future planning initiatives. This RFI does not constitute a solicitation for bids or proposals and will not directly result in a contract award for the identified services.

This document contains MAPC business and technical considerations for respondents to review and respond to with information regarding approaches to marketing and outreach as well as their experience working collaboratively with municipal governments. Respondents are by no means constrained in providing information to this request and are encouraged to provide further information in support of the stated purpose that may be responsive, relevant, and considered noteworthy.

1.3 Definition of Terms

Community organization: A local nonprofit or volunteer-run organization that is working in partnership with a municipal government to promote residential energy efficiency.



Green Municipal Aggregation: An electricity supply contract in which a city or town contracts with an electricity supplier on behalf of residents and businesses who have not already selected a competitive supplier and chooses to exceed the state requirements for renewable energy generated by new projects built in the New England region.

Home performance contractor: A vendor that offers customers turnkey energy efficiency services, from performing home energy assessments to installing weatherization or other efficiency improvements.

1.4 Needs and Possible Use Cases

MAPC understands that many home performance contracting businesses have been founded or scaled up in recent years to serve the demand for residential energy efficiency services created by the Mass Save program. This RFI aims to gather information from HPCs about their capacity to serve large numbers of customers in a specific community and work collaboratively to develop and deliver outreach and marketing to residents.

Because of the varied and evolving marketplace, MAPC seeks to better understand the home performance market and how coordination between communities and HPCs can improve access to energy efficiency services and other energy/climate related programs that municipalities promote.

MAPC has provided the following use cases to help interested parties in preparing responses to this request for information. We recognize that no one vendor is likely to serve the needs of all these use cases.

Use Case 1. MAPC seeks to understand how HPCs and municipal governments can co-create outreach strategies that significantly increase the uptake of energy efficiency in homes. Under this case, the community and the HPC would work together to develop a plan for marketing the HPC's services and other relevant opportunities to reduce energy use and greenhouse gas emissions. The community would advise the HPC about the most effective ways to market to residents and give guidance about how to allocate marketing resources. The community may also support outreach and marketing by contributing staff or volunteer time. This scenario could involve the HPC and community developing a written plan to be approved by the community.

Use Case 2. MAPC seeks to understand how an HPC responds in the case that a customer is dissatisfied with the work completed by the HPC. In this scenario, an unhappy customer contacts the HPC or the community to express dissatisfaction and requests that the HPC return to repair damage to their home. In this scenario, the community would direct the customer to the HPC and expect the HPC to respond to the customer.

Use Case 3. MAPC seeks to understand how an HPC would respond to a request from a community to provide information to customers about other relevant opportunities to save energy or reduce greenhouse gas emissions (e.g., green municipal aggregation, Solarize campaign, community shared solar opportunities) or other municipal initiatives (recycling, composting, waste reduction, etc.) during energy assessments or other customer visits. Communities may see the contractor's visit to a customer as an important opportunity to share other relevant information and/or connect that customer with other resources and programs. In this scenario, an HPC's staff might be asked to carry additional handouts or familiarize themselves with information provided by the local partner so that they can deliver that information.

Use Case 4. MAPC seeks to understand how an HPC would provide data to a community about the efficacy and impact of its work in that community. The data might include the number of



customers reached through outreach activities; the numbers of home energy assessments completed; the number of energy efficiency measures installed and which types of measures; the estimated energy savings, dollar savings, and avoided greenhouse gas emissions; and customer satisfaction data.

1.5 Respondent Submissions

Interested parties should describe their approaches to any or all of the use cases referenced above, with an explanation. In addition, interested parties are requested to provide contact information of customers and/or municipal governments or community organizations with which they have partnered in the past as references. The provision of examples of marketing materials (print, web, video, or other) is encouraged.

MAPC is requesting information from interested parties that provide brief and concise expository responses to the following questions as they relate to the use cases referenced above.

Respondent Background

1. Where is your business located and what is your service area?
2. How many staff does your business have?
3. What services do you provide? Which services do you generally subcontract out to other businesses?
4. How many Mass Save energy assessments have you performed each year over the last 3 years?

Outreach and Marketing Information

5. Does your business have a marketing department? If so, how many marketing staff do you have? How many potential customers does your marketing currently reach?
6. What is your staff capacity to attend community events, host workshops, canvass, and create outreach opportunities with local businesses? What is your staff capacity to integrate with the municipality's social media and websites?

Customer Service Information

7. What is your goal in terms of responding to inbound scheduling requests? What is your capacity to engage in outbound scheduling calls/emails?
8. Is your business willing to guarantee its work? If so, please describe the terms of your work guarantee.
9. How does your business typically respond to customer complaints?

Community Partnership Information

10. Does your business have any prior experience partnering with municipalities? If so, please describe. Is your business willing to partner with a municipal government to jointly design and co-create an outreach program and customer service protocols?
11. Are you interested in joining exclusive partnerships with municipalities? What would you be interested in offering and what would you expect as part of an exclusive partnership?
12. Would your business be willing to speak with customers about green municipal electricity aggregation and other local sustainability initiatives during home energy assessments and the installation of energy efficiency upgrades?
13. If you have worked with municipal governments or community organizations in the past, what major barriers or hurdles have you encountered? How would you address these issues in future arrangements?



Other Information

14. Does your business have experience working with and/or marketing to underrepresented groups, such as renters, residents with moderate incomes (60%-80% Area Median Income), and non-English-speaking residents? If so, please describe.
15. What experience does your business have with multi-family buildings, renters, landlords, and condominiums? Please describe how you connect customers in buildings over 4 units to the appropriate Mass Save programs. Please describe how you connect low-income residents to the appropriate Mass Save programs.
16. Is your business willing to provide services above and beyond those required by the Mass Save program (e.g., more in-depth energy assessments, pre- and post- blower door testing to measure air flow reduction)?
17. What data are you able to provide to municipalities to report program participation and savings impacts to community partners? How often would you be willing to provide such reports to community partners?
18. Is there a use case, question, or other factor we should consider when exploring residential outreach partnerships with HPCs? What have we missed? Please provide any other information you think might be relevant.

1.6 Posting

Please note that this RFI is issued solely for the purpose of obtaining information. Nothing in this RFI shall be interpreted as a definitive commitment on the part of MAPC to procure or enter into a contract with any Respondent.

Respondents are responsible for entering content suitable for public viewing, as all of the responses and questions are available to the public. Respondents must not include any information that could be considered personal, security sensitive, inflammatory, incorrect, collusive, or otherwise objectionable, including information about the Respondent's company or other companies.

1.7 Form of Respondent Submission

Respondents should submit one (1) electronic PDF response by the date and time set forth in the below schedule. Late responses may be disregarded.

All responses must include a cover page on formal letterhead with the official name, address, and contact information of the firm or entity submitting the response with both contact information and signature provided. Respondents are requested to respond to each use case and questions cited herein, as well as provide additional relevant information. A final conclusion page may be provided summarizing the overall response to the RFI. Please consecutively number all pages of the response.

2. ESTIMATED CALENDAR

Event	Date
RFI Release Date	December 2, 2019
Email Response to Brooks Winner, Clean Energy Coordinator II at MAPC at bwinner@mapc.org	December 20, 2019 5:00 p.m. ET
Informational Sessions	January 2020 (Tentative)

3. INFORMATIONAL SESSIONS

In addition to written RFI responses, MAPC may invite any or none of the Respondents to make in-person demonstrations of services, experience, offerings, methodologies and expertise applicable to this RFI. Any



such demonstrations must relate directly to the MAPC needs outlined in this RFI, and Respondents must not use this time for standard marketing sales presentations. MAPC retains the right to conduct informational session(s) associated with this RFI and retains the right to request additional information from Respondents, including further explanation or clarification from any and all Respondents during the review process. MAPC may request onsite vendor visits. More details on the informational sessions will be released after the RFI submission date.

4. REVIEW RIGHT, PUBLIC RECORDS, AND COST

Responses to this RFI may be reviewed and evaluated by any person(s) at the discretion of MAPC, including independent consultants retained by MAPC now or in the future.

All responses to this RFI will be a public record under the Commonwealth's Public Records Law, Massachusetts General Laws Chapter 66 Section 10, regardless of confidentiality notices set forth on such writings to the contrary.

All responses and other documents submitted in response to the RFI become the property of MAPC. MAPC is under no obligation to return any documents submitted by a vendor. Further, MAPC retains the right to use any information obtained through this RFI in any future solicitation.

By submitting a response, Respondents agree that any cost incurred in responding to this RFI, or in support of activities associated with this RFI, shall be the sole responsibility of the Respondent. MAPC shall not be held responsible for any costs incurred by Respondents in preparing their respective responses to this RFI.