



REQUEST FOR PROPOSALS

STEP-UP Home Performance Technical Consultant

Issued June 9, 2011, as revised June 11, 2011 and June 17, 2011

1. SUMMARY

The Town of University Park, MD (the “Town”) is implementing the *Small Town Energy Program for University Park* (“STEP-UP”), a 3-year effort designed to achieve energy efficiency market transformation within University Park and to serve as a roadmap for energy transformation in small towns across the US. STEP-UP includes a full suite of model activities for replication including: energy audits and retrofits for homes, financial incentives, local community delivery partners, and leading edge, but low-cost, social media techniques. STEP-UP also includes integrated solar and voluntary carbon market components. More information about STEP-UP can be found at www.mystep-up.org.

The purpose of this Request for Proposals (“RFP”) is to solicit bids for an individual or firm to serve as the STEP-UP Home Performance Technical Consultant (the “Technical Consultant”). The Technical Consultant will be primarily responsible for providing technical assistance to the STEP-UP program, as directed by the STEP-UP Energy Coach or designate(s) from the STEP-UP Advisory Committee, with respect to home energy audits and energy efficiency improvements (the “Technical Services” as more specifically described below).

The Technical Consultant will be engaged on a consulting basis, whereby the Technical Consultant shall agree to provide a flexible number of hours of Technical Services per month (as determined pursuant to this solicitation), as and when called upon to do so by the Energy Coach, at an agreed upon hourly rate (as determined pursuant to this solicitation). The Technical Services shall commence as of July 11, 2011, or such other date as is mutually agreed upon by the parties.

The intent is to have the Technical Consultant provide third-party objective advice to the Town, the Energy Coach and to Town residents, as and when directed by the Energy Coach. Therefore, the Technical Consultant shall not be eligible to solicit or accept any compensated engagement to perform home performance service of any type from Town residents during the term of the Technical Services.

2. RFP TERMS & CONDITIONS

- a. This RFP is issued by the Town.
- b. For purposes of this document, the party to whom this RFP is addressed shall be referred to as “Bidder” and any materials submitted in response to this RFP shall be referred to as a “Proposal.”
- c. The Town is not liable for any costs or expenses incurred by a Bidder or any other person or entity in the preparation of their Proposal.

d. The Town is an Equal Opportunity Employer. Discrimination based on age, race, sex, handicap or national origin is expressly prohibited.

e. The Town reserves the right to reject any and all Proposals received from Bidders as a result of this RFP, as is in the best interests of the Town, as determined solely by the Town. In determining which Proposal is best, the Town will take into consideration the bid price and the experience, qualifications, references, responsibility and current availability of the Bidder to perform the Technical Services.

f. This RFP may be sent as a courtesy to known interested individuals and firms. The receipt of this RFP from the Town in no way implies that the recipient is a qualified bidder.

g. Any Proposal submitted to the Town is not confidential. All material submitted becomes the property of the Town. The Town has the right to use any or all un-copyrighted concepts presented in any Proposal. Approval or disapproval of a Proposal does not affect this right.

h. If it becomes necessary to revise any part of this RFP, an addendum will be provided to all respondents or Bidders who respond to the original RFP, and will be posted on the STEP-UP website – www.mystep-up.org.

i. To be considered, Bidder's Proposal must be complete and in the format indicated in this RFP, delivered by the date and time indicated in this RFP. In addition, the Town will accept no more than a 5-page narrative, excluding attachments, responding to the items contained in this RFP. Bidders will not be given an opportunity to change any part of a Proposal after submission.

j. The successful Bidder shall be required to enter into a contract with the Town in a form mutually agreed upon by the Town and such Bidder. Such contract shall indicate that the Technical Consultant understand and agrees that he/she/it shall not solicit or accept any compensated engagement to provide any home performance services to a resident of the Town throughout the term of the contract.

i. From the issue date of this RFP until a determination is made regarding the qualification of Bidders, all contacts with the Town concerning this RFP must be made through Suzanne Parmet, at energycoach@upmd.org.

3. TECHNICAL SERVICES

The Technical Consultant shall provide the following Technical Services, as and when needed and directed by the Energy Coach to do so, on behalf of STEP-UP generally and/or specific STEP-UP participants:

a. Attend whole-house energy audits, to ensure proper procedures are followed by the auditor.

b. Review whole-house energy audit reports and supporting documentation delivered to STEP-UP participants (the "Audit Reports")

c. Provide feedback on the Audit Reports with respect to specific issues raised, including but not limited to: the significance of test results, the efficacy and efficiency of particular recommendations, and alternative methods for achieving more cost effective results.

d. Provide feedback on proposals for implementing recommended energy efficiency improvements with respect to specific issues raised, including but not limited to: consistency between multiple proposals for the same work, the efficacy and efficiency of particular work scopes, and the reasonableness of costs.

e. Review improvements undertaken to ensure proper installation procedures were followed.

4. QUALIFICATIONS

The Technical Consultant shall demonstrate that he/she/it has all necessary qualifications and experience to undertake the Technical Services, as described herein. It is anticipated that the Technical Consultant shall have the following qualifications or shall demonstrate that he/she/it has qualifications that are substantially similar thereto and/or experiences that have enabled he/she/it to attain the knowledge and information equated therewith:

a. BPI certified Building Analyst.

b. BPI certified Envelope Specialist.

c. MHIC license or experience working for or in partnership with an MHIC licensed firm

d. If an individual or firm that has performed renovation, repair or painting projects from or after April 22, 2010, EPA certification to conduct renovation, repair and painting activities that may disturb lead-based paint pursuant to 40 CFR Part 745.89.

e. Participation in Maryland Home Performance with ENERGY STAR or in a local utility Home Performance with ENERGY STAR program, as a Participating Contractor or as an employee of a Participating Contractor.

f. At least 1 year of experience working as a whole-house energy auditor and/or contractor in the home performance industry in the Washington Metro Area.

5. BIDDER'S PROPOSAL

a. Required Materials. The Bidder must include the following information in the Proposal:

1) Resume or corporate profile clearly reflecting home performance qualifications and experiences.

- 2) Copy of applicable certifications and licenses.
- 3) Minimum and maximum number of hours per month that are required or preferred by the Bidder for the consulting arrangement to be feasible and/or desirable, and days of the week and times of the day that the Bidder is available to perform the Technical Services.
- 4) Hourly rate that is required or preferred by the Bidder for the consulting arrangement to be feasible and/or desirable. Note that travel hours shall not be billable and work hours shall be billed to the nearest one-quarter of an hour.
- 5) Any administrative expenses that the Bidder anticipates billing to STEP-UP (e.g. telephone, mileage, etc.). Note that out-of-pocket expenses shall require pre-approval to be reimbursed.
- 6) Any other terms and/or conditions required or preferred by the Bidder for the consulting arrangement to be feasible and/or desirable.
- 8) Description of the individual's or firm's current legal and financial situation, including: any bankruptcies filed, and any material (in excess of \$50,000) claims, judgments, arbitrations investigations or lawsuits pending.
- 9) If a firm, Bidder shall indicate a willingness to purchase and maintain during the entire term of the consulting arrangement commercial general liability insurance, professional errors and omissions insurance, and workers' compensation (if applicable), in such amounts as are reasonably required by the Town or as required by law.
- 10) List of at least three (3) professional references.

b. Delivery Requirements. One (1) printed and one (1) electronic copy of the Proposal shall be submitted to Suzanne Parmet no later than 4:00 pm on Friday, July 1, 2011, at the following addresses:

Electronic: energycoach@upmd.org
Printed: Attn: Suzanne Parmet, Energy Coach
c/o Town of University Park
6724 Baltimore Avenue
University Park, MD 20782

All correspondence should be marked "STEP-UP Home Performance Technical Consultant" in the subject line or on the envelope, as applicable.