

EPP RFP Bidders' Meeting

May 10, 2013



Development
Services Agency

AGENDA

- RFP Overview
 - Summary of Key Details
 - RFP Components
 - Deliverables
- RFP Review Process
- RFP Timeline
- Questions



* IMPORTANT NOTES *

- Section 2.3 states that the proposal must be packaged. **The proposal is NOT required to be sealed.** If the package is opened by Riffe building security it will **NOT** be rejected.
- Section 2.3 states that the proposal must be dropped off on the 24th floor. In the event that the reception desk has moved from the 24th floor up to the 26th, delivery there is acceptable.
- The RFP cover page lists Olivia Dillehay as the contact person. Proposals do **NOT** need to hand-delivered to Ms. Dillehay. Delivery to the ODSA Community Services Division reception desk is acceptable. **Request that the proposal be date and time stamped in.**

Section 1.1 Intro and Background

- EPP was developed to decrease electric consumption for PIPP + clients
- Ultimately helps control the level of the USF rider
- ECM's installed during energy audit must have an SIR of 1.0 or greater
- Action Plan must be developed for all clients
- All EPP weatherization work must meet the OWPS

Section 1.1 (continued)

- Funding will be allocated based upon eligible population in service territory
- The following funding totals will be made available for 2013 PY

Utility	Total Funding
AEP	\$6,092,733
Duke	\$415,130
DP&L	\$1,930,683
FE	\$3,184,709
Total	\$11,623,255



Section 1.2 Scope of the Project

- PY 2013 runs August 1, 2013 through June 30, 2014
- EPP has two levels of service and providers are expected to deliver both services where eligible
 - High Use Baseload
 - Baseload Plus Weatherization



Section 4.0 General Proposal Requirements

4.1 Past Performance and Agency Standing

4.1.1

- Describe any civil or criminal action brought against your organization or its individual staff members and any sanctions or special contract conditions that have been imposed by any funding source in the past 3 years.
- Disclose any open investigations by federal or state oversight and any grants willingly or forcefully revoked within the past 10 years.

Section 4.0 General Proposal Requirements (continued)

4.1.2

Describe and explain the accounting system that will be used to track funding and expenditures related to this award.



Section 4.0 General Proposal Requirements (continued)

4.1.3

- Provide an organizational chart for your entire organization.
- Identify all programs operated by your organization.
- Discuss how EPP fits within the structure or what changes will be made to accommodate the program.
- Describe the organization's management philosophy.
- Has Provider undergone any changes in its organization structure within the last 18 months? If yes, please describe.
- Is any change in ownership or organizational structure currently under review or being contemplated? If yes, please describe.

Section 4.0 General Proposal Requirements (continued)

4.1.4

- Provide resumes describing the educational and work experiences for each of the key administrative staff members who will be assigned to or paid from the project, including all administrative staff



Section 4.0 General Proposal Requirements (continued)

4.1.5

- Submit all single-agency (and Development Audit Reports, if a current provider) and accompanying management letters concerning your most recent audit for your organization.
- Submit the most recent financial statements approved by the entity's governing body

Section 4.0 General Proposal Requirements

4.1.6

- Describe your organization's procurement policies for EPP. Agencies must own EPP inventory. Please describe your plan to comply with this standard.
- Copies of all contractor certifications, training, and other necessary documentation.



Section 4.0 General Proposal Requirements

4.1.7

- Provide information about the organization's experience in working with and providing services to low-income and low-to-moderate income households or groups.
- State the number of years the organization has held each contract for service.
- Discuss any accommodations or adaptations made to effectively serve these population segments.

Section 4.0 General Proposal Requirements

4.2 Memorandums of Agreement

- List all entities (nonprofit, for profit, governmental, etc.) with an agreement in place to provide services. MOAs should clearly define the relationship and responsibilities of each entity and must state, at the minimum, the name and contact person for each entity, contact information, terms of the agreement, procurement and equipment/tools agreements in place and terms for reimbursement from the provider awarded these funds.
- All MOAs must be attached and signed by the Executive Director and Board of Directors of each organization. The provider is accountable to Development for the proper expenditure of funds.

Section 4.0 General Proposal Requirements

4.3 Contracted Services and Supplier Diversity – Minority Business Program

- Provide a list and contact information for all proposed private contractors expected to carry out administrative or support functions for EPP. Please state if any contractors or vendors intended to be used by the applicant are certified MBE or EDGE businesses.

Section 5.0 Technical Requirements

5.1 Technical requirement 1

- Provide information describing your experience in conducting energy conservation measures, housing rehabilitation/renovation, weatherization or similar activities in the last five years.
- Describe the approach to dealing with site work, whether subcontracted or performed by the applicant's employees. Explain if this work continues to be conducted or if the program is not currently operated. If the program is not currently operated, explain why it was terminated.

Section 5.0 Technical Requirements

5.1 Technical Requirement 1 (continued)

- Provide specific information on how jobs were/are tracked to manage the flow of work, scheduling of subcontractors and inspections. Identify how this information is used to plan for and manage production.
- Provide information that demonstrates how you assure quality control of staff and subcontractor work.
- Current providers may include the following for the past five years as a demonstration of program quality and effectiveness: actual units completed with EPP funding; information on KWH reduction; aggregate data from customer surveys; results of quality assurance plans; and any other pertinent data regarding quality of services provided.
- New applicants may provide letters of support from community partners and other pertinent data that demonstrates the requirements for this section.

Section 5.0 Technical Requirements

5.2 Technical Requirement 2a

- Provide a detailed plan that identifies the flow of work for a typical residential unit, beginning with customer contact and ending with **follow-up** customer contact and customer sign-off.
- Note each step of the process and how this will be managed for the different geographic regions of your county or counties.
- Describe your experience with OCEAN, Development's online database for gathering information for EPP, and how it will be used to manage the program or other data collection programs.

Section 5.0 Technical Requirements

Technical Requirement 2b

- Provide a detailed plan that identifies the flow of work for a typical residential unit, beginning with customer contact and ending with **final inspection** and customer sign-off.
- Note each step of the process and how this will be managed for the different geographic regions of your county or counties.
- Describe your experience with OCEAN, Development's online database for gathering information for EPP and how it will be used to manage the program, or other data collection programs.

Section 5.0 Technical Requirements

Technical requirement 3

- Provide a start-up plan identifying the stages to implement the program, including but not limited to the resources to be acquired (staff, equipment, subcontractors, etc.) and the timetable proposed for start-up.



Section 5.0 Technical Requirements

Technical requirement 4

- Provide a work plan, which includes as a minimum the following information for the county(s) in this application:
 - How work will be done – crews, subcontractors or a combination
 - How work will be coordinated
 - How initial customer contact will be done
 - What tasks will be included during the energy audit/home assessment
 - How the work order will be generated and work assigned
 - How the progress of work will be monitored
 - How completion of work/delivery of appliances will be determined
 - How follow-ups will be done
 - How will call-backs be handled

Section 5.0 Technical Requirements

Technical requirement 5 Staff duties and qualifications.

- Provide resumes describing the educational and work experiences for each of the key program delivery staff who will be assigned to the program, including the Energy Coordinator and all auditors/inspectors.
- Include any staff trained to provide consumer education and the educational attainment level for all auditor/inspectors.
- If positions are vacant, provide the job description and hiring criteria. In addition, provide job descriptions for all jobs related to program delivery.
- Provide an organization chart for the EPP.

Section 6.0 Preference

6.1 Preference for current providers

- 50 points will be added to applications from current providers of EPP funded by Development.
- State the counties currently served and the number of EPP (baseload and B+Wx) jobs done under the current grant for each county by utility.
- Clearly state any new counties requested as service territories.
- Applicants with no previous experience in EPP may mark this section “not applicable.”

Section 7.0 Payment Requirements

7.1 Payment Requirements

- Agencies awarded contracts must enter the budget and all financial information electronically using OCEAN.
- All requests for reimbursement must be for expenditures identified as allowable by program standards (the price list).
- Requests for payments are submitted monthly through the on-line OCEAN reporting system.

Section 8.0 Required Forms/Attachments

- The following forms must be completed and submitted with the proposal in accordance with the instructions given in Section 2.4. Blank forms are provided.
 - **ATTACHMENT A:** Grant Agreement (for reference only)
 - **ATTACHMENT B:** Financial Reimbursement Forms (701, 702, Generated Income)
 - **ATTACHMENT C:** Contact Information Form
 - **ATTACHMENT D:** Organizational Chart and (if applicable) List of Board Members and Affiliations
 - **ATTACHMENT E:** Certificates of Liability Insurance for applicant
 - **ATTACHMENT F:** Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion
 - **ATTACHMENT G:** Certification of Compliance with Government-Wide Guidance of Lobbying Restrictions and a Standard Form LLL, Disclosure of Lobbying Activities
 - **ATTACHMENT H:** Cover Page in PDF-fillable format
 - **ATTACHMENT I:** EPP Price List
 - **ATTACHMENT J:** OCEAN Appliance Spreadsheet

Section 3.0 Bid Evaluation Process

3.1 Preliminary evaluation and key considerations

- Full proposals will be reviewed initially to determine if mandatory requirements for documentation are met.
- If no qualified applications are received, the area will then be re-bid for 15 days in open competition.
- Previous applicants would be eligible to re-submit during this time and include missing documentation or correct deficiencies.

Section 3.0 Bid Evaluation Process

3.2 Proposal scoring

- Accepted proposals will be reviewed by an evaluation committee and scored against the evaluation criteria.
- An applicant may not contact any member of the evaluation committee except at the direction of the state.
- The evaluation committee's scoring will be tabulated and averaged and the proposals ranked based on the averaged numerical scores received.
- Current providers in each county will receive 50 points preference in the application.

Section 3.0 Bid Evaluation Process

3.3 Evaluation criteria

The following criteria will be used to score each proposal:

Description	Points
1. 4.0 General proposal requirements (POSSIBLE TOTAL 300 POINTS)	
4.1.1 Past Performance and Agency Standing	50
4.1.2 Accounting System and Description	25
4.1.3 Organization Chart and Description	25
4.1.4 Personnel/staffing	75
4.1.5 Audit and Financial Reports	25
4.1.6 Procurement	25
4.1.7 Experience with low income households	75
2. 5.0 Technical requirements (POSSIBLE TOTAL 300 POINTS)	
5.1 Experience in installing Energy Conservation Measures	75
5.2 Work Flow	50
5.3 Start-up Plan (not required for current providers)	75
5.4 Operational Plan	50
5.5 Staff duties/qualifications	50
3. 6.0 Preference Points (POSSIBLE TOTAL 50 POINTS)	
6.1 Current provider of EPP services in county	50
Total:	650

Section 3.0 Bid Evaluation Process

- The evaluation committee must award at least 350 points (including the preference points, if applicable).
- A proposal that receives fewer than 350 points will be ineligible for further consideration and the requested territory will be re-bid as detailed in section 3.1 if there are no qualified bidders for that territory.

RFP Timeline

DATE	EVENT
May 3, 2013	RFP available
May 10, 2013 10 a. m. EDT	Bidders' Meeting
May 20, 2013 5 p.m. EDT	Deadline to submit questions
May 24, 2013	Answers returned
June 7, 2013 4 p.m. EDT	Deadline to submit proposals
July 1, 2013	Announcement of successful applicants
July 8, 2013	Funding Agreement mailed for signature

Questions?

