



RFP 2020 HeatSmart Orange

HeatSmart Request for Proposals (RFP)

For the installation of air and ground source heat pumps and energy efficiency measures in Orange County, NY

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Proposal Due Date: 3/5/2020

Issued by: Energy Improvement Corporation (*Energize NY*)

RFP point of contact: Carolyn Cassata CarolynC@EnergizeNY.org

About This RFP

This RFP forms the basis of our selection process for installer partners for HeatSmart Orange 2020. The core RFP provides background information about the HeatSmart Program and expectations that apply to all future installer partners. The required template for proposals with instructions of how to fill it out can be found in Attachments A, B, C and D.

1. OVERVIEW OF PROGRAM AND GOALS

HeatSmart Orange is a community-based outreach, education, and group-purchasing campaign led by Energize NY, that will encourage the adoption of air-source heat pump (“ASHP”) systems, ground-source heat pump (“GSHP”) systems and home energy efficiency upgrades. HeatSmart Orange launched in March 2019 for the municipal coalition of Warwick (including villages and hamlets). This RFP is for the second HeatSmart campaign in Orange County.

Energize NY is releasing this REQUEST FOR PROPOSAL (“RFP”) for installers of home energy efficiency and clean heating and cooling technologies to provide installation services to homes and businesses in Orange County as part of HeatSmart Orange, a NYSERDA-funded effort.

Energize NY is seeking at least one installer (may select multiple Installers) to work closely with the HeatSmart Orange team on the second campaign to serve as a trusted campaign partner, co-market and install relevant clean heating and cooling technologies and expand awareness of these technologies over the course of the program.

Energize NY invites proposals from businesses (“Installers”) that have the ability and capacity to design and install ASHPs and / or GSHPs. The selected Installer(s) will work collaboratively with the HeatSmart Orange team to design and implement a community marketing and outreach campaign, which is expected to commence in April 2020. The selected Installer(s) will be the sole recipients of customer leads through HeatSmart Orange and will be actively promoted by the community as HeatSmart Orange’s competitively selected Installer(s). The first campaign, HeatSmart Warwick, resulted in approximately 160 leads through the program to date.

2. ABOUT HEATSMART ORANGE

The Energize NY Residential Department operates inside of Energy Improvement Corporation (EIC), a New York State non-profit, local development corporation. Energize NY Residential provides homeowners with useful information, educational events and the support to navigate the NYSERDA programs; and has dramatically increased awareness of and demand for energy efficiency upgrades since its founding in 2011 in Westchester, Dutchess, and Orange Counties. The HeatSmart Orange team is led by Energize NY with financial support from the New York State Energy Research and Development Authority (NYSERDA) Clean Heating and Cooling Communities Program.

HeatSmart community campaigns are volunteer-led outreach campaigns, supported by local sustainability groups and municipalities. The HeatSmart Orange team consists of Energize NY staff and HeatSmart volunteers. Through the program, HeatSmart Orange will assist local communities in offering high quality, competitively priced energy solutions and clean heating and cooling (CH&C) installations from vetted Installers to building owners in Orange County.

3. SUMMARY OF CAMPAIGN ACTIVITIES

The objective of the HeatSmart Orange Program is to significantly ramp up the rate of CH&C system adoption and energy efficiency solutions in Orange County by creating and servicing a demand for clean energy options in home heating and cooling.

A successful HeatSmart Orange Campaign will encourage as many homeowners as possible to work with the selected installer(s) to install CH&C systems and adopt energy efficiency measures, leveraging committed and well-connected volunteers and community leaders to identify creative and effective ways to get the word out to their community about HeatSmart Orange. Volunteers and the HeatSmart Orange team will work collaboratively with the selected installer(s) on a variety of tailored outreach approaches.

The success of the Solarize, Energize, and similar programs inspired the HeatSmart Orange Program. For examples of other community-based CH&C programs, see the HeatSmart CNY program in Central New York and HeatSmart Tompkins program in Tompkins County, NY or visit <https://www.nyserda.ny.gov/All-Programs/Programs/Clean-Heating-and-Cooling-Communities> for more information.

4. INSTALLER ELIGIBILITY

At a minimum, Installers submitting a response to this RFP must meet the following eligibility requirements to participate in this HeatSmart Orange Campaign:

1. Hold all relevant licenses and other requirements for the jurisdiction(s) served by the HeatSmart Orange Campaign.
2. Meet eligibility requirements for or be approved as a participating Installer in at least one of the relevant NYSERDA program opportunities:
 - a. Ground Source Heat Pump Program (for GSHP Installers) Visit - <https://www.nyseda.ny.gov/All-Programs/Programs/Become-a-Contractor/Renewable-Heating-and-Cooling/Ground-Source-Heat-Pump-Installers> and/or
 - b. Air Source Heat Pump Program (for ASHP Installers). Visit – <https://www.nyseda.ny.gov/All-Programs/Programs/Air-Source-Heat-Pump-Program>
3. Have completed a minimum of 20 GSHP **or** 50 ASHP installations within New York State.
4. Submit a complete proposal containing all required information described in “Section 7. Proposal Requirements” on or before **March 5, 2020 by 5:00pm.**

5. SCOPE OF SERVICES

The scope of services to be provided by Installers participating in the HeatSmart Orange Program are as follows:

Outreach and Education: Participating Installers will be responsible for working closely with the HeatSmart Orange team to directly support marketing and outreach activities to promote awareness of the HeatSmart Orange Campaign. This may include:

- Collaborating with the HeatSmart Orange team to refine the campaign marketing strategy and activities prior to the launch of the campaign and over the course of the campaign;
- Participating in 4-6 in-person educational “meet the Installer” and other public events, where the Installer will have the opportunity to meet and collect sign-ups from customers;
- Working with the HeatSmart Orange team to ensure that campaign staff and volunteers are familiar with the Installer’s technology, operations, and workflow;
- Addressing inquiries from prospective customers and the HeatSmart Orange team;
- Providing information to prospective customers about relevant technologies, incentive programs, and other initiatives supported by the HeatSmart Orange Program;
- Supporting other relevant marketing, outreach, and educational activities (e.g. providing content for marketing materials, developing stories, etc.).

Site assessments and installations: Participating installers will conduct outreach and provide information to customers, conduct site assessments, and provide installation services for relevant clean heating and cooling technologies.

- Conducting outreach to customers to screen customer suitability for relevant technologies;
- Providing assessments to evaluate a site’s suitability for relevant technologies, including any structural, electrical, or mechanical issues;
- Completing heating / cooling load calculations (e.g. Manual J) using industry best practices and ACCA-approved software, if applicable;
- Providing pricing quotes to customers promptly after completion of a site visit, which shall reflect pricing consistent with information provided in the Installer’s Pricing Proposal;
- Providing information to customers about all relevant incentives, as well as basic information on system financial analysis and energy savings potential;
- Installing relevant technologies that meet the minimum requirements for eligibility for relevant NYSERDA incentive programs, including the Ground Source Heat Pump Program and Air Source Heat Pump Program;
- Providing turnkey contracting, permitting, installation, and all other activities associated with the sales and installation process within one year of contract signing, unless mutually agreed upon with the customer;
- Completing incentive paperwork and providing support for completing financing paperwork (if applicable) for all customers who sign contracts;
- Providing clear communication to customers about installation timeline, expected pricing, and any anticipated delays.

Quality Control: HeatSmart shall have permission from businesses to conduct quality assurance surveys on any work associated with HeatSmart leads.

Lead Management and Reporting: Participating Installers will manage customer leads, track data on leads, and work with the HeatSmart Orange team to provide regular reporting so that the HeatSmart Orange team and NYSERDA are apprised of the status of customers participating in the program. This shall include:

- Tracking and managing leads to provide timely customer service to all interested leads;
- Developing a process in collaboration with the HeatSmart Orange team and other Installer(s) to manage leads that are not suitable for the technology and, if relevant, share leads with other Installer(s) if the site is not suitable for the Installer's technology;
- Providing contact information for leads generated during the course of the campaign with the HeatSmart Orange team;
- Providing data on lead status on a bi-weekly basis to the HeatSmart Orange team;
- Participating in bi-weekly calls with members of the HeatSmart Orange team

6. RFP AND PROGRAM TIMELINE

Please note that dates provided below are estimates and subject to change.

RFP / Program Milestone	Date
RFP released	February 13, 2020
Written questions due	February 26, 2020
Answers to RFP Questions Released, at latest	February 28, 2020
Proposals due	March 5, 2020
Installer Interviews, Installer Partner Selection	March 9 - 20
Installer(s) announced	March 24, 2020
Installer(s) – Community Team Meetings	Week of March 30
Campaign launch	Mid-Late April
Campaign public outreach and education events	April – October, 2020
Deadline for participants to sign contracts	October 30, 2020
Deadline to complete installations contracted through HeatSmart Orange	December 15, 2020

7. PROPOSAL REQUIREMENTS

Proposals must include the following documents:

- **Proposal Checklist (Attachment A)**
- **Individual Application Form (Attachment B):** If you are submitting a proposal as a team with multiple Installers, each participating Installer must complete this application.
- **Core Proposal (Attachment C)**
- **Pricing Proposal (Attachment D)**

If selected for an interview, Applicants may be asked to provide supplemental information at the request of the HeatSmart Orange team.

8. APPLICATION INSTRUCTIONS

Written questions and applications may be submitted to Carolync@EnergizeNY.org by **February 26, 2020.**

All proposals must be received by 5pm on March 5, 2020.

Late proposals may be rejected without review by the HeatSmart Orange team's selection committee.

9. EVALUATION CRITERIA

To be evaluated by the HeatSmart Orange selection committee, the Applicant must meet all eligibility requirements described in “Section 4. Installer Eligibility.” Proposals that do not include all required information may not be reviewed by the selection committee at its sole discretion.

Proposals will be evaluated by the selection committee in accordance with the criteria listed below. Additionally, a select number of applicants will be invited to interview with the selection committee:

- **Overall quality and value:** Overall quality of the proposal and approach to supporting the HeatSmart Orange program.
- **Experience:** Degree of Installer’s experience and proficiency in the scope of work, including demonstrated experience in developing, designing and installing all relevant technologies included in the Installer’s proposal, record of customer service, and experience working within the region to be served by HeatSmart Orange.
- **Outreach and marketing plan:** Quality of proposed outreach and marketing activities including demonstrated familiarity with local community.
- **Collaboration:** Willingness and ability of the Installer to collaborate with the HeatSmart Orange team and any other selected Installer(s) (if applicable) to implement a successful outreach and education campaign focused on all relevant technologies.
- **Capacity and implementation:** Ability to provide timely, quality customer service and installations throughout the duration of the program, as well as ability to work with the HeatSmart Orange team. Ability of Installer(s) to educate customer on benefits of technologies and communicate options available.
- **Pricing proposal:** Quality, simplicity, clarity, and value of the proposed equipment, price adders, and contract terms
- **Interview:** Quality of responses to interview questions