



04.19.24

## Request for Proposal

Delmarva Power MD

Small Business

Quick Energy Check-up  
(QEC) Service

Contractors



# Request for Proposal

DELMARVA POWER MD SMALL BUSINESS QUICK ENERGY CHECK-UP SERVICE CONTRACTORS

## Contents

1.	INTRODUCTION.....	5
2.	SMALL BUSINESS PROGRAM DESCRIPTION.....	9
2.1	Program Summary.....	9
2.2	Program Rationale.....	9
2.3	Participation Pathways.....	10
2.4	Participation and Energy Reduction Targets.....	11
2.5	Program Target Market and Technologies.....	11
2.6	Program Launch.....	13
2.7	Program Delivery Software and Tracking System.....	13
2.8	Contractor Performance Expectations and Data Accuracy.....	14
3.	SCOPE OF SERVICES.....	17
3.1	Administrative services.....	17
3.2	Marketing the Program.....	17
3.3	Performing Check-ups.....	17
3.4	Presenting Proposals and Securing an Agreement to Proceed.....	18
3.5	Arranging Installations.....	18
3.6	Tracking, Reporting, and Invoicing.....	19
3.7	Work Standards and Warranties.....	19
3.8	Training and management meetings.....	20
3.9	Customer Incentives, payment terms, and financing.....	20
4.	GENERAL PROPOSAL REQUIREMENTS.....	22
5.	PROPOSAL EVALUATION.....	24
6.	MISCELLANEOUS.....	25
6.1	Program Agreement Terms.....	26
6.2	Confidentiality.....	26

6.3 M/V/W Diverse Business Enterprises (DBE)..... 26

6.4 MD-Based Businesses ..... 26

6.5 Termination Right of MDEA ..... 26

6.6 Termination Right of Contractor ..... 26

Appendix A: Examples of Provided Marketing Materials..... 28

## REVISIONS

Revision Number	Section	Description
0	n/a	Release

# Introduction

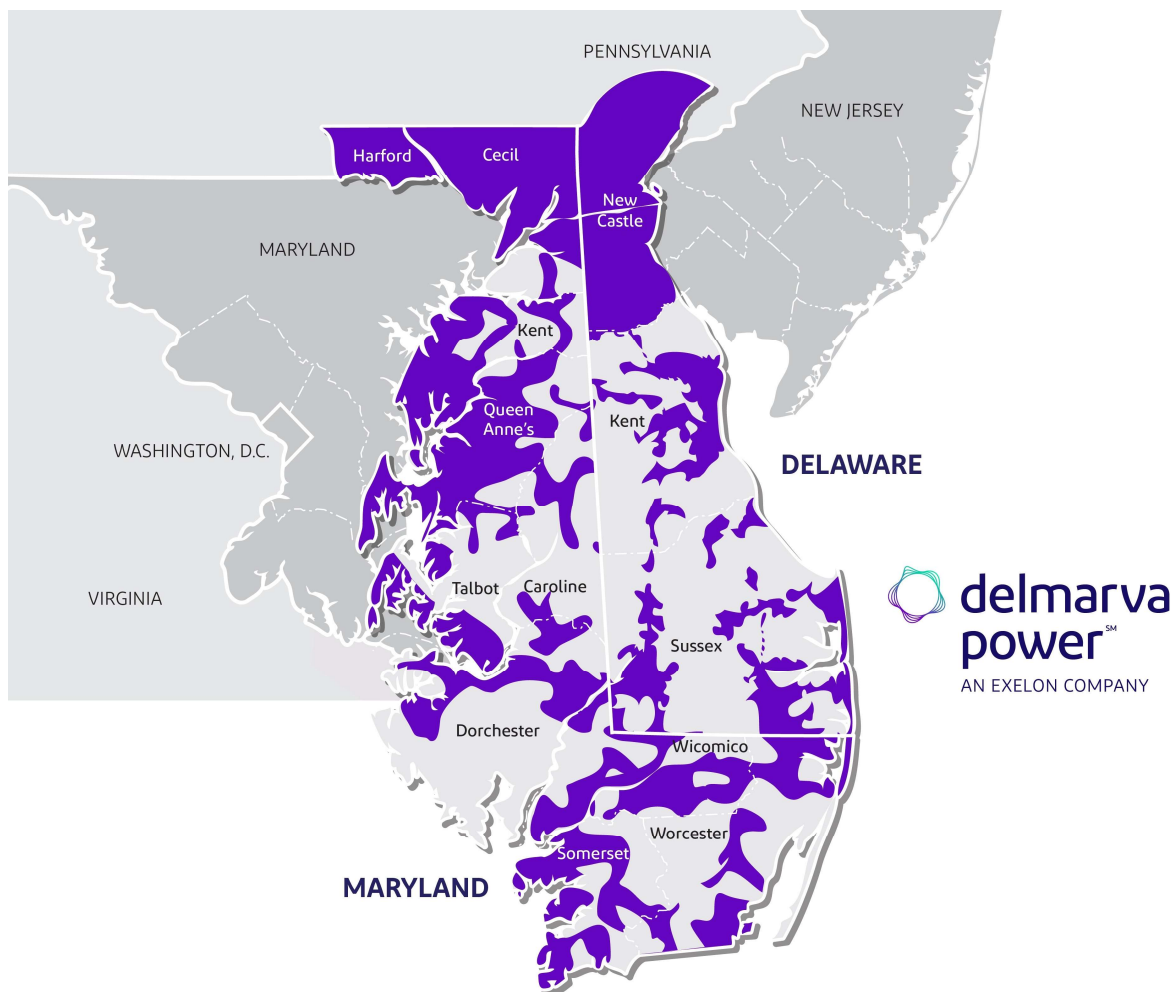
01



# 1. INTRODUCTION

MD Energy Advisors (MDEA) is seeking proposals from qualified contractors (Contractors) through this request for proposal (RFP) to deliver Quick Energy Checkups (similar to ASHRAE Level 1 audits) and direct installation services for the Delmarva Power and Light Company (Delmarva) Small Business Program in Maryland for program years 2024-2026. The Program targets electric energy retrofit opportunities for Delmarva Small Business Commercial Customers (monthly billing demand is less than 100 kW and in occupied facilities located in the counties of Caroline, Cecil, Dorchester, Harford, Kent, New Castle Queen Anne's, Somerset, Sussex, Talbot, Wicomico, and Worcester. Contractors will conduct on-site energy assessments, analyze energy usage, provide energy-saving recommendations, and install energy-efficient devices at minimal cost to the customers.

The map below illustrates Delmarva's service territory for electric services in the counties listed above.



In 2024, Delmarva will launch its sixth three-year program cycle to implement a suite of conservation and energy efficiency programs to provide Residential, Small and Large Commercial Industrial (C&I) customers with energy and cost saving opportunities in Maryland. These programs are offered through EmPOWER Maryland and will continue to allow Delmarva to make significant contributions to Maryland's energy efficiency goals. To achieve their goals, Delmarva has selected ICF and MDEA to assist in the Program design, implementation, and management of the Small Business Program. ICF's and MDEA's experience and proven approach in managing conservation programs for numerous utilities throughout the United States positions them to successfully deliver programs to Delmarva customers utilizing industry best practices.

Through this solicitation process, MDEA is requesting proposals from qualified Contractors to provide energy assessment and direct installation services to support the Quick Energy Checkup feature for program years 2024-2026. For the purposes of responding to this RFP, **Bidders are required to demonstrate their qualifications and experience in providing the following turnkey implementation services to small business customers:**

- **Check-ups and Direct Install:** Supplying trained energy auditors to complete the Quick Energy Check-ups, review the results with customers, make energy reduction recommendations, and provide direct installation of select measures as applicable.
- **Project Management:** Organizing and facilitating Quick Energy Check-ups and installation of applicable direct install measures, including ordering, purchasing, maintaining inventory of materials required for measure installations, providing licensed electricians and other trades as necessary for installation and commissioning, and communicating with MDEA and the Customer throughout the visit.
- **Customer Service/Problem Resolution:** Supporting MDEA program staff in resolving customer issues by providing a point of contact, remaining involved in the resolution process, and implementing the agreed upon remediations.
- **Administrative Services:** Providing administrative staff for managing pipeline check-ups, completing program documentation, and gathering required documentation such as customer signatures.
- **Project Lead Generation:** Identifying and providing a warm transfer for additional projects that will allow Customers to fully participate in and leverage other savings opportunities offered through the Small Business Direct Install program.
- **Call Center Services:** Providing appropriate telephone services and staff during normal business hours to respond to direct customer inquiries.
- **Data Management:** Managing all Customer, MDEA, and ICF data according

to the requirements outlined in this RFP.

Requirements for each of these services are described in detail in **Section 3.0**

**Scope of Work.**

It should be noted that, while the Program is approved by the Maryland Public Service Commission (PSC) for the 2024-2026 program cycle, the Program may incur changes subject to the outcome of PSC directed work groups and potential subsequent future Orders from the PSC. As a result, Delmarva and MDEA reserve the right to modify subcontracts as a result of such parties' actions.

In addition, Delmarva and MDEA encourage registered minority, veterans, and women-owned businesses to participate in this opportunity as Diverse Business Enterprises (DBEs). Respondents must provide documentation of such status to be considered a DBE. It is our policy that DBEs shall have the maximum practicable opportunity to participate in the performance of contracts. However, this policy shall not be used to exclude qualified non-DBEs from participating in this opportunity. The awarded company is encouraged to fully carry out this policy in the award of subcontracts consistent with the efficient performance of this contract.

Should you have any questions regarding this RFP, you may submit them to the MDEA team directly at [procurementteam@mdenergyadvisors.com](mailto:procurementteam@mdenergyadvisors.com). Questions will not be accepted after May 3, 2024.

# Small Business Program Description

02





## 2. SMALL BUSINESS PROGRAM DESCRIPTION

### 2.1 Program Summary

The Small Business Program is a direct install program that offers customers the opportunity to retrofit existing equipment with more energy efficient technologies. The Program targets discretionary retrofit opportunities among existing commercial customers in Maryland occupying buildings with an average billing demand of less than 100 kW per month.

The Program seeks to identify cost-effective efficiency retrofit opportunities in eligible customer sites. It provides energy assessments, direct installation, financial incentives, education, and other strategies to encourage the early replacement of existing equipment with high efficiency alternatives. The Program has a primary emphasis on lighting, refrigeration, and HVAC efficiency upgrades, although other end uses, and equipment are considered.

### 2.2 Program Rationale

Delmarva recognizes there is large potential in the small commercial sector based on its experience as an electric utility operating in Maryland. Many small commercial customers have minimal opportunity (educational or financial) to consider energy efficiency in operating their businesses. As such, the Small Business Program was designed to better serve small business customers.

Specific customer barriers include:

- Business owners and operators without the technical expertise or time to devote to energy efficiency improvements,
- The diversity of the small commercial sector in terms of business types,
- The involvement of diverse populations, and
- Limited access to financial resources to make investments in efficiency upgrades.

These barriers often prevent participation in utility-sponsored programs geared toward larger or more generalized commercial and industrial markets. Because small commercial and industrial customers generally face high transaction costs for efficiency projects and limited savings potential, they are not targeted by most energy service companies.

The Program is designed to overcome these barriers by providing significant financial incentives and a streamlined process for identifying and installing targeted improvements. In this context, the ability of the selected Contractor(s) to demonstrate an ability to provide first-class customer service is crucial.

## 2.3 Participation Pathways

The Program offers two primary participation pathways for customers:

### 1. Quick Energy Check-Ups

The Quick Energy Checkup pathway offers no-cost energy assessments to Customers. For participants in this pathway, energy auditors conduct a walk-through energy assessment, collecting information such as existing equipment specifications, current energy usage, operating patterns, and propensity for energy efficient upgrades. The collected information is documented through program-provided forms and/or tools. These tools will provide a brief report summarizing the findings of the assessment.

The outcome(s) of the assessment may include recommendations for:

- **Commissioning Measures** – No-cost measures that either result in a reduction of energy consumption or promote participation in other program opportunities. Examples of no-cost measures include installing reminders for employees to turn off lights when spaces are not in use and educating Customers on Small Commercial Demand Response participation opportunities.
- **Direct Install Measures** – Low-cost measures that result in a reduction of energy consumption. Examples of low-cost measures include installation of advanced power strips, smart thermostats, worn gaskets, and weather stripping.
- **Efficiency Projects** – Full or partial system upgrades and replacements. Examples of efficiency projects include kitchen and refrigeration appliance replacements, lighting system upgrades, and lighting system retrofits.

Upon completion of the Quick Energy Checkup, energy auditors review the assessment findings with the Customer and implement commissioning and low-cost direct install measures as applicable. If opportunities for efficiency projects are identified, the energy auditor will coordinate with MDEA and/or its contractors to facilitate a warm transfer of the project opportunity to the Program's Direct Installation participation pathway.

### 2. Direct Installation Services

The direct installation pathway implements a turnkey process that offers customers a single source of information, technical assistance, and financial incentives. The Program will implement this participation pathway through a network of direct installation contractors, for which a separate request for proposals was issued. The contractors selected through that direct installation solicitation will deliver the following services:

- Identifying eligible customers and conducting sales calls to describe the program's financial benefits,

- Performing site visits, collecting all equipment and energy data, identifying efficiency opportunities, performing analyses, and making recommendations to customers,
- Presenting recommendations to the customer and obtaining customer agreement to proceed with the installation,
- Procuring and inventorying the required equipment and arranging for installation of eligible measures by licensed electricians and other trades as necessary,
- Tracking all levels of Program activity in accordance with prescribed protocols through a Program data management system to be provided by MDEA,
- Providing follow-up warranty and customer service to resolve any issues that arise during or after the installation.

Customers may participate in both pathways (Quick Energy Checkup and Direct Installation Services) or only one of the two pathways. Quick Energy Checkups are encouraged, but not required, for Small Business Customers to qualify for the enhanced incentives and financing offered by the Small Business Program.

#### 2.4 Participation and Energy Reduction Targets

As filed with the Maryland Public Services Commission, the estimated 2024-2026 Program participation targets and energy savings goals are provided in Table 1. These numbers are provided solely for illustrative purposes.

*Table 1: Delmarva Maryland Participation and Energy Reduction Targets*

	2024	2025	2026	Cycle
Participation	1,081	1,081	1,081	3,242
MW	1.54	1.53	1.53	4.60
MWh	11,486	11,454	11,454	34,394

To assist in reaching these goals, Contractors will be assigned Program targets to measure performance in several key areas including, but not limited to number of completed energy assessments, quality of completed energy assessments, quality of implementation for commissioning and low-cost direct install measures, rate of energy efficiency project opportunity identification, kW & kWh savings, and reporting accuracy.

#### 2.5 Program Target Market and Technologies

The Program targets eligible small commercial customers with average monthly billing demand less than 100 kW in occupied buildings throughout the Delmarva Maryland service area.

While considering innovative and best practice approaches to motivate small businesses, providing turnkey services are critical. Turnkey programs (e.g. direct installation programs) are designed to have all program aspects, from initial marketing and ensuing energy assessment process through final equipment installation, conducted by third parties. Thus, Program participants are not responsible for the application process, hiring Contractors or developing project specifications. Features of the Program include:

- A turnkey approach through qualified Contractors
- Generous incentives to motivate participation
- An easy participation process for Customers
- Stability for participating Contractors
- Minimized transaction costs for Customers, Contractors, and Delmarva.

The Small Business Program offers comprehensive services and targets end-uses that are common in most small businesses. The most common technologies installed for the Program participation pathways are provided in Table 2 and Table 3:

*Table 2: Common Measures for Quick Energy Checkup Service Contractors*

<b>Commissioning Measures</b>
<ul style="list-style-type: none"> <li>• Check and adjust thermostat’s programmable settings (per thermostat)</li> <li>• Activate energy-saving features of computers, monitors, and copiers (per computer)</li> <li>• Install reminder signs to turn off lights when not in use and in daylighted areas</li> <li>• Check and adjust water heater thermostat’s settings to 115°F - 120°F range if dishwashing is not a factor</li> <li>• Clear blocked supply and return air distribution vents</li> <li>• Clean exposed/accessible condenser coils associated with A/C and refrigeration units</li> </ul>
<b>Low-Cost Measures</b>
<ul style="list-style-type: none"> <li>• Install efficient air filters</li> <li>• Install "Smart Strips" for computer equipment and associated multiple plug-in loads</li> <li>• Add external insulation blanket to electric water heater</li> <li>• Replace worn weather stripping on exterior doors</li> <li>• Installation of smart/connected thermostat</li> <li>• Installation of vending machine controls</li> </ul>

*Table 3: Common Measures for Direct Installation Service Contractors*

<b>Lighting Measures</b>
<ul style="list-style-type: none"> <li>• Retrofit or replacement of existing T12 and T8 fluorescent fixtures with linear LED lamps (TLEDs) and ballast, retrofit kits and fixture technologies</li> <li>• Relamp of past program installed T8 lamps with TLEDs</li> </ul>
<b>Lamp and Ballast Technologies</b>
<ul style="list-style-type: none"> <li>• Replacement of interior high-intensity discharge (HID) fixtures with Hi-Bay LED lamps or fixtures</li> <li>• Relamp past program installed T5HO lamps with TLEDs</li> <li>• Conversion or replacement of non-LED exit signs to LED units</li> </ul>

- Replacement of exterior high intensity discharge (HID) and incandescent area lighting fixtures with LED lamps or fixtures
- Installation of lighting controls (e.g., photocells, timers, and occupancy sensors)
- LED cooler lights

### **Non-lighting Measures**

- Smart thermostats
- Installation of HVAC replacement and tune-up measures including:
  - Split and packaged system AC and heat pump tune-ups
  - Split and packaged unitary system AC and heat pump replacements
  - Mini-split systems replacements or upgrades
  - Packaged and vertical terminal unit replacements
- Installation of refrigeration control technologies and efficiency measures including:
  - EC motors
  - Evaporator/compressor controls
  - Door gasket and strip curtain installation or replacement
    - Anti-sweat heat controls
  - Open display case door retrofits and night covers
- Heat pump water heaters
- Commercial kitchen appliances
- Consumer electronics and plug load controls
  - Smart strips
    - ENERGY STAR monitors
  - ENERGY STAR computers
  - ENERGY STAR imaging equipment

Delmarva may pay up to 80% of the total cost for eligible measures installed at a customer site upon completion of the Quick Energy Checkup or Efficiency Project. As described elsewhere in Section 3.9, certain installation-related costs will not be eligible for a Program incentive, and these must be billed directly to the customer by the Program Contractor(s). The Delmarva incentive for each project will be paid directly by MDEA to the Program Contractor(s) in accordance with the terms described in 3.9 Customer Incentives, payment terms, and financing.

## **2.6 Program Launch**

The Small Business Program launch will include the selection of Quick Energy Checkup Energy Assessment and Direct Installation Services Contractors. This solicitation is for the Quick Energy Checkup Energy Assessment Services; a separate solicitation was issued for the Direct Installation Service contractors. Contractors for both types of services will be selected based on a competitive bidding process for the labor and materials for each respective scope of work. As part of the competitive solicitation processes, labor and material costs will be fixed for the Program and will be consistent for all selected contractors.

## **2.7 Program Delivery Software and Tracking System**

MDEA has partnered with ICF to support program delivery software and tracking systems. The selected Contractor(s) will be provided with access to a field data collection tool as well as ICF's project management and tracking system ("ADI") for use in the Program. The tracking system is a single, integrated relational database package that allows the user to collect, store,

and retrieve data from intake to project completion and billing. A master customer file stores all basic information about a customer (name, address, telephone numbers, account numbers, e-mail address, etc.), and is supplemented by related data files which address “work order” status and measure data. Once a customer is entered in the master file, multiple work orders can be created for that customer to allow tracking of multiple stages or projects.

ADI is designed to specifically support a direct installation program like Delmarva MD’s Small Business Program. It offers full capability to provide comprehensive project pricing and energy savings calculations, along with standardized report options for both the customer and Delmarva/MDEA. ADI produces detailed material supply and installation labor requirements for each project to assist the user in pricing and managing each project.

Program experience has shown that direct, face-to-face contact with customers is the most effective method of informing customers of the Program, proceeding with the initial audit and completing commissioning and low-cost measures. Closure rate is higher when an auditor can generate a proposal on site. For the purpose of providing direct sales activity, selected Contractor(s) will require its field personnel to use wireless devices. The tablet PC mobile device must support HTML5 and CSS 3 and have a 4G connection. MDEA cautions against the use of iOS devices for the ADI tool due to their limitations on file uploading. The auditor will be able to collect data directly on the tablet, transmit the data into the ADI application, and produce a proposal on site. To support the use of the mobile-based tool, the Contractor must provide its own method of internet access via a cellular wireless enabled device. The Contractor shall be responsible for providing its own hardware and internet software.

The system produces activity files that will be regularly maintained in ADI. The files will also provide the necessary support documentation, such as invoices, to MDEA for Quick Energy Checkup assessments and installed measure summaries.

## 2.8 Contractor Performance Expectations and Data Accuracy

### Launch/Training

New Contractors selected for the Program will participate in Program launch and training activities. Launch and training activities will include reviewing Contractor staffing, program guidelines and expectations, and resources or tools. Additional training will be provided as needed, and selected Contractors will be expected to participate.

### Performance Expectations

Expectations of Contractor performance should be taken into consideration in the

bid. To achieve Program goals, performance expectations for the Contractor may include but are not limited to staffing, energy assessment scheduling, energy assessment completion, kW and kWh savings, audit completeness and accuracy, and quality of measure implementation metrics. The Program will provide a data collection tool to guide auditors through the checkup to collect desired site-level information and calculate energy savings for all energy-saving opportunities offered by the Program.

### **Accuracy of Contractor Data**

The success of the Program rests on the Contractor's commitment to providing accurate data throughout the process for all check-ups and installations. Required data will include but will not be limited to:

- Customer information including Delmarva account name, electric account number, facility address, contact name, telephone, email address, business type and other data,
- Audit data including description of existing equipment (e.g. lighting), wattage and hours of operation and proposed equipment, and
- Accurate kW and kWh savings estimates based on the difference between existing equipment and proposed equipment and hours of operation.

Contractors must provide sufficient administrative support to meet these standards and must meet MDEA's data protection and data security requirements.

# Scope of Services

03





## 3. SCOPE OF SERVICES

### 3.1 Administrative services

The Contractor will be responsible for providing administrative staff to perform routine Program support tasks including scheduling checkups, telephone coverage during normal business hours, customer relationship management, quality control of project data and invoices, data transfer for invoicing, and direct sales support. The Contractor will be required to have a telephone answering service with live response that provides access to emergency calls that may arise outside of normal business hours.

### 3.2 Marketing the Program

The Program will be primarily marketed by the MDEA team and selected Contractors. This direct marketing will be supplemented by more broadly based Delmarva print and broadcast marketing at times. However, The Contractor is also encouraged to market the program and generate assessment leads as part of their service delivery. The Contractor can use their list of customers to determine eligible customers within the service territory. MDEA will provide the Contractor with a database to look up eligible Delmarva electric customers. Fields include electric account number, customer/company name, address, city, state, zip code and county. The customer database is updated regularly.

The selected Contractor will be assigned project leads by the program team for customers interested in Quick Energy Checkups. The selected Contractor may also obtain leads through their own direct sales marketing and outreach efforts.

### 3.3 Performing Check-ups

The Contractor will be responsible for conducting an energy assessment at the customer's facility. Each assessment will include a complete inventory of all relevant systems at a customer's facility, for example including type, quantity, and wattage of existing fixtures, and their hours of operation. Inventories must be conducted in an organized manner that facilitates appropriate follow-up and quality control by other Program personnel.

Based upon the information collected during the energy assessment, the Contractor will recommend measures that meet minimum requirements for savings as set by the Program. To qualify an energy assessment as a complete Quick Energy Checkup, the contractor must:

- Implement at least three Commissioning measures,
- Implement at least two low-cost Direct Install measures, AND/OR
- Identify at least one opportunity for additional participation in Delmarva MD's Energy Savings for Business Programs (e.g. identify an Efficiency Project opportunity for the Small Business Direct Installation pathway, or

secure customer participation in the Small Commercial Demand Response Program).

Contractors are encouraged to identify and implement as more than the minimum required measures for each Quick Energy Checkup. The Program does not anticipate instituting an incentive cap for each Quick Energy Checkup but reserves the right to impose one should the need arise.

The data collected during each check-up, along with efficiency upgrade recommendations, will be entered into ADI or another tool provided by MDEA. This system will generate reports that summarize audit findings.

### 3.4 Presenting Proposals and Securing an Agreement to Proceed

The Contractor will be responsible for presenting the energy assessment report to the customer during the visit. The goal is to have the Customer consider the recommended improvements during the visit; thus, the Contractor is expected to explain the Program offerings and describe the customer's next steps to participating.

The Contractor is responsible for obtaining the customer's signature on a Program Participation Agreement to be provided by MDEA prior to implementation of any measures. Once the customer signature is obtained, the Contractor may proceed with the work agreed upon by the Customer.

### 3.5 Arranging Installations

The Contractor shall complete all installations in a proper manner and comply with any reasonable requests by the customer regarding the manner of performing the installations. The Contractor will attempt to install the measures in each Customer's facility at the time of the check-up; if this is not possible Contractor will have up to (30) business days of the customer signing the Participation Agreement. It is expected that installations will occur during normal business hours unless special arrangements are made by agreement of the customer and the Contractor.

The Contractor shall provide all equipment and materials to be used for Program installations. Contractors are encouraged to inventory an "on hand" supply of common measures and are encouraged to propose an aggressive inventory strategy. Contractors must secure inventory from sources that offer products at non-incentivized costs; products may not be purchased through any point-of-sale or distributor incentive programs or other means that would "stack" or "double dip" multiple EmPOWER incentives.

The Contractor is accountable for ensuring that all work complies with electrical, building, and safety codes. They must also ensure that all individuals, whether employed directly or subcontracted, who perform installations in the

Program are adequately trained or certified and obtain all required permits to conduct installations in accordance with local or state electrical code regulations.

The Contractor is responsible for preparing non-hazardous waste materials generated during the project, such as replaced components and related materials, for disposal by the customer. They must also ensure that each worksite is left tidy and organized, without adversely affecting the customer or business operations. Opting for good customer service, the Contractor may choose to remove the non-hazardous waste materials.

### 3.6 Tracking, Reporting, and Invoicing

The Contractor will update the ADI program tracking system on a regular basis. Electronic records will be maintained on ADI by an ICF server.

Invoicing of all completed projects will be accepted weekly. Electronic files will be created through ADI. Hard copy documentation of each completed project, including all back-up paperwork, signed Program agreements, and project completion forms should be retained at the contractor's facility. It is important the Contractor conduct a level of Quality Assurance (QA) necessary before submitting invoices and supporting documentation to minimize errors in data submitted. Errors with invoicing documentation could delay processing or have it denied invoices for payment to Contractor.

In order to perform these functions, Contractors will need to have available:

- High speed internet access
- Computers, including internet browser software such as Chrome, Internet Explorer
- Scanner and printer: Scanning equipment is needed to convert paper documents such as signed customer contracts to electronic files
- A company email address
- Phone and fax service
- Office materials including printer paper

### 3.7 Work Standards and Warranties

The Contractor shall ensure that all work will be performed by licensed personnel in a neat and workmanlike manner taking all reasonably necessary precautions to ensure a minimal impact to the customer's facility and operations. The Contractor and all subcontractors shall be professional and courteous in nature and shall execute the work in accordance with standard trade practices. The Contractor may subcontract the work performed; however, the Contractor shall be responsible for the acts and omissions of the subcontractor, as well as for the acts and omissions of any and all persons employed by the Contractor and its subcontractors.

If MDEA determines that any employee of the Contractor or its subcontractors has acted in an inappropriate or undesirable manner, MDEA shall notify the Contractor. The Contractor shall immediately take the necessary steps to remedy the problem, including the cancellation of any subcontractor agreements or the removal of any persons performing the substandard work.

The Contractor shall offer a warranty that any defect in design, manufacture, or installation found within one (1) year from the date of installation shall be remedied without charge and within a reasonable time by the Contractor. The Contractor shall assist customers with claims made under manufacturer warranties for failures that occur after a year following the installation. Contractors who proposed equipment with extended warranties and convenient customer access to resources to address warranty claims will be strongly preferred.

The Contractor will notify MDEA of any unusual and/or recurring customer equipment performance problems.

### **3.8 Training and management meetings**

The Contractor's Program staff will be required to attend Program training sessions held at MDEA's discretion. At minimum, Contractors should expect to attend a Program kick-off meeting to review Program guidelines and to introduce the ADI tracking system prior to beginning the delivery of Program services. The Contractor's Project Manager will be required to attend periodic, typically quarterly, Contractor production meetings at MDEA's office.

### **3.9 Customer Incentives, payment terms, and financing**

Since incentive levels have always driven program participation, Delmarva will offer incentive levels that cover up to 80% of the total installed cost for eligible program measures. The Contractor will be responsible for collecting the balance of the cost of direct install measures, directly from the customer. The Program will establish a minimum fee that will be payable per completed Quick Energy Checkup during the negotiation stage of this competitive solicitation.

# General Proposal Requirements

04



## 4. GENERAL PROPOSAL REQUIREMENTS

To assist MDEA in its review of proposals, all bidders are required to complete the following Proposal Attachments. The Proposal Attachments file may be downloaded from the Procurement Portal. Be sure to completely fill out each attachment.

**Attachment A: Company Information**

**Attachment B: Company Questionnaire**

**Attachment C: References**

**Attachment D: Proposed Pricing**

**Attachment E: Technical Exceptions**

# Proposal Evaluation

05



## 5. PROPOSAL EVALUATION

Listed below are key milestones and dates for this solicitation.

MILESTONE	DATE
Release RFP	April 19, 2024
Intent to bid (Required)	April 26, 2024, at 5:00 PM EST
Bidders Conference	May 2, 2024, at 1:00 PM EST
Final Questions Due*	May 3, 2024, at 5:00 PM EST
Question Responses posted on Procurement Portal	May 7, 2024
Proposals due	May 17, 2024, at 5:00 PM EST
Review and Interviews	May 17 - Jun 14, 2024
Contractor Selection, Negotiations and Contracting	June 14 - June 28, 2024

\*Questions may be emailed directly to [procurementteam@mdenergyadvisors.com](mailto:procurementteam@mdenergyadvisors.com) until May 3, 2024.

### Evaluation Criteria

MDEA will take into consideration, and assign points for meeting the following criteria in its award of Program service contracts to selected firms:

**Performance History (15)** - Contractors shall have strong, practical hands-on experience and shall possess a sound understanding of the requirements of the Program. Contractors shall provide references to customers who have recently completed projects with scope(s) similar to the services being proposed in the RFP response. Additionally, Contractors who have participated in EmPOWER programs shall be in good standing.

**Scope of Services (10)** - Contractors must demonstrate a clear understanding of the services being solicited through this RFP and provide a complete and organized proposal as required.

**Staffing and Qualifications (20)** - Contractors shall display experienced staff resources who can initiate the delivery of services with minimal training and start-up. Additional points will be assigned to engaging staff who are residents of Maryland.

**Minority or Veteran owned business (5)** - An additional 5 points will be awarded to Minority or Veteran owned businesses.

**Quality of Equipment (10)** - Contractors shall provide backup documentation as requested concerning the manufacturer/supplier of the equipment they propose to install. The availability of extended and convenient warranty service will be a prime consideration.

**Pricing (10)** - Contractors must offer cost-effective pricing for products and services.

**Marketing & Customer Service (10)** - Contractors shall have demonstrated success in providing marketing/project acquisition to this sector and exceptional customer service.

**Innovation (20)** - Contractors can offer innovative solutions for meeting program needs by focusing on cost savings, suggesting additional measures or services, and outlining plans to transform QECs into project opportunities.



# Miscellaneous

06



## 6. MISCELLANEOUS

### 6.1 Program Agreement Terms

The Program Agreement (Agreement), which results from this RFP, will be for services from the date of award through December 31, 2026. Contractor must offer the option of extending the contract at MDEA's sole discretion for an additional one year, at the rates quoted in the Contractor's proposal, subject to inflation adjustment per a defined price index for labor and materials. On a case-by-case basis there will be flexibility regarding price increases for materials due to circumstances beyond the Contractor's control (i.e. rare earth mineral issue).

### 6.2 Confidentiality

RFP responses are submitted on a non-confidential basis. Contractors may request certain limited and specific sections of RFP responses be kept confidential to the extent permitted by law, but such requests may disqualify responses.

### 6.3 M/V/W Diverse Business Enterprises (DBE)

MDEA encourages registered minority, veteran-owned and women-owned businesses to participate in this opportunity.

### 6.4 MD-Based Businesses

MDEA encourages businesses located in Maryland to participate in this opportunity.

### 6.5 Termination Right of MDEA

MDEA may terminate the Agreement with the selected Contractor at any time upon five (5) days written notice to Contractor for any reason. MDEA shall NOT be responsible for reimbursing the Contractor for any cost incurred in reliance on the expectation that the Agreement would remain in effect throughout the end of the term.

### 6.6 Termination Right of Contractor

The Contractor may terminate the Agreement upon thirty (30) day's advance written notice to MDEA if MDEA has materially breached the Agreement.

# Appendix



# Appendix A: Examples of Provided Marketing Materials





# Energy Savings When You Need It Most

SMALL BUSINESS PROGRAM

Businesses like yours are always looking for ways to cut costs. Pepco is here to help. The Small Business Program offers financial incentives on energy efficiency upgrades for lighting, HVAC, refrigeration, water heating, specialized controls, and more.

## A Small Business Program With Big Benefits

- Covers up to 70% of total project costs for new energy-efficient equipment upgrades
- Reduces maintenance costs
- Lowers energy and water costs
- Enhances visibility indoors and out
- Improves indoor air quality
- Creates a more comfortable environment for customers and staff
- Delivers up to \$250 worth of new energy-efficient products at no additional cost

## Savings Across the Board

Investing in energy-efficient equipment now can help keep your business competitive and weather whatever is ahead. With incentives that can cover up to 70% of project costs, upgrading your energy efficiency has never made more sense. You'll pay less upfront, reduce the costs associated with maintaining inefficient equipment, and save more over the long haul with lower utility costs.

## Start With a No-cost Energy Check-up

To identify energy-saving opportunities at your business, schedule a no-cost Quick Energy Check-up with one of our approved Service Providers. In addition to sharing their findings, they'll install energy-efficient products like LED bulbs, smart power strips, and more—valued at up to \$250—at no additional cost.

## Six Steps to Cashing In

- 1) Start by contacting an approved Service Provider and scheduling a Quick Energy Check-up.
- 2) Once the check-up is complete, review the report with your Service Provider. The report will highlight how you can save the most energy and money, plus provide a list of cash incentives currently available.
- 3) Next, work with your Service Provider to prepare and submit your program application.
- 4) After your application is approved, your Service Provider will perform the work and complete the upgrades.
- 5) Once the upgrades are complete, your Service Provider will submit the remaining paperwork.
- 6) Receive your incentive check.

## Check Your Eligibility Now

Look at your Pepco bill to see what your business's average energy use is per month. If you use 100 kW or less, you qualify. To confirm your eligibility, have your account number ready and email [pepco.EnergySavings@TRCCompanies.com](mailto:pepco.EnergySavings@TRCCompanies.com) or call 866-353-5798 and select option #4.



### Need a Jumpstart?

Don't let upfront costs put your plans on hold. We offer a Small Business Energy Advance that is repayable through your electric bill, with zero interest for up to 24 months.\*

\*Minimum project costs must be \$2,500, including materials and labor.

## Start Seeing the Savings

We're here to help you enhance your business and improve your bottom line. Contact your Service Provider today.

Name \_\_\_\_\_

Company \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

## Get the details

To learn more about Pepco's Small Business Program, visit [pepco.com/SmallBusiness](http://pepco.com/SmallBusiness).

EmPOWER Maryland programs are funded by a charge on your energy bill. EmPOWER programs can help you reduce your energy consumption and save you money. To learn more about EmPOWER and how you can participate, go to [pepco.com/Business](http://pepco.com/Business).  
© Potomac Electric Power Company, 2022 SB 08/22





Saving you energy  
and money—**that's  
our business**



### Making upgrades affordable

Are you interested in starting an energy efficiency project but worry about the cost? We can help you upgrade to energy-efficient equipment like HVAC systems, lighting, and more. Our incentives can cover up to 70% of project costs.

### Small Business Energy Advance

Plus, you can get funds to pay for upfront project costs. The Small Business Energy Advance is repayable through your electric bill, with **zero interest for up to 24 months**.

Pay <b>\$0</b> Upfront	Get <b>0%</b> Interest	For up to <b>24</b> Months
Minimum project costs must be \$2,500, including materials and labor.		

### Get started

To confirm your eligibility, have your account number ready and email [pepco.energysavings@trccompanies.com](mailto:pepco.energysavings@trccompanies.com) or call 866-353-5798 and select option #4.

EmPOWER Maryland programs are funded by a charge on your energy bill. EmPOWER programs can help you reduce your energy consumption and save you money. To learn more about EmPOWER and how you can participate, go to [pepco.com/Business](http://pepco.com/Business).

© Potomac Electric Power Company, 2022

SMB-1022





MDEA delivers energy solutions with unparalleled customer service. By infusing art into energy, we create dynamic customer-centric experiences. We deliver personalized solutions that matter to people and the world around them. For more information, please visit, [mdenergyadvisors.com](http://mdenergyadvisors.com).