



Submitted to:

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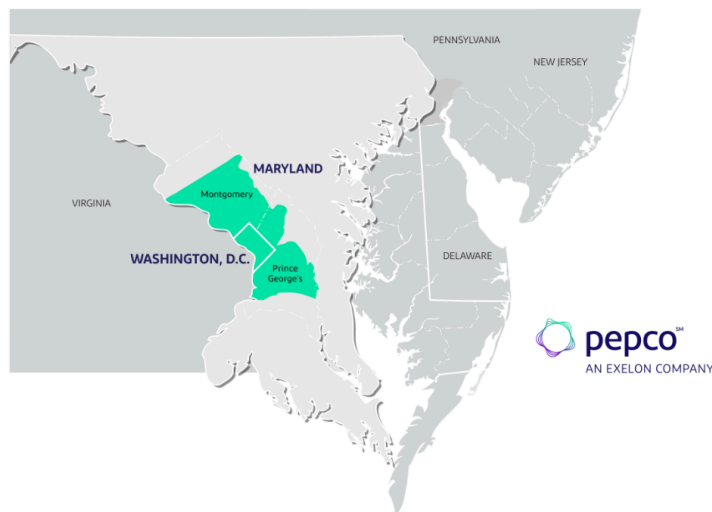
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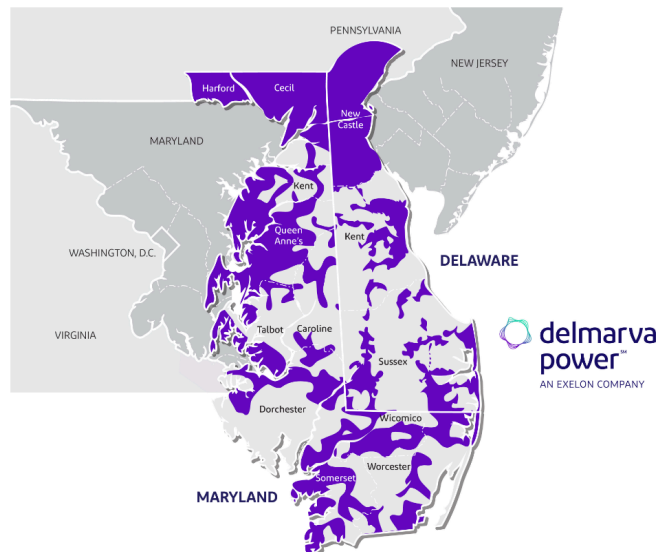
1 Introduction

Pepco and Delmarva Power (DPL) are Exelon Companies with service territories in Maryland. Pepco and DPL have each implemented a suite of energy efficiency programs to provide residential customers in their Maryland service territories with energy and cost savings opportunities, in conjunction with the EmPOWER Maryland initiative. Pepco serves about 582,000 Maryland residential customers and DPL serves about 208,000 Maryland residential customers.

Pepco Service Territories



DPL Service Territory





Pepco and DPL have selected ICF Resources, LLC (ICF), a subsidiary of ICF, to assist in design, implementation, and management of the QHEC program. ICF has longstanding experience in delivering energy efficiency programs for numerous utilities throughout the United States, through its own staff and through subcontractors.

The purpose of this Request for Proposal (RFP) is to select companies with the qualifications necessary to provide Quick Home Energy Check-ups (QHECs) to Pepco and/or DPL customers. The delivery of QHECs provides Pepco and DPL a significant opportunity to educate customers on how they can save energy and motivate them to participate in other Pepco or DPL Home Energy Savings Programs that best fit their needs and budgets.

In addition, Pepco, DPL, and ICF encourage Minority Business Enterprises (MBEs), service-disabled 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. Selected companies are encouraged to fully carry out this policy in the award of subcontracts consistent with the efficient performance of this contract.

From responses to this RFP, ICF will select a list of on-call subcontractors who will be retained by ICF through a standard subcontract agreement on behalf of Pepco and/or DPL.

The selected companies, (hereafter referred to as "subcontractor") will receive training from ICF on the delivery of the QHEC and will be required to follow all program procedures and policies. QHEC Subcontractors may only distribute marketing materials provided and/or approved by ICF to QHEC participating customers. Subcontractors are prohibited from selling any services or products to Pepco and/or DPL customers during the QHEC and from proactively soliciting the customer post-QHEC delivery. Subcontractors are expected to recommend all Pepco and/or DPL Home Energy Savings Programs for which the customer would be a good candidate. If the customer is interested in learning more about and/or participating in additional Pepco or DPL Home Energy Savings Programs, subcontractors are required to refer customers to the Pepco or DPL websites or dedicated call-in numbers for more information.

Pepco Home Energy Savings Program, including the QHEC, can be found at <https://www.pepco.com/WaysToSave/ForYourHome/Pages/Maryland.aspx>

Pepco Home Energy Savings Program Dedicated Phone number: 866-353-5798

DPL Home Energy Savings Program, including the QHEC, can be found at <https://www.delmarva.com/WaysToSave/ForYourHome/Pages/Maryland.aspx>



DPL Home Energy Savings Program Dedicated Phone number: 866-353-5799

2 Minimum Qualifications & Eligibility

ICF is looking for companies that possess the knowledge and experience to analyze a home's performance using a whole-house approach. Prospective QHEC subcontractors must have experience delivering residential energy audits and have staff certified through the Building Performance Institute (BPI). All technicians to be deployed in the program for conducting Check-ups must be certified as Building Performance Institute (BPI) Building Analysts- Technicians (BA-T).

In addition to their technical skills, QHEC subcontractors must be able to clearly present and articulate the benefits of the Pepco or DPL Home Energy Savings Programs and educate customers about energy saving opportunities in their homes.

Companies must hold a Maryland Home Improvement Contractors (MHIC) license and provide a 1-year warranty minimum to cover all aspects of each QHEC delivery, as well as meet ICF insurance requirements that are outlined in Attachment A.

3 Scope of Work

Subcontractors shall provide residential auditing services for the Pepco and/or DPL QHEC Programs.

The QHEC is designed as a thorough visual inspection of the home. It is labeled as a "Check-up" to avoid confusion with the comprehensive home energy audit delivered by subcontractors participating in the Home Performance with ENERGY STAR® Program. The primary goals of the QHEC are:

- Educate customers about their homes' energy efficiency,
- Educate and recommend all Pepco and DPL Home Energy Savings Programs for which the customer would be a good candidate,
- Strengthen customer awareness and participation in EmPOWER Limited Income Programs through education and referrals,
- Improve customer insights through better data,
- Install energy efficient measures at no additional cost to the customer, and
- Provide customers with a positive experience that encourages ongoing participation and interest in EmPOWER programs and services.



Please note that Virtual Home Energy Check-ups (VHECs) also offered are virtual, and therefore, will not allow for direct installation of energy efficiency measures, but instead will include subcontractors ordering a kit containing said measures for delivery to the customer. For additional details on differences between QHEC and VHEC, please see section 3.1d below.

The QHEC process begins with the customer requesting a QHEC either through the Pepco or DPL Call Center or QHEC online Scheduler (Program Generated Leads), or directly with a subcontractor as a result of the subcontractor's outbound marketing (Self-Generated Leads). A mobile device is required for each QHEC Analyst to complete the appointment and must be provided by the subcontractor. ICF will not supply mobile devices.

The measures eligible for installation (or VHEC ordering) may include the following (subcontractors will be given a minimum of 30-days notice if any measures are added or removed from the subcontract agreement):

2025 Eligible QHEC Direct Install Measures	
Efficient-flow Showerheads	Water Pipe Insulation*
Efficient-flow Faucet Aerators	Smart Power Strips
LED Bulbs	Water Heater Temperature Turn-down*
ShowerStart™ Adapters*	Smart Thermostat*
Door Sweeps	Weatherization Stripping

*In-person QHEC only

For subcontractors to be paid for the QHEC service, including a fixed QHEC fee, fixed prices for direct install measures, and associated fixed install fees (please see section 3.1.4 for VHEC-specific details):

- Measures must be installed (may not be left behind for customer installation).
- Measures must be purchased up front through ICF's preferred vendor.
- Customer must meet eligibility as listed in the subcontract agreement.
- Customer must agree to the new measure installation and the permanent removal by the subcontractor of items that are being replaced at the time of the service.

If selected to participate in the 2025 QHEC Program year:

- The subcontractor will be directed to provide additional information regarding each QHEC Analyst which may include social security number, background check information, and other personal information as directed by Exelon's badging process.
- The subcontractor will sign a subcontract agreement that will allow them to potentially deliver single family and multifamily QHECs and VHECs.



The descriptions of single family and multifamily QHECs and VHECs are detailed below:

3.1 Single Family QHEC

3.1.1 Single Family QHEC Description and Eligibility

1. The QHEC visual inspection, Sightline Mobile (an online platform used to deliver the QHEC) data entry, and customer education process shall take approximately 1 hour. Installation of direct install measures may take an additional half hour, while installation and troubleshooting of smart thermostats may take an additional 45 minutes or more. Thermostat installations can be completed during a scheduled follow-up appointment. The QHEC visit typically includes the following:
 - a. A review of customer's consumption data that highlights seasonal usage and base load.
 - b. A visual inspection of the home (insulation levels, HVAC equipment, ductwork, lighting, and appliances).
 - c. Customer education, including ways to reduce energy consumption, energy saving tips, and other helpful suggestions.
 - d. Recommendations for potential participation in other pertinent Pepco or DPL Home Energy Savings Programs.
 - e. Installation of direct install measures (with removal of replaced items).
 - f. Information about assistance available through the EmPOWER Limited Income Program and referral of customers to DHCD, when applicable.
 - g. Record information deemed useful by Pepco or Delmarva Power to determine eligibility for additional programs or services.
2. To participate in the QHEC Program, the customer must have:
 - a. An active, residentially metered Pepco or DPL account, regardless of their electric or natural gas supplier.
 - b. An adult aged 18 or older present during the QHEC or VHEC.
 - c. Not received a QHEC at their current address within the past five years.
 - i. Customers are eligible to receive an additional QHEC after 5 years.
3. It is important to note that any products or services outside of the QHEC Scope of Work may not be solicited or performed during the QHEC visit without the expressed written consent of the QHEC Program. Pepco and DPL customers fund the performance of the QHEC via EmPOWER Maryland, and therefore, this money may not be used for any service completed outside the QHEC Program Scope of Work. Similarly, Pepco and DPL badges may not be worn by a subcontractor's employees for work outside the scope of the QHEC Program (including other EmPOWER Maryland Programs).



3.1.2 Scheduling Single Family QHECs

1. The QHEC process begins with the customer requesting a QHEC either through the Pepco or DPL Call Center, QHEC Online Scheduler, or directly with a subcontractor because of the subcontractor's outbound marketing.
 - a. For subcontractor-generated leads, the customer is scheduling directly with the subcontractor who will deliver the QHEC. When the subcontractor enters the lead into Sightline Scheduler, an ICF scheduling program, the QHEC will always be assigned to the subcontractor who entered the lead.
 - b. For a Program-generated lead, the customer requests an appointment through the Pepco or DPL Call Center or directly through the Sightline Scheduler. Program-generated leads will be assigned to a subcontractor via Sightline Scheduler. Subcontractors receiving leads must maintain the Sightline Scheduler and update the system with accurate technician availability. The subcontractor must check the system frequently and respond to the request for scheduling within two business days. It should be noted that not all subcontractors will receive program leads.
 - c. Additional program-generated leads will also come into Sightline Scheduler as leads from customers who will be participating in the Appliance Recycling Program. As such, these customers have only agreed to receive more information about the QHEC Program and may not necessarily schedule a QHEC afterwards. These leads will contain the recycling appointment date, so that the subcontractor may attempt to accommodate performing the QHEC on the same day as the recycling visit, if requested.
2. If the customer provided an email address, they would receive an automatic reminder email 48 hours in advance of their QHEC appointment.
3. The business day before the delivery of the QHEC, the subcontractor will phone the customer to verify their appointment for the next day and confirm the timeframe for their QHEC appointment. If the subcontractor is unable to reach the customer for appointment verification, the subcontractor should leave a message (if possible) and is still expected to keep the appointment.

3.1.3 Submitting Single Family QHECs for Invoicing

The following documentation must be completed and submitted as a part of the QHEC Program:

1. An application completed and submitted by the subcontractor through the Sightline Mobile Tool for each account served. ICF will provide subcontractors access to a database to identify customer utility account numbers and to determine customer eligibility.
2. The Pepco or DPL QHEC Mobile Tool will be used to deliver the QHEC, and the subcontractor will provide a written summary report of findings to the customer. ICF will train subcontractors on the use of the QHEC Mobile Tool.



- a. The QHEC Mobile Tool is compatible with a variety of mobile devices. A mobile device is required and must be provided by the subcontractor. (The QHEC Program will not supply mobile devices.)
 - b. QHEC Reports of the findings will be emailed and/or mailed within a week to the customer, according to the customer's preference obtained during the QHEC.
3. If errors are found, a report will be emailed to one contact from the subcontractor daily outlining all errors. Once the errors are fixed by the subcontractor, the application must be reset to Application Received status to be included in the next semi-monthly invoice period.

3.1.4 Virtual Home Energy Check-up Description and Eligibility

The Virtual Home Energy Check-up (VHEC) intends to deliver a similar experience to an in-person QHEC while doing so in a virtual environment. The VHEC allows customers to participate via video chat or phone call, where the customer virtually "walks" the technician through their home, so that the technician can visually inspect it. Using the Sightline Mobile Tool, the technician will record observations and insights from the customer and use them to make recommendations on how the customer can improve the energy efficiency of their home. The technician will also select measures to be included in a customized energy efficiency kit that will be directly shipped to the customer by ICF's preferred fulfillment vendor.

1. To participate in the VHEC program, the customer must have:
 - a. An active, residentially metered Pepco or DPL account, regardless of their electric or natural gas supplier.
 - b. Never previously received a QHEC or VHEC at their current address within the last five years.
 - c. An adult aged 18 or older present during the VHEC.
2. Differences between VHEC and QHEC include:
 - a. Prior to the VHEC appointment, the customer will be sent the Terms and Conditions and a "Checklist" document that sets the expectations of what will happen during the VHEC.
 - b. At the start of the appointment, the customer will need to be recorded acknowledging their receipt and acceptance of the Terms and Conditions.
 - c. No more than 10 days after the customer receives their kit, the contractor will be responsible for following up with the customer to answer any technical questions or installation concerns that the customer may have.

3.2 Multifamily QHEC

The following is a summary of the stages of a multifamily QHEC project and its procedures. A more detailed document will be supplied to the subcontractor pending their approval into the program.



3.2.1 Multifamily QHEC Description and Eligibility

1. The Multifamily initiative is a component of the QHEC Program. Subcontractors will be responsible for generating all leads. To be considered a multifamily project, a Multifamily QHEC must:
 - a. Be approved by the property manager that all units in the complex could potentially be served. The Property Manager will sign the QHEC Terms and Conditions.
 - b. Allow residents to be given the opportunity to “opt-out” prior to the start of the Multifamily QHEC in the property/community and before the Multifamily QHEC begins at their individual unit.
 - c. Allow residents to be given the opportunity to “opt-in” to have their personal bulbs to be considered for replacement, with the understanding that their current bulbs will be permanently removed from the premise. This notice should be issued in the same timeframe as the “opt-out” notice.
 - d. Be pre-approved by ICF Program staff, to ensure that the Multifamily QHEC is cost effective for the Program and to ensure that there are available funds.
2. For a multifamily complex to be considered for the program, it must meet the following criteria:
 - a. Each resident to be served must have a separate and active residential Pepco or DPL electric account.
 - b. Never previously received a QHEC (single family, multifamily, or virtual) at their current address within the past five years.
 - c. The resident does not have to be home to receive energy saving measures. If someone is home (at least one person aged 18 or older must be present), it is expected that the full QHEC experience will be delivered (inspection, report, measure installation(s), review finding with resident, etc.).

3.2.2 Scheduling Multifamily QHECs

The following process should be followed when scheduling Multifamily QHECs:

1. ICF Program staff may accompany the subcontractor during any of their appointments with Property Managers of Multifamily complexes. During this meeting the subcontractor will explain the Multifamily QHEC program as well as determine the size of the property (number of residences), the water heater fuel type, and confirm that the residences are individually metered.
2. The Property Manager and Multifamily QHEC subcontractor will walk through at least one of each unit type (1 bedroom/1 bath, 1 bedroom/2bath, etc.), and at least 5% of all units in total, to determine the number and type of measures to be submitted through the pre-approval portal.



3. Upon completion of the walk-through, the Property Manager will sign the QHEC Terms and Conditions and agree to a tentative installation date.
4. Using all the above information, the subcontractor will then use the Program's portal (Sightline Tracking) to submit the project for pre-approval.

3.2.3 Submitting Multifamily QHECs for Invoicing

For subcontractors to receive payment for Multifamily QHECs completed, they must:

1. Create an application through Sightline Multifamily Mobile Tools for each unit served. Each application must document information regarding the energy efficiency of the unit in addition to recording each measure installed in the unit.
2. If there are no errors found with the application, the file will be included in ICF's semi-monthly invoice pull.
3. If errors are found, a report will be emailed to one contact from the subcontractor daily outlining all errors. Once the errors are fixed by the subcontractor, the application must be reset to Application Received status to be included in the next semi-monthly invoice period.

4 Submission of RFP Proposal Forms

Companies wishing to participate as a QHEC subcontractor should submit a response to this RFP describing their qualifications to provide the required services. Completion of each section is required. **Incomplete or late responses will not be considered.** Responses should include the following items:

Proposal Part 1: Cover Sheet (Attachment A)

All proposals must include the attached application form as a cover sheet.

Proposal Part 2: Questionnaire (Attachment B)

Please include a response to all questions in the questionnaire. This questionnaire is designed to allow subcontractors the opportunity to demonstrate their capabilities and specific experience.

Proposal Part 3: Energy Audit Report and other Documentation

Please attach to this document an energy audit report and/or any supporting documentation.

Proposal Part 4: Provide Qualifications of Key Staff

A standard résumé including professional experience, publications, membership in professional organizations, education, certifications, training, and any other relevant experience should be attached. It will be mandatory for all staff performing QHECs on behalf of the Pepco and/or DPL QHEC program to submit required information that meets all Pepco and/or DPL requirements to



receive a Pepco and/or DPL badge. Badges can only be worn while performing QHECs. Badges must be returned if an employee is terminated.

Proposal Part 5: Professional References

A minimum of three professional references directly related to the delivery of residential energy audits.

5 Proposal Evaluation

Each proposal will be graded based on the following categories:

Scope of Service: The selected firms must demonstrate a clear understanding of the services being solicited through this RFP.

DBE Status: Pepco, DPL, and ICF encourage Minority Business Enterprises (MBEs), service-disabled veterans, and women-owned businesses to participate in this opportunity as Diverse Business Enterprises (DBEs). The selected firms must provide documentation of such status to be considered a DBE.

Past Performance: The selected firms shall have strong experience in conducting energy audits and/or delivering services for other energy efficiency programs. Firms may also be evaluated on past performance based on feedback from industry partners or participants. If previously under QHEC subcontract, firms will be evaluated based on that experience.

Complete/Timeliness: The selected firms shall submit a complete and thorough proposal through the Procurement Portal (portal URL is provided below) by the deadline provided by ICF.

Customer Service: The selected firms shall have demonstrated success in providing exceptional customer service while delivering home energy audits and reporting, including providing results and examples to ICF.

Staffing qualifications: The selected firms shall display evidence of having experienced staff, resources, capacity in providing energy audits (and QHECs if incumbent), and licensing requirements as outlined in Section 2.0 of the QHEC RFP. Additionally, there will be evaluation based on administrative staff and experience.

Ability to Generate Leads: The selected firms shall demonstrate the ability to generate QHEC leads and provide valid examples of how they plan to do so in the 2025 QHEC Program.



Thermostat Installation: The selected firms should convey that the company has experience and success in installing and troubleshooting smart thermostats. Experience with installing multiple brands will be considered.

6 Deadlines and RFP Submission Instructions

RFP responses must be submitted by 5:00 PM (Eastern) on Monday, October 28th, 2024.

Please submit your completed response via the online procurement portal at this URL:

<https://eeprocmntportal.com/>. The document must be saved and uploaded in the following format: CompanyName_Utility_2025RFP.

Questions may be submitted on the procurement portal by 5:00 PM (Eastern), Monday, October 21st, 2024. ICF cannot guarantee a response to questions received after that date and time. Any relevant questions submitted will be sent to everyone who is registered as a respondent on the procurement portal.

7 Miscellaneous

7.1 Contract Term

The QHEC Subcontract that results from this RFP will be for services provided from **January 1st, 2025 through December 31st, 2025**. If applicable, payment for services incurred in December 2025 may be processed in January 2026 dependent on end of year invoice processing closeout timelines, not contingent upon a continued services contract for the 2026 program year.

ICF may unilaterally extend the term of this Agreement by giving written notice to the Subcontractor. ICF may provide preliminary notice of its intent to extend the term, but the preliminary notice does not commit ICF to extend the term past the initially awarded period of performance until a continued services contract has been fully executed.

7.1.1 Partnerships

For Single Family QHECs, the subcontractor is not allowed to hire additional contractors. Only employees of the subcontractor are permitted within the program's scope of work.

For Multifamily QHEC projects, partnerships with DBE contractors are allowed. Partnerships need to be disclosed to ICF program management. The subcontractor company who is awarded the proposal is responsible for maintaining the program's scope of work.



7.1.2 Payment Processing Expectations

The subcontractor should be prepared to receive their first payment three months after they properly complete and submit their first QHECs. All QHECs should be submitted (from the QHEC Mobile Tool) within a few days of the QHEC date. It is expected that the subcontractor will have the capital necessary to cover the costs of the work they do until they are paid. After the first payment is received, the subcontractor can generally expect to be paid approximately twice a month, as long as they continue to submit completed QHECs in the system.

7.2 Confidentiality

ICF, Pepco, and DPL will supply the subcontractor with confidential utility customer information in a secure manner. All such information is the exclusive property of Pepco and/or DPL. The subcontractor shall not sell, barter, or exchange any information provided for this Program, including but not limited to the customer information, in perpetuity. The subcontractor shall not copy customer information without prior written consent provided by ICF, Pepco and/or DPL. The subcontractor will meet all Exelon security standards for protecting Pepco and DPL customer information.

The subcontractor, its employees, and its agents shall not use the customer information or the delivery of the Program for the generation of leads for sales of any other services or products the subcontractor may offer in perpetuity. Bidders' responses and pricing for this solicitation will be treated as confidential.

7.3 Regulatory Scrutiny of Work

The subcontractor should understand that their documents and work will become part of a public process involving incentive regulation and cost recovery, and be reviewed and scrutinized by ICF staff, Pepco and DPL, independent consultants, intervenor groups, and regulatory staff. All data developed by the subcontractor under these contracts are the property of ICF, Pepco and DPL; and electronic files containing all data shall be submitted to ICF as per the subcontract agreement.

7.4 Contract Termination

7.4.1 Termination Right of ICF

ICF may terminate any subcontract agreement at any time upon five days written notice to subcontractor for any reason. ICF shall NOT be responsible for reimbursing the subcontractor for any cost incurred in reliance on the expectation that the agreement would remain in effect throughout the end of the term.



7.4.2 Termination Right of Subcontractor

The subcontractor may terminate this agreement upon 30 days written notice to ICF.

7.5 Approval of Marketing Campaigns to External Parties

The subcontractor will submit for approval (to ICF) any marketing campaign concepts, materials, and/or statements to external parties representing the QHEC Program. Approval for usage will be at the discretion of ICF, Pepco, and DPL.

Cold call marketing is not permitted within the QHEC Program. Subcontractors may be permitted door-to-door canvass customers' homes in promotion of the QHEC Program at the discretion of ICF, Pepco, and DPL.

7.6 Minority/Disadvantaged Business Enterprises (MBE/DBE)

ICF encourages minority, service-disabled veterans, and women-owned businesses to participate in this opportunity. Please provide documentation of such status in order to be considered as an MBE/DBE.



Attachment A: Company Information

Pepco and Delmarva Power Quick Home Energy Check-up Program

Company Details

Company Name: Elysian Energy

MHIC #: 129162

Street Address: 14300 Cherry Lane Ct.

Suite #: 214

City: Laurel

State: MD

Zip Code: 20707

Phone: 240-381-0395

Fax: 240-536-4919

Email: info@elysianenergy.com

Website: www.elysianenergy.com

Hours of Operation: 8:00 am to 6:00 pm Mon.-Fri.

Insurance Minimum Requirements

Type	Minimum Amount Required	Have Required Coverage?
Commercial General Liability – Each Occurrence	\$1,000,000	<input checked="" type="checkbox"/>
Products/Completed Ops Limit	\$1,000,000	<input checked="" type="checkbox"/>
Adv/Personal Injury	\$1,000,000	<input checked="" type="checkbox"/>
General Aggregate	\$2,000,000	<input checked="" type="checkbox"/>
Auto Liability (owned and not owned)	\$1,000,000	<input checked="" type="checkbox"/>
Worker's Comp – Employer's Liability	\$1,000,000	<input checked="" type="checkbox"/>
Excess or Umbrella Liability – Each Occurrence*	\$1,000,000	<input checked="" type="checkbox"/>
Personal Liability – Each Claim	\$1,000,000	<input checked="" type="checkbox"/>
Professional Liability, Errors and Omissions	\$1,000,000	<input checked="" type="checkbox"/>
Cyber Insurance – Each Occurrence	\$2,000,000	<input checked="" type="checkbox"/>



* Waived if Contractor has Commercial General Liability AND Auto Liability in amounts not less than \$2,000,000 each occurrence.

Single Family QHECs

Single Family Application

Subcontractors will perform QHECs as a result of the subcontractors' outbound marketing (Self-Generated Leads).

Pepco Consideration for Single Family QHEC: Yes ☒ No ☐

Delmarva Power Consideration for Single Family QHEC: Yes ☐ No ☒

Program Generated Leads

For a Program-generated lead, customers request an appointment through Sightline Scheduler. Subcontractors receiving leads must maintain Sightline Scheduler and update the system with accurate technician availability. It is expected that subcontractors initiate customer contact with program generated leads within two business days. It should be noted that not all subcontractors will receive program leads.

Pepco Consideration for Program Generated Leads: Yes ☒ No ☐

Delmarva Power Consideration for Program Generated Leads: Yes ☐ No ☒

Counties Served

Please check all areas which you are able to service (use additional sheets if necessary):

Pepco Service Territory

County	All Zips?	Selected ZIPS (List next to box)
Prince George's County	<input checked="" type="checkbox"/>	Click or tap here to enter text.
Montgomery County	<input checked="" type="checkbox"/>	Click or tap here to enter text.

Delmarva Power Service Territory



County	All Zips?	Selected ZIPS (List next to box)
Harford County	<input type="checkbox"/>	Click or tap here to enter text.
Cecil County	<input type="checkbox"/>	Click or tap here to enter text.
Kent County	<input type="checkbox"/>	Click or tap here to enter text.
Queen Anne's County	<input type="checkbox"/>	Click or tap here to enter text.
Talbot County	<input type="checkbox"/>	Click or tap here to enter text.
Caroline County	<input type="checkbox"/>	Click or tap here to enter text.
Dorchester County	<input type="checkbox"/>	Click or tap here to enter text.
Wicomico County	<input type="checkbox"/>	Click or tap here to enter text.
Somerset County	<input type="checkbox"/>	Click or tap here to enter text.
Worcester County	<input type="checkbox"/>	Click or tap here to enter text.

Appointment Availability

Please check all times you are able to provide appointments to customers:

Day	Early Hours (7am-8am)	Work Hours (8am-6pm)	Evening hours (After 6pm)
Monday	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tuesday	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Wednesday	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Thursday	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Friday	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Saturday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sunday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Multifamily QHEC

The Multifamily initiative is a component of the QHEC service with budgetary limitations set by the ICF program staff. Subcontractors will be responsible for generating all leads. Multifamily Projects must be approved by ICF program staff.

Pepco Consideration for the Multifamily Program: Yes ☒ No ☐

Delmarva Power Consideration for the Multifamily Program: Yes ☐ No ☒

Staff Foreign Language Fluency

Oftentimes Pepco and DPL customers request someone to schedule and/or deliver their QHEC in a foreign language. Please denote any staff below who are fluent in a language other than English (Including Sign Language).

Name	Language	Scheduler?	Technician
Julio Jovel	Spanish	N	Y
Rolando Jovel	Spanish	N	Y
Richard Aikins-Andoh	Twi, Fanti, Ga	N	Y

Company History and Performance

Number of Years Performing Residential Energy Audits: 17.5

Number of Residential Energy Audits Delivered: 7300 CHEAs, over 135,000 QHECs

In the table below, list the names of your auditing staff. In the columns to the right, list the expiration dates (MM/YY) of each BPI certification they have achieved. Please fill out as many sheets as necessary. Please list any additional relevant certifications.

Name	BPI Certifications(s)	Other Relevant Certifications/Licenses
James Conlon Jr.	BA 06/25, EA 06/25, QCI 06/25, MFBA 07/25	HVAC-R



Name	BPI Certifications(s)	Other Relevant Certifications/Licenses
Kerensa Loadholt	BA-T 08/27	
Rolando Jovel	BA 05/26	
Julio Jovel	BA 06/26	Advanced Weatherization Tactics, Mold Awareness
Nina Zou	BA-T 03/27	
Richard Aikins-Andoh	BA 11/25	
Elliot Firestone	BA-T 10/27	
Jessica Murphy	BA 03/26	
Joseph Witczak	BA 07/25	
Nicole Logston	BA 07/25	
Ralph Vanveen	BA-T 07/26	Journeyworker Electrician
Sandra Johnston	BA 06/25	
Thomas Richards	BA 05/25	
Kayla Arriaga	BA-T 08/27	
Anthony Murphy	BA-T 08/27	



Attachment B: Company Questionnaire

Pepco and Delmarva Power Quick Home Energy Check-up Program

All applicants please provide answers to all questions below. The text box will stretch to accommodate your answers. Sign below upon completing your answers.

1. Are you a registered Maryland business? If so, describe your business. What services does your business currently provide in-house and via subcontractors? How many customers does your business serve in Maryland?

Click here to enter text.

2. Describe your company's experience in building science, energy efficiency, delivering home energy audits, and providing comprehensive building performance services. Please provide any examples (building, project, etc...).

Click here to enter text.

3. As mentioned in section 3, Pepco and DPL will include smart thermostats as a part of the QHEC Program during the 2025 program year.
 - a. Describe your company's experience with installing and troubleshooting smart thermostats and whether these tasks are performed in-house or via subcontract. Please include whether your company (or subcontractor's company) employs at least one technician with an HVAC-R Journeyman (or higher-level HVAC-R) license.

Click here to enter text.

- b. Please describe how you would deal with thermostat issues after you've completed the installation; follow up call, return-visit, customer complaints via the call center.

Click here to enter text.

4. Describe your company's approach to customer service through specific examples. Documented internal company workflows for dealing with challenging customers and customer complaints are preferred. Awards/articles/testimonials proving positive customer service are also welcome in order to demonstrate your company's commitment to providing exceptional customer service.

Click here to enter text.



5. Are you currently a participant in any of the other Pepco and/or DPL Home Energy Savings Programs? How would you keep QHEC separate from your other business operations and services?

Click here to enter text.

6. Does your business utilize personal vehicles or company-branded vehicles to service customers? Are any of these vehicles electric or hybrid? Do you have any plans to incorporate electric or hybrid vehicles into your business?

Click here to enter text.

7. Is your company certified in Maryland as a Minority or Disadvantaged Business Enterprise (MBE/DBE)? If so, please respond below and attach documentation of MBE/DBE status.

Click here to enter text.

8. Describe your company's approach to quality control and quality assurance? How do you ensure that customers are receiving a similar experience between technicians?

Click here to enter text.

9. Is your company a network partner with the Maryland Department of Housing and Community Development (DHCD)? Does your company have any experience participating in Maryland's EmPOWER Limited Income Programs, or similar assistance programs administered by non-utility entities?

Click here to enter text.

****SINGLE FAMILY APPLICANTS ONLY****

10. Not all Pepco and/or DPL QHEC subcontractors receive program-generated leads. Provide any examples you may have from past or present lead generation campaigns. How do you propose to supplement utility marketing efforts with your own to generate leads for the Pepco and/or DPL QHEC Programs? Provide any examples you may have from past or present lead generation campaigns, specifically that have high conversion rates from leads to participation. Please provide thoughts on how you might target campaigns towards the low-to-moderate income demographic.

Click here to enter text.



11. How would you approach the delivery of a Single Family QHEC with a smart thermostat installation? Based on your experience, please describe whether this would best be accomplished in one service visit, or if the smart thermostat installation should be completed in a follow-up visit (within a week)?

Click here to enter text.

****PROGRAM GENERATED LEAD APPLICANTS****

12. Please highlight your company's administrative abilities to handle a large volume of leads and database regulation. Do you feel your business will be equipped to handle changes to the number of leads depending on demand?

Click here to enter text.

13. During the 2025 program year, the QHEC Program will be marketed to customers scheduling with the Appliance Recycling Program.

- a. Please describe how your company can allocate resources in order to accommodate customer requests for a specific day and/or time.

Click here to enter text.

- b. What is the minimum number of days notice your company would need in order to ensure that you accommodate these requests anywhere within the utility service territory?

Click here to enter text.

****MULTIFAMILY APPLICANTS ONLY****

14. Please describe any existing or future relationships you may have with multifamily property management companies, to generate leads.

Click here to enter text.

15. If planning to do a partnership with another company, please disclose the relationship.

Click here to enter text.

I understand this application is to determine my eligibility to participate in the Pepco and/or DPL Quick Home Energy Check-Up Programs (QHEC) in Maryland and does not constitute any formal



agreement to participate in the QHEC Program. I further understand that if my company is selected to participate, that it will require signing a standard task ordering agreement with ICF on behalf of Pepco and/or Delmarva Power outlining all terms, program policies, and procedures to deliver QHEC services.

Company Representative Name: Click to Enter Text

Title: Click to Enter Text

Signed: Click to Enter Text



Scope of Work: Policies and Procedures for Delivery of the Quick Home Energy Check-up Program

Procedures for Delivery of the Single Family QHEC

All QHEC Analysts should have a copy of this set of Policies and Procedures at their disposal during the delivery of QHECs.

Technical Delivery Process

During the Introduction a QHEC Technician should:

- Be properly dressed: Technicians should wear a collared shirt (polo or button down – no t-shirts), closed-toed shoes, and khakis or jeans without any holes. ID badges issued by ICF to all QHEC technicians must be worn and always displayed during a QHEC.
- Inform customer that they work for an approved independent subcontractor working in support of the utility, and they should also show their utility badge.
- Verify that the customer is over 18 years old.
- Review the process for QHEC delivery and direct installations with the customer and request the customer's interaction with the Check-up delivery.
- **Have the customer read and sign the required Terms & Conditions before QHEC begins.**

Customer Discussion

The following pieces of information should be gathered from the customer (where possible):

- Age of home, square footage, # of years that customer has lived there, number of full-time occupants.
- Remodeling, additions, window replacement, bonus rooms.
- Basic information about HVAC system(s): type of fuel, age of systems (if known). This includes use of room air conditioners in summer even if Check-Up is conducted in winter.
- Comfort complaints (cold rooms/hot rooms, drafts, moisture and humidity).
- Review of historical energy usage (depending on availability of data; data may be available through the utility).

Exterior Inspection

The subcontractor will conduct an exterior inspection of the home, looking for anything that could relate to airflow or energy transference, including but not limited to:



- Signs of moisture or ice dam damage on walls and soffits that may have resulted from building performance problems.
- Roof moisture damage (stains, soft or rotted deck/rafters, wet or moisture-damaged insulation) from roof leaks or inadequate ventilation.
- Issues with shading or exposure to sun (linked to issues with hot/cold rooms and can help prioritize window-related measures).
- Property slope, downspout terminations, or sprinklers that may direct water towards the foundation or affect the performance of an exterior wall.

Interior Walk-through

Conduct a walk-through (with the customer) to ascertain additional information (customer has opportunity to bring up any issues or concerns that s/he has related to the assessment). The subcontractor will take this opportunity to inspect major appliances and lighting with the customer and educate them on the benefits of replacing older appliances and lighting with ENERGY STAR certified products. Additionally, the Analyst will educate the customer about the consumption of energy in their home.

Envelope Inspection

- Note key features of home typical of house type (porch roof, multiple roof lines, cantilevers, bay windows, dormers, knee wall attics, attic access, crawlspaces, basements, attached garages).
- Determine the thermal boundary of the home and identify thermal bypasses.
- Record type(s), amount, and condition of insulation in all components of the thermal boundary as are visibly accessible:
 - Attic flats, slopes, knee walls, knee wall flats, dropped soffits, etc., as appropriate for type of home and per configuration of additions.
 - Basement and crawlspace walls or ceilings.
 - Rim joists.
 - Attic staircase walls.
- Window inspection: Note condition of windows, type, age, signs of moisture damage, and air infiltration around windows.
- Door inspection: Note type and condition of all doors to exterior (including garage) – especially note if doors are un-insulated, in poor condition, or if they are leaky and in need of weather-stripping or door sweeps.
- Envelope air leakage characteristics:
 - Visual Inspection of attic and basement/crawlspace to identify paths of air leakage.
 - Look for visual signs of air leakage such as discoloration of insulation.
 - Attic: openings in wall top plates, electrical and plumbing runs, open areas around flues and chimneys, recessed light housings, around exhaust fans, open framing cavities, dropped soffits and ceilings.



- Basement/Crawlspace: openings around electrical and plumbing runs and around flue pipes and chimneys, accessible sill plate areas, basement windows, exterior doors, and accessible rim/band joist areas.

Heating, Ventilation, and Air Conditioning (HVAC) and Domestic Hot Water (DHW) Systems Visual Inspection

The HVAC and DHW systems can offer dramatic comfort and energy savings opportunities. Therefore, QHEC Subcontractors will perform a basic visual inspection of the HVAC and DHW systems in the home as follows:

- Determine number and type of thermostats:
 - Note number of heating and/or cooling zones.
 - Note whether thermostats are smart, programmable, or manual.
 - If programmable, check status of setback periods and, if not being used, educate homeowner on the benefits of scheduled setbacks based on their lifestyle.
 - All applicable smart thermostat programs should be mentioned as an opportunity.
- Visually inspect heating system:
 - Verify system information: age, model, general condition, and maintenance history.
 - Check for evidence of backdraft/flame roll-out.
 - If boiler, verify that pressure relief valve is present and not obstructed.
 - Check if exhaust vents are vented to the outside.
 - The HVAC Program should be mentioned as an opportunity as warranted.
- Visually inspect air conditioning system:
 - Verify system information: age, model, capacity (sometimes available on nameplate).
 - Note any issues around compressor/fan unit in yard, such as recirculation/air flow obstruction from built features or plantings or problems with coil blockage from leaves, twigs, or other debris.
 - Record number of window or wall units, model, and SEER if available.
 - The HVAC Program should be mentioned as warranted.
- Visually inspect distribution systems:
 - Inspect air filter(s) and ask homeowner how frequently they are replaced. Note the size of the air filter on the QHEC report.
 - Note the presence of any ducts or air handlers in garages (this requires a recommendation to re-locate or create air-tight enclosures to isolate them from garage and prevent transportation of carbon monoxide and other fumes from the garage to the living space).
 - Record levels of insulation on ducts in unconditioned spaces.



- Check for visual signs of ductwork leaks, disconnects, crimps, moisture presence, return leaks near combustion equipment, damage, or other atypical conditions (accessible areas only).
 - For hydronic systems, record insulation levels and note opportunity for pipe insulation, if practical, especially on long pipe runs if there are comfort issues.
 - For baseboard systems, check for condition and positioning of covers and for presence of dust, webs, and other material on the fins.
 - A discussion about the performance of the duct system and the Home Performance with ENERGY STAR® Program should be mentioned as warranted (this should not be the only instance in which this Program should be recommended).
- Visually inspect DHW system:
 - Record approximate age, model, capacity, condition.
 - Check for evidence of back draft/flame roll-out.
 - Verify that pressure relief valve is present and not obstructed.
 - Note temperature setting on water heater. This is a good opportunity to educate homeowner on standby losses and scalding threats if it's above 125 degrees F, and reduce the setting if homeowner approves (check temperature at nearest faucet).
 - Check for signs of leakage from water heater tank vessel.
 - Conduct visual inspection of water heater and hot water pipes for efficiency improvements (presence or lack of insulation, convective loop, and feasibility of retrofitting insulation on tank and/or pipes.)
 - Install pipe insulation (as appropriate) on hot and cold pipes from the water heater but be sure to keep at least a 6" separation from combustion vent pipe.
- Combustion appliance zone (CAZ) safety inspection:
 - Make sure that there are no flammable or explosive materials near any combustion source. This is a good opportunity to recommend moving them to a safe place.
- Living space safety inspection:
 - Note number, location and condition of CO detectors and smoke detectors in living space. Codes in some jurisdictions may require them. Suggest the purchase of a CO and or/smoke detector in all appropriate spaces if not present, and especially if there are any visual signs of back drafting of combustion appliances. Be sure to note this suggestion on the Customer Report. Customers should be educated that both CO detectors and smoke detectors have a specific lifespan (as do their batteries) and should be replaced on a periodic basis.
 - Note presence of unvented gas fireplaces and propane or kerosene space heaters and discuss with and educate the homeowner of any applicable safety implications.
- Inspect mechanical exhaust ventilation:
 - Check whether mechanical exhaust venting systems are in bathrooms and kitchen; if present, they are venting properly to the outside (as visibly accessible).



- Note presence and operability of power attic or whole-house exhaust fans and inform homeowner of correct operation.

Moisture Inspection

- Visually check basement and crawlspace for evidence of moisture and/or damage on basement floors, walls, sill plate area, around basement windows and bulkhead doors.
- Determine whether there is a continuous moisture barrier in the crawlspace.
- Check around exterior of foundation for signs of moisture from such sources as faulty gutters or from watering too close to the foundation.
- Check attic for evidence of moisture and/or damage on roof deck, rafters, joists, and insulation (wet or moisture-compacted insulation).
- Inspect condition of windows and look for signs of condensation or other conditions that could cause damage or affect durability.
- If there is evidence of high moisture levels in the living space, check for discoloration on walls behind headboards, furniture, corners of closets on exterior walls, and any other area where airflow may be stagnant and/or conditions that promote fungal growth.

Quick Home Energy Check-up Customer Report

Reviewing the findings with the customer is the culmination of the Quick Home Energy Check-up and is a vital part of the Check-up process. This is the opportunity to present the homeowner with improvement opportunities discovered during the Check-up and solutions for improving the performance of the customer's home. The subcontractor will also review and recommend the Home Energy Savings Program for which the customer is a good candidate.

The QHEC Mobile Tool findings should be reviewed with the customer in detail, so that any questions can be answered, and any recommendations explained.

Thank the customer at the end of your visit.

Administrative Processes

Reporting

ICF will provide utility bill / energy usage information to the subcontractor delivering the QHEC through the Mobile Tool.

The information collected in the Mobile Tool will automatically be submitted into the Sightline Tracking portal for payment processing.

Incentive Processing

ICF processes payments based on the Check-ups delivered and associated direct install items as entered in the mobile tool and verified in the Sightline Tracking database. These invoices will be provided to subcontractors for their own documentation at regular intervals.



Quality Assurance/ Quality Control

Customer Surveys

Customers may receive a satisfaction survey. This survey will be online if the customer has provided an email address. The subcontractor is not permitted to perform any additional services in addition to what is offered and supplied by the program at the time of the QHEC or during follow-up appointment for thermostat installation.

- In-field inspections may be utilized to address specific customer concerns and/or to validate work being completed and provide additional training to technicians. ICF program staff will attend mock QHECs (set up by the subcontractor) before the subcontractor will be approved to perform utility customer QHECs.
- If the subcontractor receives a serious complaint from a customer regarding the QHEC Program, the customer should be referred directly to ICF program staff.
- If any damage to a customer's property occurs during the QHEC delivery, the QHEC Analyst must immediately inform the proper contact at his or her employer, and this information must also be relayed to ICF program staff.

Performance Reviews

ICF will review a sample of subcontractor submitted projects quarterly. Subcontractors will be notified of results and required corrective action. Submitted data reviewed will include:

- Customer signatures
- Removed wattage pictures
- Thermostat installation pictures
- Verification of installed items

ICF runs reports to analyze subcontractor performance including:

- Number of customers referred to other programs, by program type
- Number of customers participating in another program after QHEC
- Number of direct install items per check-up
- Average Energy savings per check-up
- Average scoring on customer satisfaction surveys

ICF will conduct annual performance reviews of the subcontractor. Subcontractor performance, customer survey responses, and quarterly sampled projects will factor into potential contract extensions.



Health and Safety

As a result of COVID-19, subcontractors agree to take precautions to prevent the spread of the virus until further notice. The overriding principle is that all steps should be taken to ensure the protection of staff, clients, customers, and the public. It is paramount that staff do not feel forced to work if they become or feel unwell.

Employees shall adhere to CDC recommendations regarding the type of face covering worn and adhere to best practices for the wear, handling, cleaning, and disposal of PPE. Masks that are deemed effective by health officials shall be worn during service appointment dependent on the CDC Community Level. At a minimum, employees shall follow CDC guidelines for PPE and maintain awareness of best practices as they change and evolve over time. Employer policies and workplace procedures will be informed by industry guidelines and best practices, such as those established by the Building Performance Institute and other reputable industry-specific organizations.

- Personal Protective Equipment (PPE) – QHEC subcontractors are responsible for having their staff follow BPI Standards and OSHA Regulations regarding the use of Personal Protective Equipment during the delivery of a QHEC. This equipment should include, but is not limited to, the use of eye protection, head protection, and respiratory protection when entering areas such as an attic and/or crawlspace to inspect for air sealing, duct sealing, and insulation opportunities.
- Asbestos – If the presence of asbestos is suspected during a QHEC delivery, the QHEC Analyst should use the following policy in their interaction with the customer: Some materials that look like asbestos may not actually be asbestos. However, where the presence of asbestos is suspected, all relevant state and federal (EPA) guidelines must be followed to ensure technician and occupant safety. If you suspect the presence of asbestos, you may inform the homeowner that a material is suspected to contain asbestos, but make it clear to the customer that the only way to know definitely is to have the material tested by an accredited laboratory. Tell the customer that they should not touch it and should consider contacting an asbestos professional. You can refer the customer for additional information to the web sites listed below and/or suggest that the customer contact the Maryland Department of Environment's Division of Asbestos Licensing and Enforcement at 410-537-3200 to find a Licensed Asbestos Contractor. You can continue with the QHEC unless you feel that your health or the customer's health or safety is in jeopardy. Refer customer to the following web sites for more information:
 - **Asbestos in Your Home (good information for customers)**
<https://www.epa.gov/asbestos/protect-your-family-exposures-asbestos>
 - **List of Licensed Asbestos Contractors**
https://mde.maryland.gov/programs/air/Asbestos/Documents/Asbestos_Licensed_Contractor_List_April_2018.pdf
 - **Maryland Department of Environment Web Page for Air Programs**



<http://www.mde.state.md.us/programs/air/Pages/index.aspx>

- Gas Leak Policy – The following is the policy for Gas Leak Testing and Reporting for any QHEC Analyst in a customer's home performing work under the Quick Home Energy Check-Up.
 - **If the QHEC Analyst smells a gas leak:**
 - If the QHEC Analyst or customer smells gas, consistent with utility guidance, the QHEC Analyst and customer shall leave the home immediately and call the utility. Even homes that don't use gas could experience gas leaks coming through walls from the outside.
 - Calls for emergency gas service will be answered 24 hours a day, seven days a week. A utility service person will come to the home free of charge. **The QHEC Analyst is required to stay with the customer until the utility employee arrives.**
 - (Natural gas is colorless, tasteless, and odorless. An unpleasant odor is added to the gas so you will know if natural gas is escaping).
- Personal Safety: If the QHEC Analyst does not feel safe in the home or with the customer or observes illegal or questionable activity, they are permitted to politely terminate the QHEC and leave. They should notify their supervisor when safely away from the home, and the supervisor is required to report the termination of the QHEC. Illegal activity should be reported to the proper authorities.
- Presence of Minor Children: The QHEC may not be completed unless there is an adult over 18 in the home for the duration of the QHEC.
- Safety incidents in or outside of a customer's home must be reported within 24 hours to the QHEC Analyst's manager and reported directly to ICF program staff.

Additional Guidelines

The subcontractor is expected to attend any meetings/trainings, and submit any data requested within the designated period of time as stated by the ICF QHEC team. This includes but is not limited to:

- Bi-weekly Subcontractor Meeting
- QHEC Orientation
- Correcting Submittal Flaws

Subcontractors are prohibited from selling or recommending their own or any other services or products during the Quick Home Energy Check-up, and from any direct marketing of their services or products to the customer subsequent to Check-up delivery. Any subcontractor found to be proactively selling services or products to the customer or performing non-approved work outside



the scope of the QHEC will be removed immediately from the Quick Home Energy Check-up Program.