

Residential Turnkey Services Lead Vendor

Request for Proposal





	Residential Turnkey Services Lead Vendor Request for Proposal	RFP No.	FGE81624
		Page No.	TOC
		Date:	8/16/2024


Table of Contents

1.	Introduction.....	4
1.1	Background	4
2.	Scope of Work	4
2.1.	Brand	4
2.2.	Programmatic Changes	5
2.3.	Residential Management Committee	5
2.4.	Program Goals.....	5
2.5.	Services.....	5
2.6.	Accreditation	15
2.7.	Customer Telephone Line and Call Center.....	15
2.8.	HEAT Loan Administration	15
2.9.	Community First Partnership	16
2.10.	Safety Requirements for the Bidders/Lead Vendors	16
2.11.	Warranties.....	16
2.12.	General Conditions Regarding Material Installations by LV, HPCs and IICs.....	17
2.13.	Summary of Unitil Responsibilities	17
2.14.	Lead Vendor Performance Incentive	18
3.	Submission Requirements.....	18
4.	Administrative	19
4.1	RFP Schedule	19
4.2	Intent to Bid	20
4.3	Questions	20
4.4	Submission of Proposals.....	20
4.5	Award Notification	20
4.6	Ownership of Materials.....	20
4.7	Rejection of Proposals.....	21
4.8	Errors in Proposals	21
4.9	Confidentiality.....	21
4.10	Contract Terms and Conditions	21
4.11	Sustainability/Diversity.....	21

	Residential Turnkey Services Lead Vendor Request for Proposal	RFP No.	FGE81624
		Page No.	TOC
		Date:	8/16/2024

4.12 3rd Party Compliance Platform22

4.13 Vendor Security Requirements22

	Residential Turnkey Services Lead Vendor Request for Proposal	RFP No.	FGE81624
		Page No.	4
		Date:	8/16/2024

1. Introduction

Fitchburg Gas & Electric Light Co. (dba Unitil) is seeking responses to this Request for Proposal (“RFP”) to provide Unitil with Residential Turnkey Services Lead Vendor for the Mass Save® Program.

The Scope of Proposed Work is described in Section 2 below.

Each proposal should be prepared simply and economically, providing a straightforward, concise description of the Bidder’s ability to meet the requirements of this RFP. Emphasis should be on completeness, clarity of content, responsiveness to the requirements, and an understanding of Unitil’s needs.

By submitting proposals, each proposer certifies that it understands this RFP and has full knowledge of the scope, nature, quality, and quantity of the work to be performed, the detailed requirements of the services to be provided, and the conditions under which the services are to be performed. Each Bidder also certifies that it understands that all costs relating to preparing and responding to this RFP, including, but not limited to providing additional information and/or attending an interview will be the sole responsibility of the Bidder.

Should the Company find it necessary, modification to the RFP will be made by addenda.

1.1 Background

Unitil Corporation is a public utility holding company with operations in New Hampshire, Massachusetts and Maine. Unitil Corporation is the parent company of three wholly-owned distribution utilities.

Unitil Energy Systems, Inc. provides electric service in the southeastern seacoast and state capital regions of New Hampshire, including the capital city of Concord, New Hampshire;

Fitchburg Gas and Electric Light Company provides both electric and natural gas service in the greater Fitchburg area of north central Massachusetts; and,

Northern Utilities, Inc. provides natural gas service in southeastern New Hampshire, and parts of southern and central Maine, including the city of Portland, which is the largest city in Northern New England.

Together, these 3 distribution utilities serve approximately 108,000 electric customers and 88,000 natural gas customers in their service areas.

2. Scope of Work

2.1. Brand Unitil is a sponsor of the statewide brand, Mass Save®, and works in close collaboration with other Massachusetts’ Program Administrators (“PAs”) to ensure that the delivery of Residential Turnkey Services, or “RTS” program (the “Program”) (aka Residential Coordinated Delivery (“RCD”)), is uniform



**Residential Turnkey Services
Lead Vendor
Request for Proposal**

RFP No.	FGE81624
Page No.	5
Date:	8/16/2024

across the state.

2.2. Programmatic Changes The Program is operated under the Mass Save brand and is consistent with the statewide Program offered by all PAs. The Lead Vendor (LV) must express willingness and possess an ability to adapt to programmatic changes as may be required from time to time as statewide changes occur, and which is anticipated as the Company transitions to the next 2025-2027 three-year term. Programmatic changes may also be necessary as a result of statutory amendments or regulatory directives, or the development of a pilot Program or initiative, or changes necessitated based of the results of ongoing evaluation efforts.

2.3. Residential Management Committee The Residential Management Committee (“RMC”) is comprised of a representative of each PA, and manages and steers the Program. From time to time, the RMC makes modifications in the Program; the LV must keep abreast of new policies and programmatic changes.

2.4. Program Goals Unitil expects the LV to achieve the energy-savings Program goals while:

- I. Achieving maximum level of cost-effective energy savings per dollar spent
- II. Providing cost and value-added services not provided in basic Program pricing
- III. Achieving persistent energy savings through effective and appropriate recommendations of energy efficiency and electrification measures as well as pre-weatherization barrier remediation.
- IV. Focusing on cost effective energy efficiency measure installation rather than number of audits completed
- V. Improving participants comfort, health and safety and awareness of additional funding, financing, tax credits and technical assistance related to energy efficiency in general and the suite of Mass Save programs specifically (e.g. appliances, Connected Solutions, favorable rate options, etc.)

Further objectives are set forth in the description of services below.

2.5. Services The LV is responsible for the following:

- i. Customer screening, intake, and home energy assessment (“assessments” or “energy assessments”) scheduling, preferably in the customer’s language of choice
- ii. Contractor coordination and training (including the “on boarding” of new sub-contractors that will provide program services in the Company’s territory)
- iii. Performing energy assessments
- iv. Providing accurate and timely information about other available funding, PA-supported financing and other Mass Save rebates
- v. Assigning weatherization work to active Independent Installation Contractors or “IICs”
- vi. Promoting, distributing, and processing incentives to customers and/or vendors in a timely manner
- vii. Marketing support



Residential Turnkey Services Lead Vendor Request for Proposal

RFP No.	FGE81624
Page No.	6
Date:	8/16/2024

- viii. Quality assurance and control of installed measures
- ix. Secure data management and reporting/invoicing, including sub-contractors and IICs
- x. Payment to contractors
- xi. Customer and contractor complaint resolution
- xii. Financial Accounting Services

The LV is also responsible for attending specified meetings that are held in collaboration with other PAs, including but not limited to the bi-weekly Residential Turnkey Services or “RTS” and monthly best practices working group or “BPWG” meetings.

A. Customer Screening, Intake, and scheduling

1. The LV must receive and answer phone calls from customers who are requesting an energy assessment. The LV will screen the customers for Program eligibility, including verifying that they are within the Company’s territory, have not received an assessment in the previous 24 months, and are most likely ineligible for low income services, which are served by another entity.
2. The LV is responsible for efficiently scheduling and coordinating energy assessments for eligible participants, preferably in the language preferred by the customer.

B. Contractor coordination and training

1. The LV is responsible for recruiting, managing and training its own field staff, as well as the contracting (via Participation Agreement) of Home Performance Contractors or “HPCs”, IIC subcontractors, and eventually Heat Pump Installers. The LV must ensure that HPCs and IICs and any other contractors involved in the Program adhere to Program requirements.
 - a. IICs must be qualified weatherization contractors who meet PA-specified program requirements such as professional certifications, insurance, and background checks.

IIC Requirements and Qualifications:

- I. Criminal record and background checks for all staff
- II. A signed Participation Agreement with the LV
- III. MA Home Improvement Contractor’s License
- IV. MA Construction Supervisor’s License
- V. MA Lead Safe Certificate
- VI. Insurance as required by LV
- VII. Authorized boot camp and combustion safety certifications for installers
- VIII. Any Unitil specific requirements as necessary including but not limited to demonstrated ability to adhere to strict cybersecurity standards, and specific data delivery protocols

- b. HPCs must be qualified to perform both home energy assessments and install weatherization measures. Services provided must meet program requirements. HPCs must meet requirements such as professional certifications, insurance, meeting established



Residential Turnkey Services Lead Vendor Request for Proposal

RFP No.	FGE81624
Page No.	7
Date:	8/16/2024

performance metrics, and background checks.

HPC Requirements and Qualifications

- I. BPI Building Analyst certification for all auditors and BPI Building Analyst and Envelope certifications for at least one staff member.
- II. Criminal record and background checks for all staff
- III. A signed Participation Agreement with the LV
- IV. Massachusetts (MA) Home Improvement Contractor License
- V. MA Construction Supervisor's License
- VI. MA Lead Safe Certificate
- VII. Insurance as required by LV
- VIII. Authorized boot camp and combustion safety certifications for installers
- IX. Any Unitil specific requirements as necessary including but not limited to demonstrated ability to adhere to strict cybersecurity standards, and specific data delivery protocols

2. The LV will procure all equipment and materials necessary for Program implementation for LV responsibilities.

3. The LV will coordinate regular meetings with Unitil's participating IICs and HPCs to notify them of any Program changes and provide a forum for discussion of the Program. If the LV also provides services for another Massachusetts PA these meetings may be held jointly.

4. The LV must conduct an annual review of HPCs and IICs to ensure their compliance.

C. Performing home energy assessments

1. The LV should have the ability to provide different levels of energy assessments. Definition for each type of assessment may be found detailed in the **Mass Save Home Energy Assessment Standards Appendix A:**

- I. Screening Assessment
- II. Diagnostic Assessment
- III. Comprehensive Assessment
- IV. Special Home Visits



**Residential Turnkey Services
Lead Vendor
Request for Proposal**

RFP No.	FGE81624
Page No.	8
Date:	8/16/2024

V. Turnkey

2. Unitil, together with the LV, will offer a whole-house approach to the customer. The LV must demonstrate that it possesses both the diagnostic tools, as well as the technical capability necessary to comprehensively assess and address all efficiency opportunities from a whole-house perspective, including electrification of the heating load and other end uses such as cooking and laundry.

3. The home energy auditor will perform an assessment of all energy efficiency opportunities including thermal measures, HVAC system efficiency, combustion safety, screening existing refrigerator, cost-effectiveness of major measures, and address all health, safety and indoor air quality issues.

4. The LV must provide the customer with an energy assessment report at the time of the assessment. The report should provide the customer with energy efficiency opportunities in an easy to understand format. At minimum, the report must recommend efficiency measures, estimate the cost, the term of the payback, therm, kWh and cost savings. Payback and savings must incorporate Unitil's rates, which are updated once a year and now include a special discounted rate for residential customers with heat pumps used to fully or partially offset their heating load.

5. The LV will provide each customer with educational materials regarding energy use and efficiency opportunities, including any current or future initiatives. Unitil may require that the written materials are consistent with other PAs.

6. The home energy auditor must provide an opportunity for the customer to ask questions about the recommendations. The objective of the assessment is to provide customers with an opportunity to understand the recommended improvements and the resulting energy and cost savings or increases, thereby motivating the customer to implement major measures.

7. Special Home Visits (SHV) are designed to assist those customers who have a concern about high-energy use and request a site visit in order to address their concern. The SHV is also used to qualify a customer for a specific incentive, such as heat pumps, which require a SHV before an incentive can be issued or assist with questions about a particular piece of equipment or home efficiency measure.

8. To provide a Turnkey approach to decarbonization efforts, barrier mitigation, and heat pumps, the LV is responsible for:

a. Managing multiple contractor networks necessary for supporting turnkey delivery of decarbonization measures from scoping to scheduling to installations including:

i. Independent Installation Contractors

ii. Home Performance Contractors



**Residential Turnkey Services
Lead Vendor
Request for Proposal**

RFP No.	FGE81624
Page No.	9
Date:	8/16/2024

iii. Heat Pump Installer Network contractors who provide Turnkey installations

iv. Other trade allies such as electricians and other specialty contractors who provide evaluation and remediation services of pre-weatherization or pre-electrification barriers.

D. Assigning weatherization work to active IICs

1. The LV will distribute weatherization installation work orders to qualified IICs using equitable and transparent merit-based methodologies, and make meaningful effort to ensure that qualified Minority and Women Owned Business Enterprises (MWBE) are included in all recruitment, training and job assignments.

2. The quality of work should play a significant role in the merit-based allocation system. Assessing the quality of a vendor's work should consider:

a. Safe Work Practices, including working in accordance with all Local, State and Federal codes. Unitil has a zero-tolerance policy for unsafe or unethical work practices.

b. Technically sound installation practices conforming to the Building Performance Institute (BPI) approach or standard industry practices and Program standards.

c. Installation consistent with energy efficient upgrades offered or recommended at the time of assessment.

d. The frequency and nature of customer complaints, any necessary remediation, or repairs resulting from failed QA/QC.

e. The quality and integrity of data submitted by participating IICs relating to weatherization installation. At minimum this merit category should include:

i. Timeliness of submissions

ii. Accuracy of data

iii. Comprehensiveness of data

f. The LV is responsible for timely incentive payment directly to subcontracting IICs and HPCs for qualified and completed installations. The LV must track and report incentive payments to IICs and HPCs.

g. The LV must record and maintain records containing all pertinent information related to the work performed and measures installed in customer homes. The Company reserves the right to inspect all such records, or request that information be provided in isolation or in aggregate for the purposed of assessing, reporting, and /or evaluating program delivery.



**Residential Turnkey Services
Lead Vendor
Request for Proposal**

RFP No.	FGE81624
Page No.	10
Date:	8/16/2024

E. Promoting, distributing, and processing incentives

1. Expected 2025-2027 Program incentives can be found in **Appendix D – 2025 Electric/Gas Incentive List**

Common statewide pricing related to weatherization installation for IICs and HPCs will be established by the PAs and provided to the LV. As the Program continues to evolve, incentives may be changed, based on cost-effectiveness, market evolution, regulatory or evaluation results.

2. The LV is expected to promote all available/applicable incentives offered via statewide residential energy efficiency Programs, such as Residential Rebates (aka Residential Retail), Connected Solutions or Residential New Homes/Renovations.

3. The LV will also be expected to keep apprised of program eligibility rules for low and moderate income customers, be prepared to refer eligible customers to the Income Eligible Turnkey Program, and offer 100% rebates to customers who qualify either by attestation or income screening for the moderate income offerings.

4. PAs work together in order to offer all available energy efficiency measures on a fuel-blind basis. The LV will be expected to “piggyback” measures with the other LVs and PAs to ensure seamless delivery to the customer. The LV serving as the Unitil LV will be expected to contract with the gas or electric PA(s) sharing customers within Unitil’s service territory in order to offer and provide incentives for which the customer is eligible.

5. From time to time, usually as a result of a special Program, the LV may be asked to process incentives checks for current and future initiatives. Examples include the incentives for Pre-Weatherization Barriers, Turnkey Heat Pumps, panel upgrades, building permits, etc.

F. Marketing Support

1. The LV shall coordinate Program marketing with the Statewide Marketing Vendor and Unitil to maximize Residential Turnkey participation and avoid duplicating marketing efforts. Marketing objectives include:

- a. Increase consumer awareness of and participation in the Mass Save energy efficiency, electrification, and demand response programs to reduce energy use and GHG emissions.
- b. Encourage and facilitate equitable program participation and distribution of benefits.
- c. Drive reduction of GHG emissions via electrification and weatherization.
- d. Drive program participation among LOTE (Languages Other Than English) customers.
- e. Build awareness of Mass Save as a trusted statewide resource for all things involving energy efficiency and decarbonization needs.



**Residential Turnkey Services
Lead Vendor
Request for Proposal**

RFP No.	FGE81624
Page No.	11
Date:	8/16/2024

f. Ensure adequate and effective reach to all customers, including customers in the Environmental Justice Community of Fitchburg and those who have not yet participated in Mass Save programs, through diverse, strategically selected, media channels (digital, radio, public transit, social media, etc.).

g. Encourage positive experiences and satisfaction among customers to naturally lead to the organic spread of positive word-of-mouth referrals within the community, and to foster connections and trust among neighbors.

3. Program awareness and marketing is accomplished using several mediums, many funded jointly on a statewide effort. Historically, the Program has been marketed through bill inserts, radio, direct mail, billboard advertising, online ads, community-based marketing, and public forums. The LV will implement enhanced targeted marketing campaigns, including the promotion of specific energy efficiency enhancements.

4. The LV will be required to reproduce collateral for distribution to customers. The LV also must be prepared to provide the customer with a list of Program approved IIC's.

5. Additional LV responsibilities include drafting, developing and producing forms and other printed materials necessary for implementation of the Program. All forms must be submitted to Unitil for approval and finalized prior to use by LV.

6. Given the small size of Unitil's gas and electric territory, the LV should demonstrate an awareness of, or experience in utilizing relevant marketing channels, including relationships with nonprofit and public service institutions.

G. Quality assurance and control

1. The LV will be responsible for providing QA/QC services. In addition to this service, a statewide QA/QC Vendor (procured by the PAs through a separate RFP) is responsible for an independent review of both home energy assessments and installed measures.

a. The statewide QA/QC Vendor will perform additional quality assurance inspections of Program services and installations according to BPI and Unitil requirements. These will include both in-field/in-process, post-assessment and post-installation evaluations.

b. The LV will ensure that identified issues are resolved timely and satisfactorily, and the actions taken are reported to Unitil on a timely basis.

2. The LV will have in place procedures for Quality Assurance/Quality Control (QA/QC) of all home energy assessments, performed by both the LV and HPCs. Unitil requires the LV to perform in field QA/QC for approximately fifty percent (50%) of weatherization projects.

a. The LV shall submit a monthly report containing a description of the QC activities.



**Residential Turnkey Services
Lead Vendor
Request for Proposal**

RFP No.	FGE81624
Page No.	12
Date:	8/16/2024

3. The LV will track the schedules for both HPCs and IICs and provide those schedules in a timely manner to the QA/QC vendor(s) so that QA/QC assessments may be conducted.
4. The LV shall inform the customer, prior to beginning any work, that Unitil (or the customer) may request an inspection of the completed installation to ensure that the materials were used and installed in accordance with the installation specifications.
5. The LV shall inform the customer that post- installation inspections are available upon request and are at no cost to the customer.
6. The LV will have a systematic approach for assuring the quality of all work performed by its internal staff, HPCs and IICs. This should include defined metrics to evaluate performance of auditors, HPCs and IICs.
7. The LV should share the aggregate results of the QA/QC with HPCs and IICs on a regular basis. In addition, the LV shall provide Unitil with regular updates on the evaluation of each IIC and HPC.
8. The LV must monitor customer satisfaction after the assessment and post-installation via QA/QC visits, phone surveys, or email or written surveys. Evaluation of customer satisfaction should include measuring:
 - a. Reliability, including cancellations of scheduled appointments
 - b. Professionalism of crew
 - c. Complaint resolution
 - d. Prompt service
 - e. Cleanliness of the worksite
 - f. The presentation of the energy assessment results and available incentives by the Auditor
 - g. Satisfaction of results (i.e. comfort, lower bills, etc.)

H. Secure Data Management and reporting and invoicing

1. The LV and its subcontractors must utilize software that is consistent with that of other LVs in the statewide program and ensure the security of customer data in accordance with both State law and Company policy.
2. The LV must provide home energy assessment software to the HPCs and IICs for their use to make specific recommendations on-site and provide a written assessment to every customer at the time of the audit.
 - a. If a state or federal standard software tool is adopted, then all Residential turnkey service



Residential Turnkey Services Lead Vendor Request for Proposal

RFP No.	FGE81624
Page No.	13
Date:	8/16/2024

providers will be required to utilize software that complies with the federal standard.

b. The Assessment must provide the customer with a comprehensive review of the customer's energy usage, as well as specific recommendations to improve the home's energy efficiency within Program guidelines.

2. Utilize Unitil's computerized tracking system to upload detailed information regarding measures installed at each customer location where work is performed. As data requirements evolve, the LV must be able to adapt to the collection and reporting of data related to both the building, the customer and the measures, including but not limited to:

Building Attributes:

Number of units served in the building

Number of rental units served in the building

Building Address

Premise Number (per Unitil CIS)

Customer Attributes:

Name of utility account holder

Utility account number

Owner or renter status

Moderate income self-attested

Moderate income screened

Customer preferred language (English, Spanish, Portuguese, etc.)

If installation vendor provided language support

Measure Attributes:

Measure ID

Measure name

Measure description

Description of quantity (sq. ft., tons, units, etc.)



**Residential Turnkey Services
Lead Vendor
Request for Proposal**

RFP No.	FGE81624
Page No.	14
Date:	8/16/2024

Quantity of measures offered

Rebate per quantity

Energy savings per quantity

Measure life

3. The LV must be capable of aggregating all information provided by the IICs and HPCs for customer reports/invoices and sending data securely to Unitil to be uploaded to Unitil's eTrack+ tracking system.

4. Provide a combined invoice supported by a comprehensive data upload to eTrack on a monthly basis according to a mutually agreeable reporting schedule.

5. Maintain internal management tools that allow for tracking customers from initial inquiry to implementation of work, which may span a multi-year period over which time savings assumptions and program requirements may change.

6. Continuous Program activity tracking and monitoring will be the responsibility of the LV. The LV must collect and manage data necessary for its own monitoring and project management; PA oversight of the Program; as well as the monthly reporting required by the Department of Energy Resources and Department of Public Utilities; and for any Program evaluations conducted by outside evaluation vendors engaged by Unitil.

a. LVs must be capable of providing information related to metrics such as overall savings achieved, time to serve, implementation conversion rates, QA/QC issues/ratings, renters served, etc.

7. Submit a monthly report to Unitil on LV activities, including Home Energy Assessments, walk-away audits, health and safety barrier tracking, installations and saved kwh and therms in a format to be determined by Unitil.

I. Payment of contractors

1. The LV is solely responsible for developing a compensation structure for subcontractors. Contractors must be paid for work completed in a timely manner.

J. Customer and contractor complaint resolution

1. The QA/QC Vendor may act as an independent arbitrator between the LV and the IICs and HPCs in the event of a dispute between a customer and a contractor, or contractor and LV and must promptly respond to any customer complaints or inquiries and address issues.

K. Financial Accounting Services



Residential Turnkey Services Lead Vendor Request for Proposal

RFP No.	FGE81624
Page No.	15
Date:	8/16/2024

1. The LVs accounting systems must be sufficient to track all payments, liabilities incurred, receivables, and material and equipment inventories.

2. The LV must maintain records and accounts of chargeable costs in accordance with generally accepted accounting practices consistently applied and in such a manner as to permit verification. Duplicates of all invoices, supporting documentation and financial reports submitted shall be kept on file at the LV's place of business.

2.6. Accreditation

A. The LV must be an accredited business by the Building Performance Institute (BPI). The Program requires BPI Building Envelope and Analyst certification for all internal LV field staff. Unitil will not compensate the LV for any auditor training costs associated with auditor certification.

2.7. Customer Telephone Line and Call Center

A. The LV is required to maintain and staff a toll-free customer service and information telephone number(s) for contractors and customers seeking information including calls forwarded from any statewide contact center.

2.8. HEAT Loan Administration

A. Participation in the Mass Save HEAT Loan Program, administered through both gas electric companies, is open to all owners of one to four-family homes, who have a residential natural gas and/or electric account(s) with an investor-owned electric company.

B. The LV will inform each customer receiving a home energy assessment about the HEAT Loan Program and will provide the customer with information on how to apply. An application for the HEAT Loan will be included in each audit packet presented to the customer.

C. The LV will prepare and process HEAT Loan Authorization Forms for eligible submissions.

D. The LV will follow-up with customers who indicate on their contract that they will be applying for the HEAT Loan and assist customers in the resolution of any issues relating to the HEAT Loan Program.

E. The LV will provide training on Program details and processes to field and call center staff:

I. Review contractor proposals and required supporting documentation to verify Program eligibility, including any follow up, if documentation or information on the application is incomplete or requires clarification.

II. Track workflow process including interactions with customers, job status and required project data.

III. Bi-monthly reporting to the Statewide Interest Subsidy Payment Agent, who processes interest payments to lenders, in an agreed upon format.



Residential Turnkey Services Lead Vendor Request for Proposal

RFP No.	FGE81624
Page No.	16
Date:	8/16/2024

- IIV. Process Certificates of Completion when projects are completed.
- V. Conduct on-site post-installation verification inspections of projects financed with a HEAT Loan.
- VI. Monthly invoicing to PAs for services provided.

2.9. Community First Partnership

- A. The LV may be responsible for assisting Unitil in providing outreach to priority customer groups, particularly those who are located in geographic areas where there is low historic participation in PA programs and that are identified as Environmental Justice communities. For Unitil’s service territory, this would include the City of Fitchburg.
- B. The LV would need to work with Unitil, Fitchburg municipal staff, and community partners to facilitate collaborative outreach and education to support residents in accessing programs.
- C. The LV would be required to track and report participation from these outreaches to help achieve any mutual goals, including but not limited to a participation goal for work completed.

2.10. Safety Requirements for the Bidders/Lead Vendors

- A. The LV will be required to take the following safety measures:
 - I. Take appropriate action upon identification of any potential hazard(s) at a customer’s home (e.g., improperly vented combustion equipment, gas leaks, etc.)
 - II. Adhere to BPI procedures for identification and testing for all potential health and safety issues, as appropriate/applicable to Program standards.
 - III. Adhere to all applicable state and local regulations and codes.
 - IV. Ensure all contractors will adhere to all above safety measures, where applicable
 - V. Report any and all accidents, damages or hazardous conditions to Unitil within 24 hours.

2.11. Warranties

- A. The LV shall provide to a participating Unitil customer a warranty covering the materials and labor for at least one year or, if longer, the warranty periods customarily provided by the LV.
- B. The warranty shall commence on the day that the installation is completed. In addition, all manufacturers and other applicable warranties shall accrue to the benefit of the participating Unitil customer and the LV shall provide to such customers documentation relating to such warranties. Such warranties shall render vendors solely responsible for the performance of the products and for responding to all complaints of product malfunctions or failures, or problems caused by, or resulting from, the product installation for the stated period.



**Residential Turnkey Services
Lead Vendor
Request for Proposal**

RFP No.	FGE81624
Page No.	17
Date:	8/16/2024

C. The LV will require the same level of warranty be provided by all applicable subcontractors. Failure of subcontractors to honor warranties will result in dismissal from participation in the Program.

2.12. General Conditions Regarding Material Installations by LV, HPCs and IICs

- A. The LV shall not install any materials without prior written approval of the customer and/or property owner.
- B. All work shall be performed in a professional manner and will be consistent with all applicable safety standards.
- C. All installed materials shall be consistent with the application and be sufficiently durable to ensure measure performance.
- D. At all times the LV shall keep the customer work site free from accumulations of waste material or rubbish related to the performance of the work.
- E. Upon completion of the work, all rubbish, tools, equipment, surplus material and supplies shall be collected leaving the location free from any debris and in “broom clean” condition.
- F. The proper, safe, and lawful disposal of all items used or removed during implementation of the Program including, without limitation any substances considered hazardous and/or toxic under state or federal law or regulation, is the sole responsibility of the LV and its subcontractors.
- G. Upon request, the LV shall advise Unitil and the applicable customer(s) of the practices, use, storage, treatment, handling and disposal of such hazardous and/or toxic materials, and other material and equipment removed from the customer’s location in the course of the work.
- H. The LV shall also provide on request, documentation (including, without limitation, certificates and manifests) evidencing proper use, storage, treatment, transportation, handling, and disposal of such material and associated property and equipment.

See **Appendix B – Mass Save Program Materials & Installation Standards**

2.13. Summary of Unitil Responsibilities

- A. Provide customer information to the LV to assist with marketing efforts: including names, addresses, account numbers, telephone numbers, emails where available, annual consumption, past participation, rate codes, and referrals from other Programs.
- B. Ongoing Program development and refinement, in conjunction with other PAs and stakeholders.
- C. Unitil shall provide monitoring and oversight of LV performance, including:
 - I. Reviewing and approving any change orders or modifications to Program implementation procedures



Residential Turnkey Services Lead Vendor Request for Proposal

RFP No.	FGE81624
Page No.	18
Date:	8/16/2024

II. Reviewing and approving all forms, Program materials, procedures, protocols and software proposed for use by the LV in implementing the Program

III. Reviewing all management reports from the LV

IV. Reviewing the quality and conduct of work performed, including conducting random site inspections through a third-party quality control vendor.

V. Monitoring and tracking the resolution of customer complaints or inquiries

VI. Verifying, approving and processing LV invoices submitted to Unitil

D. Providing a principal Unitil point of contact(s).

2.14. Lead Vendor Performance Incentive

A. Unitil will consider providing performance incentives to the LV for the successful implementation of the RTS Program. Successful implementation is the achievement of established Program savings goals in a cost-effective manner. The bidder may propose a performance incentive structure, however, Unitil reserves the right to award this contract without acceptance of the proposed performance incentive structure.

3. Submission Requirements

A. This section of the RFP provides specific instructions regarding the correct format and content of proposals. Proposals shall include all information required by this RFP. Failure to conform to the instructions may be grounds for disqualification.

1. The Bidder shall provide a brief transmittal letter on business stationery with company logo. An individual authorized to bind the company to all statements in the proposal, including services and pricing must sign the letter.
2. Please provide (3) references from customers that have engaged your organization in similar agreements. Be sure to include the name, title, phone number and e-mail address of the person who may be contacted by the Company.
3. Bidders shall quote a fixed dollar unit cost per line item for each service to be provided.
4. Bidders must submit the following information and documentation with a proposal in order to be considered a Bidder for this RFP.
 - a. Detailed description of the proposed approach for implementing all of the requested services as outlined in **(Section 2.5 of the Scope of Work)**. Indicate the title of the service and provide a detailed description under each service's title.
 - b. List of all staff who will provide the services and, for each, a summary of their qualifications, including technical training, licensing, (e.g. 50 BPI Certified Envelope Professional Energy Auditors)
 - c. If Bidder intends to hire additional staff to provide proposed services, a description of its approach to hiring and the qualifications it will require of employees



Residential Turnkey Services Lead Vendor Request for Proposal

RFP No.	FGE81624
Page No.	19
Date:	8/16/2024

- d. A description of the sales training provided to field staff
- e. Current call center operational capacity including, number of full-time call center staff, current hours of operation and call volumes handled for each of the previous 3 years.
- f. Detailed description of the approach to communicating with Unitil
- g. Complete description of LV technological capabilities and cybersecurity protections in the areas of Information Management Systems hardware and software, electronic data transfer, rebate processing capabilities and weatherization and electrification related technology.
- h. LV is required to have/obtain suitable office, dispatch and warehouse facilities and vehicles as necessary, located within easy access to all parts of the UNITIL service territory (Identify the planned facilities and equipment to be used in Program implementation and identify the extent to which such facilities and equipment are already on hand. If acquisition of facilities and equipment is required, a timeline should be provided in the proposal.)
- i. List other similar contracts in force in Massachusetts and/or in other jurisdictions along with the names or references to be contacted regarding performance for Programs that are within the size and scope of the Residential Turnkey Program
- j. Explain and provide assurances that as the LV will be ready and able to provide services on the first day of the contract period, and a plan for the transition of work from the current LV so that the quality of customer service will not be affected
- k. Provide specific plans to address hard-to-reach customer groups, including landlords, renters, moderate income customers, and customers who speak English as a second language.
- l. Your organization's Warranty policy
- m. Bidders are to document any exceptions to Lead Vendor Roles and Responsibilities or contract terms and conditions (Appendix C).
- n. Unitil encourages Bidders to respond to other PA solicitations for a LV. If applicable, the Bidder should explain any potential cost efficiencies that may result from serving as the LV for multiple PAs.

4. Administrative

4.1 RFP Schedule

The following outlines the schedule for the RFP process. Unitil reserves the right to change these dates and will notify Bidders in such a case.

RFP Schedule

Event	Time	Date
RFP Released		8/16/2024
Intent to Bid Due	5:00 PM EST	8/30/2024



Residential Turnkey Services Lead Vendor Request for Proposal

RFP No.	FGE81624
Page No.	20
Date:	8/16/2024

RFP Questions Deadline	5:00 PM EST	9/06/2024
Proposal Due	1:00 PM EST	9/20/2024
Bid Awarded	1:00 PM EST	9/27/2024

4.2 Intent to Bid

All interested bidders must submit their 'Intent to Bid' no later than Friday, August 30th by 5:00 PM EST in the Bonfire portal. Submission of this intent constitutes the Bidders' acceptance of the RFP schedule, procedures, evaluation criteria and other administrative requirements. Bidders who do not notify us of their intent to Bid will be disqualified from further participation in this RFP.

4.3 Questions

Submit questions in writing via the Bonfire portal. No telephone questions will be accepted or considered. Bidders should refer to the specific RFP paragraph number and page and should quote the passage being questioned. Unitil will respond to questions as per the RFP Schedule and will send answers to Bidders as a group. Unitil will remove Bidder names from the text of the questions and answers being sent. The deadline date for submission of questions is Friday, September 6th by 5PM EST.

4.4 Submission of Proposals

Proposals are due Friday, September 20th by 5 PM EST. **Submission bids via the Bonfire website is mandatory**; no hard copies will be accepted. Bids **MUST** be received in Bonfire by the due date and time in order to be considered.

**we recommend NOT waiting to the last minute to upload your proposal and accompanying documents.

4.5 Award Notification

After winning bid is selected, the winning Bidders will be invited to negotiate a contract with Unitil; remaining Bidders will be notified in writing of their selection status.

4.6 Ownership of Materials

All materials submitted in response to this RFP will be considered property of Unitil. Proposals and supporting material will not be returned to Bidders. Unitil expressly reserves the right to utilize any and all ideas submitted in the proposals received unless covered by legal patent or proprietary rights which must be clearly noted in the proposal submitted in response to the RFP.



**Residential Turnkey Services
Lead Vendor
Request for Proposal**

RFP No.	FGE81624
Page No.	21
Date:	8/16/2024

4.7 Rejection of Proposals

This RFP does not commit Unitil to select a Bidder or to award a contract to any Bidder. Unitil reserves the right to accept or reject, in whole or in part, any proposal it receives pursuant to this RFP.

4.8 Errors in Proposals

Unitil is not liable for errors in Bidder proposals. A Bidder may correct an error in its proposal with Unitil's approval. Changes after the submission date may be made only to correct an error in an existing part of the proposal. New material may not be submitted, unless requested by Unitil.

4.9 Confidentiality

All information provided by Unitil in this RFP or subsequent verbal or written communications shall be considered confidential and for express use only in connection with the preparation of the RFP response. Bidders may not use, disclose, or duplicate this RFP or any information contained herein for any purpose other than responding to this RFP.

4.10 Contract Terms and Conditions

Winning Bidder shall be required to complete contractual requirements, including but not limited to, execution of Standard Agreement, Non-Disclosure Agreement and Background Check Affidavit. Assessment. Bidder shall note any exceptions to Terms and Conditions when submitting proposal.

4.11 Sustainability/Diversity

We are committed to sustainable practices and a responsibility to the environment as we work to expand clean energy choices for our customers and ensure a reliable and affordable energy supply. Sustainability requires engagement at all levels of our organization in order to achieve long-term value. We are committed to reducing company-wide (Scope 1) greenhouse gas emissions from 2019 levels by at least 50 percent by 2030 and to net-zero emissions by 2050.

We are strongly committed to increasing supplier diversity and have been working across the energy efficiency and global supplier diversity teams to identify all the ways that we can achieve this mutual goal.

Our mission is to encourage all of our suppliers and service providers to join our commitment in our sustainability and diversity initiatives. Please complete the Sustainability and Diversity Questionnaire attached as Exhibit E.



**Residential Turnkey Services
Lead Vendor
Request for Proposal**

RFP No.	FGE81624
Page No.	22
Date:	8/16/2024

4.12 3rd Party Compliance Platform

Winning bidder must register in Unitil’s 3rd party compliance platform, Avetta. There is no cost to the vendor to connect to Unitil. Avetta partners with Unitil to ensure that we meet our ever-increasing regulatory and internal compliance requirements by continuously monitoring COIs, IT security requirements, supplier diversity, ESG, sustainability initiatives, safety records, etc. of the suppliers we are doing business with.

4.13 Vendor Security Requirements

Unitil is vigilant regarding the protection of customer, medical, personal and financial information (collectively “Sensitive Data”) entrusted to us and to our vendors. Winning bidder must be in full compliance with Unitil’s security requirements throughout the duration of any contract.

Appendix A – Mass Save Home Energy Assessment Standards

Appendix B – Mass Save Program Materials & Installation Standards

Appendix C – Unitil Standard Agreement w/Vendor Security Requirements

Appendix D – 2025 Electric/Gas Incentive List

Appendix E – Sustainability & Diversity Questionnaire

Appendix F – Background Check Affidavit

Appendix G – Non-Disclosure Agreement