

## TOWN OF ARLINGTON

### REQUEST FOR PROPOSAL (RFP) HOME PERFORMANCE CONTRACTOR SERVICES

RFP #23-32

The Department of Planning and Community Development (DPCD) acting through the Town Manager is requesting proposals from Mass Save participating Home Performance Contractors to provide marketing support, customer intake and triage, and direct service related to the ongoing campaign to promote and coordinate delivery of energy assessments, weatherization, and HVAC upgrades in 1-4 family residential buildings. We seek vendors to leverage existing utility and state programs and create processes that remove barriers to serve renters and landlords, residents whose primary language is not English, and moderate-income residents (defined as 60–80% of state median income).

A copy of the RFP outlining the requirements for submission is available from the Town website <http://www.arlingtonma.gov/purchasing>.

Proposals are invited and will be received on or before 10:00 a.m., Thursday, April 27, 2023, at the Town Manager/Purchasing Department, Town Hall Annex 2<sup>nd</sup> floor, 730 Massachusetts Avenue, Arlington, MA 02476.

Proposers requiring clarification or interpretation of the RFP shall make a written request to Mary Ellen De Natale, Purchasing Agent, at [mdenatale@town.arlington.ma.us](mailto:mdenatale@town.arlington.ma.us). The Town will only answer such requests if received seven (7) days prior to the proposal due date.

Three (3) copies of the proposal, plus one thumb drive containing an electronic copy of the proposal, shall be submitted in a single sealed envelope plainly marked with the name, address and phone number of the respondent and with the words “RFP #23-32 Home Performance Contractor Services” Proposals delivered after the appointed time and date or that are submitted via facsimile or email will not be considered.

The Town reserves the right to cancel the RFP process, and to reject in whole or in part any and all proposals, when it is deemed in the best interests of the Town to do so.

Sanford Pooler  
Town Manager

April 13, 2023

**REQUEST FOR PROPOSALS #23-32**  
**TOWN OF ARLINGTON**  
**HOME PERFORMANCE CONTRACTOR SERVICES**

**Responses Due:** April 27, 2023, at 10:00 AM  
Late Responses Will Be Rejected

**Deliver Complete Responses To:** Town of Arlington  
Town Manager/Purchasing Dept.  
Town Hall Annex 2<sup>nd</sup> floor  
730 Massachusetts Avenue  
Arlington, MA 02476

**For Further Information Contact:** Mary Ellen De Natale, Purchasing Agent  
[mdenatale@town.arlington.ma.us](mailto:mdenatale@town.arlington.ma.us)

**I. OVERVIEW/ PURPOSE/ PROJECT GOALS**

The Town of Arlington’s Electrify Arlington campaign is working to increase awareness of and measurable participation in energy efficiency offerings, specifically residential weatherization and heating and cooling (HVAC) upgrades. Electrify Arlington has a goal of supporting the transition from fossil fuels to clean, electric sources of energy in residents’ homes and vehicles, all in pursuit of the Town’s goal of net zero greenhouse gas (GHG) emissions by 2050, per the Town’s 2021 Net Zero Action Plan (NZAP).

The Town of Arlington (the Town), acting through its Department of Planning & Community Development (DPCD), seeks a Home Performance Contractor (HPC) to provide marketing support, customer intake and triage, and direct service related to the ongoing campaign to promote and coordinate delivery of energy assessments, weatherization, and HVAC upgrades in 1-4 family residential buildings. We seek vendors to leverage existing utility and state programs and create processes that remove barriers to serve the following target populations:

- Renters and landlords
- Residents whose primary language is not English
- Moderate income residents (defined as 60–80% of state median income)

There will be no financial relationship between the Town and the HPC. It is expected that all activities executed by the HPC on behalf of the program will be funded through the HPC’s marketing budget with the assumption that the Town’s and the Electrify Arlington campaign’s co-branding will increase the efficiency and effectiveness of the HPC’s marketing spend and provide access to new sets of customers.

## II. BACKGROUND INFORMATION

The Town is governed by a five-member Select Board and Representative Town Meeting. Daily management is vested in a Town Manager appointed by the Select Board. Planning and development are controlled by Massachusetts General Law, the Arlington Town Manager Act, the Town Bylaws, and the Arlington Zoning Bylaw. The Town is served by Eversource for electricity and National Grid for gas.

The Select Board voted in 2018 to establish a Clean Energy Future Committee (CEFC). The mission of the CEFC is to guide the Town of Arlington to a future where, by 2050, net emissions of carbon dioxide and other GHGs attributable to all sources in Town are zero. The Committee is charged with identifying short and long-term energy goals; facilitating research studies, projects, and collaborations; enlisting the support of residents and businesses; recommending changes to laws and regulations; seeking state and local funding; and taking any other actions necessary for Arlington to achieve net zero carbon emissions by 2050.

In February 2021, the CEFC completed a [Net Zero Action Plan](#) to guide Arlington to net zero greenhouse gas pollution by 2050. Key to this plan are actions related to community energy use reduction and electrification of home heating and cooling systems and appliances. The CEFC launched the [Electrify Arlington](#) campaign in 2022 in order to promote community-wide uptake of energy efficiency measures and adoption of clean energy technologies. Electrify Arlington supports residents and businesses to access state and federal rebates, provides free heat pump coaches to residents, and offers educational events.

In 2022, the Town was awarded two grants to support the Electrify Arlington campaign: the Mass Save Education Grant for 2023 and the Community First Partnership (CFP) for 2023-2024 (contingent upon achievement of targets). Both grants strive to increase participation among renters and landlords, non-English speaking/Limited English Proficiency residents, low-to-moderate income households, and small businesses through targeted outreach. In Arlington, as of 2020, 42% of homes are renter occupied, 54% of the population lives in Environmental Justice census tracts, 34% of the population is low and moderate income (under 80% AMI), and 21% of the community speaks a language other than English at home (including 3% Mandarin/Cantonese, 3% Spanish, 2% French/Haitian/Cajun, 3% Asian/Pacific languages). Electrify Arlington grant funds will support marketing materials, supplies, and a part-time Energy Advocate to promote the Mass Save program. The selected HPC will be instrumental in the Town's achievement of targets associated with both grants and the Town's net zero goals.

The Town therefore seeks qualified HPCs to work with sustainability staff, the CEFC, volunteers, and state and utility representatives to provide opportunities for community members to improve the energy performance of their homes and businesses in Arlington. The Town understands the barriers that have prevented energy efficiency upgrades in some cases and seeks a provider to apply a comprehensive approach to overcome these challenges and achieve substantial energy savings on a town-wide basis.

### **III. SCOPE OF SERVICES**

The HPC will work closely with the Sustainability Manager, Energy Advocate, CEFC, and Electrify Arlington community volunteers. The Town seeks proposals from HPCs capable of marketing and installing energy efficiency improvement measures, assessing a variety of elements of the whole building energy performance, providing courteous customer service, collecting and managing utility data, and sharing data regularly. While Electrify Arlington targets 80 weatherization (Wx) installations, 100 HVAC upgrades, and 20 small businesses per year through 2024, HPCs shall include reasonable targets for assessments and retrofits in their proposal along with a detailed scope of services that addresses the following elements.

#### Task 1 - Marketing and Outreach:

Though residents and businesses will be allowed to access programs through any allowed pathway, the Town will guide individuals to the selected HPC as the primary entry point for moderate income and market rate energy assessments. The selected HPC will have access to the logos and seals of the Town for approved uses in order to conduct co-branded marketing efforts. All marketing pieces using the Town's or Electrify Arlington's names, logos, or seals, or referencing the affiliation, must be approved by the Town and its designated representatives.

Marketing efforts might include:

- Field marketing through tabling at public events or door-to-door canvassing
- Direct mail via letters or postcards to Arlington residents
- Digital advertising via search engines, social media, and online advertising
- Reverse 311 messages
- Print advertising
- Radio advertising
- Public displays such as banners or billboards

The Town will collaborate with the HPC on additional ideas to connect residents with no-cost energy assessments, such as mobilizing volunteer resources to support outreach efforts; introducing the HPC to key institutions in the town, like houses of worship, neighborhood associations, and community organizations; and encouraging collaboration by these institutions with the HPC.

Through the combined impact of these marketing efforts, the Electrify Arlington campaign should exceed its goals of 80 residential weatherization installations, 100 residential HVAC upgrades, and 20 small business energy efficiency upgrades annually.

#### Task 2 - Customer Intake and Service Delivery:

The HPC should maintain a call center capable of handling inbound calls and making outbound calls to interested residents identified by the Electrify Arlington campaign. The HPC should have customized protocols for scheduling energy assessments for all interested and qualified residents, including:

- Landlords of 1-4 unit buildings
  - With multiple properties
  - With mixed income tenants
- Renters in 1-4 unit buildings
- Non-English speaking customers
  - Mandarin
  - Japanese
  - Spanish
  - Portuguese
  - French
  - Haitian Creole
  - Arabic
- Moderate income residents who are eligible for enhanced weatherization incentives

In addition, the HPC must have a streamlined process to refer unqualified residents or business representatives to appropriate programs / vendors including:

- Income-eligible customers
- Customers who live in buildings or associations with more than 4 units
- Customers who had program visits within 2 years and/or have completed all eligible weatherization measures but are interested in or qualified for HVAC upgrades
- Small businesses

The HPC should design processes to deliver equitable service to all qualified customers, which may include:

- A process for renters who desire to benefit from the program, but do not want to involve their landlord
- The ability to communicate and deliver services in languages other than English including:
  - Appointment confirmation emails and calls or other pre-assessment communications
  - Conducting virtual or in-person home energy assessments
  - Post-assessment communications, including contract follow up, weatherization scheduling, HVAC referrals
  - Weatherization installation
  - HVAC process (internally or through referrals)
- A process to refer customers to upgrade their HVAC systems that aligns with program prioritization of heat pumps

### Task 3 - Data Sharing:

The selected HPC must establish a process to collect and share with the Town, or another organization it designates, certain data points for all customers served, including data of those customers referred to other vendors, so that actions taken by customers served by the HPC

can be attributed to the joint marketing campaign. HPCs should also create a protocol to capture customer permission to share information about their requests for services and the results of those services with the Town. Town staff may follow up directly with customers to capture their satisfaction with services and/or identify and remove barriers to accessing service.

**IV. PROJECT SCHEDULE**

The Town anticipates a partnership start date after the signing of a memorandum of understanding in spring 2023. The performance period of the partnership is one year beginning once the contract is signed, with potential to extend the partnership for an additional year as agreed upon by the Town and the HPC, based on campaign progress, staff capacity, and ongoing community need. Proposals should include a project schedule based upon the above tasks demonstrating ability and capacity to meet the retrofit goals.

**V. DELIVERABLES**

The consultant shall provide the following deliverables to the Town:

- Educational outreach materials (fliers, brochures, mailers, PowerPoint presentations, etc.) developed in collaboration with the Town and co-branded with the Electrify Arlington campaign
- Monthly reporting to the Town of data items listed below in Section VII, Submittal Requirements.

All materials will become the property of the Town of Arlington.

**VI. SELECTION CRITERIA**

The Town will award the contract to the HPC offering the most advantageous response to this RFP, taking into consideration all evaluation criteria. The selection process will include an evaluation procedure based on the criteria identified below. The City reserves the right to conduct interviews of any or all of the HPCs that submit a proposal. The Proposers shall be ranked in accordance with the following selection criteria and associated weight as follows:

Highly Advantageous	Advantageous	Not Advantageous	Not Acceptable
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**1. Understanding of and Capacity to Fulfill the Scope of Services**

Highly Advantageous	The Proposer has demonstrated understanding of and capacity to carry out all the functions in the Scope of Services.
Advantageous	The Proposer has demonstrated understanding of and capacity to carry out almost all the functions in the Scope of Services.
Not Advantageous	The Proposer has demonstrated understanding of and capacity to carry out some of the functions in the Scope of Services.
Not Acceptable	The Proposer has not demonstrated understanding of and capacity to carry out the functions in the Scope of Services.

## 2. Years of Experience

Highly Advantageous	Three (3) years or more of Home Performance Services experience
Advantageous	Two (2) years of Home Performance Services experience
Not Advantageous	One (1) year of Home Performance Services experience
Not Acceptable	No experience of Home Performance Services

## 3. Outreach to Target Populations

Highly Advantageous	The Proposer has demonstrated the use of outreach methods that successfully engage all of the Town's target populations outlined in the scope of work and result in delivery of services to those populations.
Advantageous	The Proposer has demonstrated the use of outreach methods that successfully engage most of the Town's target populations outlined in the scope of work and result in delivery of services to those populations.
Not Advantageous	The Proposer has demonstrated the use of outreach methods that successfully engage residents but not specifically the Town's target populations outlined in the scope of work and do not result in delivery of services to those populations.
Not Acceptable	The Proposer has not demonstrated the use of outreach methods that successfully engage all of the Town's target populations outlined in the scope of work and result in delivery of services.

## 4. References

Highly Advantageous	The Proposer has only favorable references on similar projects.
Advantageous	The Proposer has more favorable than unfavorable references on similar projects.
Not Advantageous	The Proposer has fewer favorable than unfavorable references on similar projects.
Not Acceptable	The Proposer has no favorable references on similar projects.

## 5. Meeting the Town's Goals for Delivery of Services

Highly Advantageous	The Proposer has quantitatively demonstrated the capacity to exceed the Town's goal of 200 combined energy efficiency services provided annually.
Advantageous	The Proposer has quantitatively demonstrated the capacity to meet the Town's goal of 200 combined energy efficiency services provided annually.
Not Advantageous	The Proposer has quantitatively demonstrated the capacity to meet some of the Town's goal of 200 combined energy efficiency services provided annually.
Not Acceptable	The Proposer has not quantitatively demonstrated the capacity to meet the Town's goal of 200 combined energy efficiency services provided annually.

## VII. SUBMITTAL REQUIREMENTS

Interested qualified HPCs must submit 3 copies of their proposal, plus one electronic copy on a thumb drive, all sealed in a single envelope marked “**RFP 23-32 Home Performance Contractor Services**” addressing the objectives, scope and schedule described in this RFP. The Town of Arlington asks that interested HPCs answer the following questions to address the above scope of work:

### **Task 1 Marketing and Outreach:**

Please describe in detail the co-branded marketing and outreach efforts you’d propose in order to surpass the Town’s annual goal of 80 weatherization (Wx) installations, 100 HVAC upgrades, and 20 small business assessments (via referrals). In your response, please describe:

- 1.1 Approximately how many completed home energy assessments (HEAs) would be necessary to reach the goals
- 1.2 Your company’s capacity to schedule and deliver this many HEAs annually
- 1.3 The channels and methods you propose using as well as their frequency and volume
- 1.4 How you would leverage the brands and communication channels of the Town of Arlington and the Electrify Arlington campaign in your marketing efforts
- 1.5 How you would make your efforts focused on or at least inclusive of the target populations of the campaign

### **Task 2 Customer Intake and Service Delivery:**

- 2.1 Customer Intake: Please describe your intake process for identifying, serving, or referring the following groups of leads who request your services in the field, online, or by calling your call center. Please include details on when in the process you capture customer information and if and how these customers can schedule their own appointments online:
  - 2.1.1 Landlords of 1-4 unit buildings
    - 2.1.1.1 With multiple properties
    - 2.1.1.2 With mixed income tenants
  - 2.1.2 Renters in 1-4 unit buildings
    - 2.1.2.1 Who are willing to coordinate with other tenants and/or their landlord
    - 2.1.2.2 Who do not wish to coordinate with other tenants and/or their landlord
  - 2.1.3 Moderate income households eligible for enhanced weatherization incentives
  - 2.1.4 Income-eligible customers
  - 2.1.5 Customers who live in buildings or associations with more than 4 units
  - 2.1.6 Customers who had program visits within 2 years and/or have completed all eligible weatherization measures but are interested in or qualified for HVAC upgrades of heat pump installations
  - 2.1.7 Please describe how your intake process would coordinate with the Electrify



Arlington coaching service—a free program that matches residents interested in heat pumps with volunteer coaches.

2.2 Customer Service: Please describe your process for making HVAC referrals during HEAs.

- 2.2.1 What criteria do you use to determine if a referral is made?
- 2.2.2 To which company(ies) do you make your referrals?
- 2.2.3 Are customers able or encouraged to set an appointment for an HVAC consultation during the HEA?
- 2.2.4 At approximately what percentage of visits is an HVAC referral made?
- 2.2.5 Are referrals made specifically for heat pumps?
  - 2.2.5.1 If so, approximately what percentage of referrals are made specifically for heat pumps?
- 2.2.6 What, if anything, do you do to ensure your HVAC referrals receive a price that is competitive with the market rate for similar equipment?
- 2.2.7 Approximately what percentage of referrals result in:
  - 2.2.7.1 A completed HVAC consultation?
  - 2.2.7.2 A completed HVAC installation?
  - 2.2.7.3 A completed heat pump consultation?
  - 2.2.7.4 A completed heat pump installation?

2.3 Customer Experience

- 2.3.1 Please share processes you have for collecting customer feedback and provide any relevant metrics you have to demonstrate customer satisfaction.
- 2.3.2 Please provide a copy of your most recent utility contractor quality report. Feel free to provide any comments to explain the grades or improvement plans you may have.

2.4 Town of Arlington Language Needs Matrix:

Please fill out the following table indicating the availability of or your willingness to create each of the listed items. It is assumed that all items are available or can be created in English.

- These resources are currently available (Available)
- You will initiate creation these resources upon being selected (Create Immediately)
- You will create these resources before the end of the first year of the program on December 31, 2023 (Create Eventually)
- You cannot commit to creating these resources (No Commitment)
- You don't use these resources or don't plan to use them in this program (N/A)

Resource	Mandarin	Japanese	Spanish	Portuguese	French	Haitian Creole	Arabic
Field staff (canvassing, tabling, presentations)							
Online-scheduling tool							

Phone scheduling staff							
Pre HEA emails (confirmation, moderate income)							
Virtual energy specialists							
In-home energy specialists							
Post HEA phone staff							
Post HEA emails (Barrier removal, contract follow up, HVAC referrals, Wx scheduling/confirmation)							
Weatherization crew							

**Task 3 Data Sharing:**

3.1 Please see the data matrix below. Data will need to be shared with the Town, or another organization it designates, at least on a monthly basis, but please indicate if you are able to share it more frequently. Indicate below for each data item if you are:

- Willing to share the data
- The data is not collected
- The data is collected but you prefer not to share it
- Other

<b>Data</b>	<b>Description</b>	<b>PLEASE INDICATE IF THIS DATA CAN BE SHARED (Will Share, Not Captured, Prefer Not to Share, Other)</b>	<b>PLEASE ADD ANY NOTES (requests for clarification, other questions, explanation for data sharing answer)</b>
Service Address	Please include unit #		
First Name - Contact Requesting Service	e.g. contact info of spouse, relative, landlord of account holder who contacted vendor		
Last Name - Contact Requesting Service	e.g. contact info of spouse, relative, landlord of account holder who contacted vendor		

Phone Number(s) - Contact Requesting Service	Please include all numbers on file (home, work, cell)		
E-Mail - Contact Requesting Service	Please include all emails on file (home, work)		
First Name - Account Holder	If different from contact requesting service		
Last Name - Account Holder	If different from contact requesting service		
Phone Number(s) - Account Holder	Please include all numbers on file (home, work, cell)		
E-Mail - Account Holder	Please include all emails on file (home, work)		
Preferred Language - Contact Requesting Services			
Preferred Language - Account Holder			
Inquiry Status	<p>Examples:</p> <ul style="list-style-type: none"> <li>- HEA Scheduled</li> <li>- Not yet scheduled - Need Additional Information / Customer Action</li> <li>- Referred to Multi-Family (5+)</li> <li>- Referred to Low-Income</li> <li>- Referred to Small Business</li> <li>- Inactive - Not Interested</li> <li>- Inactive - HEA within 2 years</li> <li>- Inactive - Out of Service Area</li> </ul>		
Date of HEA			

Status of HEA	Please provide a key to translate your statuses to the following statuses - Scheduled in the future - Completed - Canceled		
HEA cancelation reason			
Result of HEA	Please provide a key to translate your statuses to the following four outcomes - No Opportunity - Contract presented, unsigned - Contracts presented, signed - Health and Safety barrier identified		
Health and Safety Barrier Detail	Knob & Tube (Minor) Knob & Tube (Major) Combustion Safety Failure Asbestos Vermiculite Mold/Moisture Dirt Floor Basement Unvented Bath Fan Other		
Is the service address (unit) rented or owned			
Primary heating fuel			
Date of Wx			
Status of Wx	Please provide a key to translate your statuses to the following three statuses - Scheduled in the future - Completed - Canceled		

Wx cancelation reason			
List of instant savings measures			
Value of instant savings measures			
Projected savings from instant savings measures			
Value of insulation and air sealing			
Projected savings from insulation and air sealing			

3.2 Please describe how you will obtain customer permission to share their data with the Town. In addition, please clarify if this will be an opt-in or opt-out process.

**Task 4 Open Response**

- 4.1 Please include any other information you wish about your company’s qualifications to be selected as the vendor for this program
- 4.2 What additional resources or support could the Town provide to you that would make it easier for you to achieve as many of the goals and objectives of the scope of work as possible?

The Town reserves the right to reject any or all proposals, to waive any non-material irregularities or information in any proposal, and to accept or reject any item or combination of items. The Town also reserves the right to seek additional information and revised proposals prior to selection of an HPC through written notice to all of the respondents.

**VIII. REQUIRED FORMS**

All forms included herein must be submitted with the proposal.

- A. Certificate of Non-Collusion
- B. Certificate of Tax Compliance

**CERTIFICATE OF NON-COLLUSION FORM**  
**TOWN OF ARLINGTON**  
**Home Performance Contractor for Services**

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

\_\_\_\_\_  
Signature of Individual Submitting Bid or Proposal

\_\_\_\_\_  
Name of Individual Submitting Bid or Proposal

\_\_\_\_\_  
Name of Business

\_\_\_\_\_  
Date

BY STATE LAW THIS NON-COLLUSION FORM MUST BE SIGNED AND SUBMITTED WITH THE BID OR PROPOSAL.

**CERTIFICATE OF TAX COMPLIANCE FORM**  
**TOWN OF ARLINGTON**  
**Home Performance Contractor for Services**

Pursuant to MGL Chapter 62C, Section 49A, I certify under the penalties of perjury that I have complied with all laws of the Commonwealth of Massachusetts relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

\_\_\_\_\_  
Social Security Number or  
Federal Identification Number

\_\_\_\_\_  
Signature and Title of Individual or  
Responsible Corporate Officer

BY STATE LAW THIS CERTIFICATE OF TAX COMPLIANCE FORM MUST BE SIGNED AND SUBMITTED WITH THE BID OR PROPOSAL.