



RFP for BetterBuildings for Michigan Contractor Training Consultant

PURPOSE

The purpose of this request for proposal (RFP) is to solicit contractor and outreach training services for the BetterBuildings for Michigan program. The goal of this training is to increase uptake in additional energy efficiency upgrades as a percentage of energy assessments.

BetterBuildings for Michigan's residential program is intended to deliver energy efficiency measures to over 11,000 homeowners throughout the state. The program offers incentives and affordable loans for homeowners who choose to invest in energy efficiency measures in select neighborhoods throughout the state of Michigan.

The program uses a wide variety of marketing and outreach mechanisms to reach homeowners including social media, community and neighborhood events, mailed and printed materials, cable TV shows, and canvassing. A homeowner signs up for the program by contacting an outreach specialist, who describes the program and schedules an energy assessment with the contractor. The contractor performs the home energy assessment, provides a basic package of energy efficiency measures (i.e., CFLs, low flow faucets, programmable thermostats, and in some cases air sealing), and prioritizes the list of potential energy efficiency improvements for the homeowner. Contractors identify the costs, available incentives and rebates, and the payback on the improvements, and then work with the homeowner to close the sale.

Since both contractors and outreach specialists play key roles in communicating the benefits of performing energy efficiency work throughout the homeowner interaction process, their ability to position and sell the benefits of deep energy efficiency improvements is critical to the success of the program. To this end, Michigan Saves is issuing this RFP to hire a Consultant to develop or adapt existing training models for BetterBuildings for Michigan's residential contractors and outreach specialists and deliver training in participating communities. The goal of this training is to increase uptake in additional energy efficiency upgrades as a percentage of audits. Training for outreach specialists should focus on how they can prepare the homeowner for the contractor's visit, and how they can work with the contractor and homeowner throughout the process to increase uptake in additional measures. Contractor training should focus on increasing uptake in additional measures as they work with homeowners during and after the energy assessment. RFP responses should include bids for evaluating the impact of the training and reporting on its effectiveness.

BACKGROUND

BetterBuildings for Michigan Program

BetterBuildings for Michigan uses a community approach to deliver energy efficiency improvements for homes and businesses by providing access to incentives and affordable loans. The program is supported by the American Recovery and Reinvestment Act (ARRA) and developed by the Michigan Energy Office; Michigan Saves; the City of Grand Rapids; the Economic Development Corporation of the City of Detroit; and the Southeast Michigan Regional Energy Office.

BetterBuildings for Michigan is helping homeowners and businesses save money, creating a sustainable energy efficiency market and putting people to work. The program will reach over 11,000 homes throughout Michigan and over 130 commercial buildings in the city of Detroit while creating over 2,000 new jobs. Energy efficiency improvements and affordable loans will be delivered in key targeted areas throughout the state.

For additional details on the program, please refer to the BetterBuildings for Michigan website at www.betterbuildingsformichigan.org.

OBJECTIVES

The objectives of the BetterBuildings for Michigan contractor training are to:

- Increase homeowner uptake in deep energy efficiency improvements with general training sessions in fall 2011 (training for outreach specialists and contractors may or may not be performed at the same time in the same class – Consultant may specify preference)
- Focus on effective strategies for increasing participation in Michigan Saves Home Energy Loan program
- Reinforce prior training and offer sweep-specific instruction at BetterBuildings for Michigan sweep training sessions in fall 2011 throughout the state
- Evaluate effectiveness of training
- Report results to program staff and Steering Committee
- Focus on providing effective *advanced* strategies to increase uptake as a percentage of audits
- Create integrated and effective mechanisms for outreach teams and contractors to work together to create homeowner demand

SCOPE OF WORK

Proposals should provide a detailed description, budget, and work plan—including timeline—for carrying out the duties outlined in this section. Provide separate pricing for each task on a per-unit basis. Estimated budget is \$40,000 - \$70,000.

- Identify and assemble a project team to implement the project to achieve stated objectives (above). This includes organizational team members as well as all relevant project partners.

- Create a project plan outlining general contractual services and any additional contractual services that may be required for project completion.
- Conduct six or more general training sessions in multiple locations throughout the state over 18 days to be completed by September 30, 2011. Assume a total of approximately 100 contractors/outreach specialists.
- Include all facilities costs, travel expenses for trainers, training materials, supplies, participant lunches, and break refreshments.
- Conduct nine sweep kickoff trainings to reinforce initial training and apply sweep-specific guidelines and/or techniques and tools by October 31, 2011. Facilities costs and break refreshments will not be required for these sessions. Other costs such as travel expenses for trainers, training materials, and supplies should be budgeted.
- Disseminate preliminary outcomes to stakeholders after formal training is completed by October 31, 2011.
- Evaluate the effectiveness of the training in terms of education impact.
- Complete and submit final report to BBFM Steering Committee and close out grant agreement by December 1, 2011.

CONFIDENTIALITY

The Consultant and its staff may have access to sensitive information regarding customers and authorized contractors. The Consultant—both the organization and individual staff members—must sign a non-disclosure agreement and the organization must demonstrate to Michigan Saves that it has procedures in place to prevent the inappropriate or illicit use or sharing of this information by the Consultant or its staff.

PERIOD OF PERFORMANCE

The contract for services will be issued through December 31, 2011, with a one-year option to renew, if Michigan Saves determines that extension of the contract is warranted and would benefit the program.

CRITERIA FOR SELECTION

Michigan Saves will contract with one or more Consultants to provide the services outlined in this RFP, as best meets the needs of the organization. We may select multiple entities to perform the scope of work. Preference is given to individual proposals that can meet all the following selection criteria.

1. Consultant outlines a proven, appropriate, and cost-effective approach to the work.
2. Consultant has expertise in or exposure to the technical areas that may be covered by contractors participating in the program, including mechanical, weatherization/building envelope, and/or energy auditing, and has experience working with contractors to improve homeowner participation in energy efficiency improvement programs.
3. Consultant has sufficient staff/capacity, including sufficient trained staff, to conduct training.

4. Consultant has extensive geographic range. Preference will be given to applicants able to cover the entire state of Michigan.
5. Consultant is free from conflicts of interest that may compromise the independence of its service to the Michigan Saves program.
6. Consultant demonstrates the best value to the project—which is not necessarily the lowest cost proposal—as the provider of the contractor training services sought in this RFP.
7. Consultant can demonstrate proven results in comparable programs.

SUBMISSION REQUIREMENTS

- Identify and detail your organization’s approach to successfully completing each of the elements of the scope of work outlined in this RFP. Articulate process and approach used to achieve stated program objectives. Identify aspects of your proposed approach that are unique to your organization.
- Identify your organization’s relevant past work, capacity, and the expertise of proposed staff in a manner responsive to selection criteria outlined above.
- Provide an assurance related to conflict of interest and disclosure of any potential conflict including, but not limited to, any lines of business, subsidiaries/affiliates, or subcontractors/employees performing: (1) energy audits in homes; (2) energy improvement installations in homes (e.g., mechanical contractor, builder, home weatherization contractor); or (3) consulting, training, or other services, including financing and quality assurance, related to categories (1) or (2).
- Identify all subcontractors to be used to implement the elements in the scope of work outlined above. Include the names of key personnel, relevant individual and organizational experience, and assurances related to conflict of interest.
- Provide an estimate of direct costs needed to complete the Scope of Work, to the extent possible, and include a schedule of rates.
- Include any other information that you believe Michigan Saves should consider.

Proposals should provide a straightforward, concise description of your organization’s ability to meet the requirements of the RFP. You may submit the response by sending two hard copies to:

Mary Templeton
Public Sector Consultants Inc.
600 W. Saint Joseph St., Suite, 10
Lansing, MI 49833

or by e-mailing a single copy in Adobe Acrobat format to mtempleton@pscinc.com. E-mail submission is preferred.

The deadline for response is 5:00 PM on Monday, July 18, 2011.

TIMELINE

Proposals received by July 18, 2011.

Contract expected to be awarded by August 1, 2011. Training expected to begin in late August and/or early September 2011.

ADDITIONAL INFORMATION

Michigan Saves reserves the right to reject any or all proposals received as a result of this RFP, and is not liable for any cost incurred by your firm in responding to this opportunity.

For additional information on the program, please consult the website at www.betterbuildingsformichigan.org.