



## REQUEST FOR PARTICIPATION (RFP)

### Manufactured Home Weatherization & HVAC Contractors

#### Manufactured Home Free Services

Energy Trust of Oregon, Inc. ("Energy Trust"), an Oregon non-profit 501(c)(3) corporation, is seeking participation interest from respondents ("Respondents") with skills sealing and repairing ducts in manufactured homes to create a defined roster of qualified contractors for Energy Trust's 2021 Manufactured Home Free Services program. Multiple contractors per region may be approved for participation based on submissions to this RFP.

#### 1. Energy Trust Overview

Energy Trust is an independent nonprofit organization dedicated to energy efficiency and renewable power development. Energy Trust's services, cash incentives, and solutions have helped participating customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas, and Avista save more than \$8.2 billion so far on their energy bills. Since 2002, the organization's leadership has been a contributing factor in the region's low energy costs and in building a sustainable energy future. More information about Energy Trust's background, funding sources, strategic and action plans, policies, and programs are available on our website at [www.energytrust.org/about](http://www.energytrust.org/about).

#### 2. RFP Background

The purpose of this RFP is to solicit participation interest from qualified expert Weatherization and HVAC contractors that are committed to improving comfort and energy savings for manufactured homes residents, creating new opportunity for under-served customers to access Energy Trust programs and ensuring effective improvements and repairs in a housing category with great potential for energy savings. Approved contractors will enter into a participation agreement with Energy Trust and act as a limited network of Energy Trust trade allies to collectively serve eligible Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas, and Avista customers in Oregon.

Respondents will provide free Comprehensive Home Energy Assessments, Duct Testing, Duct Sealing, and Duct Repair, and will receive an incentive from Energy Trust for all work performed for eligible customers after April 1<sup>st</sup> 2021. Incentives available for this program are as follows:

- Home Energy Assessment: \$250

One of the following per site:

- Duct Sealing: \$300
- Duct Sealing + Minor Duct Repair: \$450
- Duct Sealing + Major Duct Repair: \$600

Energy Trust anticipates entering into written agreements with a limited number of Respondents through this RFP process. It is not expected that all Respondents will be approved as Participating

Contractors. A limited number of Participating Contractors are needed to support this offer; therefore, participation interest may be denied if a sufficient number of Participating Contractors are already present in the same region. A limited number of Participating Contractors are needed to support each of Energy Trust's ten regions. (Regional Participating Contractor needs shown below.) Prior to becoming Participating Contractors in this program, selected Respondents must sign a participation agreement.

<b>Region</b>	<b>Counties</b>	<b>Preferred # of TAs</b>
1	Lincoln	Up-to 2
2	Coos	Up-to 2
3	Multnomah Washington Columbia Clackamas Yamhill	Up-to 3
4	Polk Marion	Up-to 2
5	Lane Benton Linn	Up-to 2
6	Jackson Josephine Douglas	Up-to 3
7	Hood River Gilliam Sherman Wasco	Up-to 2
8	Deschutes Crook Jefferson	Up-to 2
9	Klamath Lake	Up-to 2
10	Morrow Umatilla Union Wallowa	Up-to 3

### 3. RFP Schedule

Statements of qualifications are accepted on an ongoing basis through **October 1, 2021**. Respondent submissions will be reviewed, and Respondents will be contacted by Energy Trust within 30 business days of Energy Trust's receipt of a complete submission. Energy Trust may request an interview with Respondents prior to approving Respondents for program participation. Energy Trust reserves the right to terminate participation agreements for participants who do not meet participation requirements described in section 4 below or fail to submit projects.

All RFP submissions, including questions, must be submitted electronically to [communitypartners@energytrust.org](mailto:communitypartners@energytrust.org). Any questions and/or requests for clarification or additional information regarding this RFP should be submitted in writing, via email, and received by **September 17<sup>th</sup> at 5:00pm** to [communitypartners@energytrust.org](mailto:communitypartners@energytrust.org). Inquiries will be answered via email within 2 business days of original receipt date.

### 4. Participating Contractor Requirements

#### A. Company Profile and Service Area

Participating Contractors must meet the following criteria:

- Energy Trust trade allies for the Residential Home Retrofit program in good standing.
- Be willing to serve rural customers in Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas, and Avista service territory.
- PTCS certified staff available to support duct leakage testing.

#### B. Demonstrated Experience

Participating Contractors will have experience with home energy or comprehensive home assessments, performing diagnostic testing on HVAC and duct systems, and sealing and repairing duct work in manufactured homes. All sites must be pre-qualified by Energy Trust of Oregon prior to offering services or conducting a Home Energy Assessment.

#### C. Pricing

Respondents must be willing and able to offer free no-cost duct testing, duct sealing, and duct repair at every project regardless of project size and complexity, relying on available incentives from Energy Trust as financial compensation exclusively.

#### D. Additional Considerations

Additional consideration will go towards Respondents:

- That are minority, women, or veteran-owned businesses
- That have experience providing additional services to manufactured home residences
- That serve rural or historically underserved communities
- With bilingual capabilities

### 5. Description of Work

Participating Contractors will be responsible for abiding by this program's participation requirements, seeking customers and or accepting referred customers by Energy Trust, and sealing and repairing ducts in eligible homes. Energy Trust will promote and market the offer to eligible sites by way of print and digital marketing. Eligible sites interested in the offer will be referred onto participating Contractors based on locality (Zip Code).

Participating Contractors must conduct Home Energy Assessments, perform duct sealing and repair at eligible sites (Table 1). Home Energy Assessments cannot be exclusively provided intentionally.

All sites must be prequalified by Energy Trust as eligible candidates for duct sealing or duct repair prior to conducting a Home Energy Assessment.

Table 1. Eligible Site Requirements

Work Performed	Eligible Site Requirements
Home Energy Assessment	<ul style="list-style-type: none"> <li>• Manufactured home</li> <li>• Currently uses a forced-air furnace or other ducted system as primary heat source</li> <li>• Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas, or Avista customer</li> <li>• Strong indication of needing duct sealing or repair</li> </ul>
Duct Sealing	<ul style="list-style-type: none"> <li>• Manufactured home</li> <li>• Currently uses a forced-air furnace or other ducted system as primary heat source</li> <li>• Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas, or Avista customer</li> <li>• Ducts tested to assure duct sealing is needed per PTCS standards</li> </ul>
Duct Repair	<ul style="list-style-type: none"> <li>• Manufactured home</li> <li>• Currently uses a forced-air furnace or other ducted system as primary heat source</li> <li>• Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas, or Avista customer</li> <li>• Documented signs of required minor or major duct repairs</li> </ul>

Participating Contractors will be responsible for **seeking and receiving exception approval prior to work at any site** that deviates from program participation rules as outlined in their participation agreement. Work performed is subject to Work Quality Verification inspections by Energy Trust staff.

If a Participating Contractor is found to have violated program participation agreements, such as for charging customers for duct sealing or duct repair, they will be required to surrender their incentive and may be removed as a Participating Contractor from this program.

Participating Contractor’s participation in this program may be reconsidered if a disproportionate number of sites are only served through the production of a Home Energy Assessment and no duct sealing or repair work is performed.

## 6. RFP Submission Requirements

Please provide answers to the following prompts that describe your qualifications and abilities to meet the requirements and goals of the program as outlined above.

### A. Company Profile and Service Area

- 1) Provide basic organization information (name, location and the appropriate contact, or contacts, for matters regarding this promotion)
- 2) Please describe the local structure of your organization including number of employees, and other resources. Please include your trade ally status and a description of your participation with Energy Trust. Include any other information about your organization that is relevant to this program.
- 3) Provide information about your office location and preferred range of travel.
- 4) Provide information about how participating in this program will help you serve more manufactured homeowners, or manufactured homeowners better.
- 5) Why are you interested in participating in this program?
- 6) Please indicate if you are bilingual or offer administrative bilingual services.

7) Please indicate if you are a minority, woman, or veteran-owned business.

## **B. Demonstrated Experience**

Describe your organization and its ability to meet the Participating Contractor requirements specified in **Section 4**. Specifically:

### **1) Site Selection:**

- a. Roughly what percentage of your annual work is conducted in manufactured homes?
- b. What factors show us that you are experienced servicing duct systems in manufactured homes?
- c. Are you or do you employ a PTCS certified staff for all sites which require duct testing?

## **7. Governing Provisions**

All Respondents are subject to the following governing provisions:

### *A) Agreement to All Terms*

By submitting a response to this RFP, the Respondent represents that it is authorized to submit a response, all information provided in the response is true and correct, and the Respondent explicitly agrees and accepts the following provisions of this RFP and all other terms and conditions set forth in this RFP.

### *B) Right to Accept or Reject*

This RFP is not an agreement to purchase goods or services. Energy Trust is not bound to enter into a contract to purchase goods or services with any Respondent. Energy Trust reserves the right to modify the terms of this RFP at any time in its sole discretion. This includes the right to cancel this RFP at any time. Further, Energy Trust reserves the right to waive any nonconformity in submissions received, to accept or reject any or all of the items in the submission and award any ultimate contract in whole or in part as it is deemed in Energy Trust's best interest.

### *C) Ownership of Responses*

All materials submitted in response to this RFP shall become the property of Energy Trust and shall not be returned to the Respondent.

### *D) Confidentiality*

Respondents shall clearly identify those portions for their responses that they do not want revealed to third parties and label such portions as "Confidential Information." Except as required under law or for regulatory purposes, Energy Trust will maintain confidentiality of such information.

### *E) Respondent Expenses and Waiver of Claims*

Respondents are solely responsible for their own expenses in preparing a response and for any subsequent negotiations. Energy Trust will not be liable to any Respondent for any claims, whether for costs or damages incurred by the Respondent in preparing the response, loss of anticipated profit in connection with any final contract or any other matter whatsoever.