



Request for Weatherization Measure Pricing Quotations for Single Family and Attached Low Rise (ALR) Homes

**Associated with the Mass Save Residential
Coordinated Delivery Program as
Administered by National Grid and
Eversource**

RFQ Issued: May 22nd, 2023

Revised 5/19/23

Quotations Due: June 16th, 2023, 5:00 p.m.

Table of Contents

1. Introduction
 - i. Key Dates
 - ii. About The Mass Save Program
2. About this Request for Quotations (RFQ)
 - i. Basic Requirements and Obligations for Proposing Respondents
3. Quotation Outline and Instructions
 - ii. Quotation Format
 - iii. Scoring Criteria
4. Quotation Submittal Process
 - iv. Schedule
 - v. Questions and Requests for Additional Information
 - vi. Quotation Submittal and Method of Delivery
 - vii. Withdrawal and Modification of Quotations or RFQ
 - viii. Notification for Clarification
5. Governing Provisions

Attachments

Attachment 1: Representations and Signatures Page

Attachment 2a: IIC Measure Cost Submission Template

Attachment 2b: HPC Measure Cost Submission Template

Attachment 3: Merit Based Work Allocation System (MBWAS)

Attachment 4: Mass Save Standard for Materials, Installation, and Conduct for Energy Efficiency Measure Installation Contractors

Attachment 5: Independent Insulation Contractor's (IIC's) Scoring Methodology

Attachment 6: Home Performance Contractor's (HPC's) Scoring Methodology

Attachment 7: Unit Pricing Calculator/Example

1. Introduction

The Mass Save Residential Coordinated Delivery Program as Administered by National Grid and Eversource and associated Lead Vendors, henceforth known as “Requestor”, are seeking responses through this Request for Quotations (“RFQ”) for qualified Residential Weatherization contractors, henceforth known as “Respondent”, to submit weatherization measure pricing with the intent of installation in qualified, existing homes. The Requestor will continue to provide program incentives to enable a participating network of Trade Allies to offer customer participants the highest quality work at a cost-effective price for these upgrades.

Per the Green Communities act, the Requestor shall ensure that programs administered by them are delivered in a cost-effective manner capturing all available efficiency opportunities, minimizing administrative costs to the fullest extent practicable and fully utilizing competitive procurement processes.

In working towards this cause, the Requestor has moved to a competitive bidding structure, biennially (once every two years), or as the Requestor sees fit. Respondents joining the Single Family and Attached Low Rise Program as Administered by National Grid and Eversource off bid cycle will be subject to established bid pricing until the next bidding RFQ. The Requestor expects to finalize pricing during Q3 2023.

Key Dates

Questions and requests for clarification due: June 2nd, 2023, 5:00 p.m.

Quotation submission deadline: June 16th, 2023, 5:00 p.m.

See Schedule (Section 4) for additional information.

About The Mass Save Single Family and Attached Low Rise Program

Your local electric and natural gas utilities and energy efficiency service provider are taking strides in energy efficiency: Berkshire Gas, Cape Light Compact, Eversource, Liberty Utilities, National Grid and Unitil. As one, we form Mass Save®, with the common goal of helping residents and businesses across Massachusetts save money and energy, leading our state to a clean and energy efficient future. These programs and services are managed and delivered by electric and gas Sponsors (working closely with the Massachusetts Department of Energy Resources), to provide the expertise to help you save energy and money. The funding is supported by a charge on customers’ energy bills. Through the joint efforts of the Mass Save collaborative, Massachusetts is one of the most energy efficient states in the country, according to the American Council for an Energy-Efficient Economy (ACEEE).

Mass Save® works with a network of certified experts that are trained to serve customers through our Residential Coordinated Delivery Program. All participating experts must meet training and certification requirements to be eligible to work within the Residential Coordinated Delivery (“RCD”) initiative (formerly called Home Energy Services “HES” Program). The Sponsors of Mass Save offer standardized pricing for program-approved weatherization improvements for customer convenience. All participating Respondents will offer the same pricing for insulation and air sealing.

2. About this Request for Quotations (RFQ)

The offer will help serve the following goals: improve comfort and energy savings for renters and homeowner residents, increase business and workforce opportunities for participating organizations, and expand programs to low/moderate households. Selected Respondents will act as a network of Trade Allies to collectively serve Eversource and National Grid in Massachusetts.

Participating Respondents will commit to a price structure that allows customers to pay affordable, fixed out-of-pocket costs for weatherization paired with a flat incentive sponsored by Eversource and National Grid

- The Requestor has established comprehensive installation guidelines for weatherization and air sealing in residential homes to facilitate the installation of appropriate materials. (**Attachment 4**)
- Vendors have provided descriptions and instructions of what is expected for any individual measure, if necessary, on the Bidding Template. (**Attachment 2**).
- Responses by Independent Insulation Contractors (IICs) to this RFQ will inform IIC Respondent's "Overall Contractor Grade". For details on grade calculation see **Attachment 5**. Overall Contractor Grade may affect the following:
 - Overall Contractor Grade may affect which Respondents can participate in the Merit Based Work Allocation System.
 - Overall Contractor Grade may affect the amount of work acquired through the Merit Based Work Allocation System. Please review **Attachment 3** for information on the Merit Based Work Allocation System.
 - Overall Contractor Grade may affect potential performance bonuses as paid out by individual Requestors.
- Responses by Home Performance Contractors (HPCs) to this RFQ will inform HPC Respondent's placement in the Customer Acquisition Recovery Fee system. For details on placement calculation see **Attachment 6**.

Interested Respondents are invited to respond to the RFQ as specified below. The Requestor encourages Respondents to leverage their experience for more efficient work practices, negotiate bulk pricing with suppliers, or any other cost efficiency actions that can bring the most competitive price to this bid process.

In responding to this RFQ, among other things, Respondents are not required to offer all weatherization items, but additional work may be available to those who do, in accordance with the RFQ guideline below. Contractors are encouraged to provide their lowest reasonable pricing for all measures.

Basic Requirements and Obligations for Quoting Respondents

To have your quotation considered:

- Respondents must be an active Mass Save participating contractor at the time of their bid submission.
- Selected Respondents must agree to follow the material and installation specifications as outlined in **Attachment 4**.
- Respondents must successfully complete and submit **Attachment 1 and Attachment 2** according to the instructions in *Section 3* of this Request for Quotations.

3. Quotation Outline and Instructions

Respondents may review the attachments provided with this RFQ and/or listed on the online portal, to submit your bid. Submissions that fail to include the following documents may not be considered:

- Representations and Signatures Page (**Attachment 1**)
- Measure Cost Submission Template (in Excel format) (**Attachment 2**)
- The Requestor has provided a bidding template of all eligible program weatherization measures. (**Attachment 2**)
 - Respondents are to provide their best price for each measure by indicated unit in the column marked “New Cost Per Unit” or provide a percentage increase/decrease in column marked “Percentage Change” relative to the existing unit cost from column marked “Current Unit Cost”.
 - Column marked “Current Unit Cost” INCLUDES the 8.6% adder fee.
 - Permit fees should not be included in unit pricing calculations.
 - As a participating contractor, Respondents are required to install all measures that they bid on.
 - If a Respondent does not offer a value in the “New Cost Per” column nor the “Percentage Change” column, for a nonrequired measure, they will input “X” in the “No Bid” column, and their bid will not be considered for that specific measure.
 - All measures are required to be bid on unless the measure’s category is marked “Optional on the Bidding Template (**Attachment 2**)”.
 - A minimum of 25% of all respondents are needed to bid on each measure line item to establish a price, otherwise the Requestor reserves the right to establish a price.
 - Column marked “Validation” notifies Respondent of a potential outlying or incorrect bid on a measure-by-measure basis.
 - Bids marked with a warning will be accepted.
 - Bids marked with an error will NOT be accepted.
 - Upon request, Respondents may be asked to provide itemization backup for their quotation. (See **Attachment 7** for example)

Establishing Accepted Bids

The Requestor reserves the right to accept or reject any or all of the bids.

At the measure level, any bid submission found outside of two standard deviations of the mean will be removed from the price setting calculation, per measure.

Price Setting Criteria

Once the Requestor has established the set of acceptable bids, as described above, all bid submissions, per individual measure, will be averaged (by taking the mean) to set that measure's price.

The Requestor reserves the right to accept or reject any or all of the bids and set measure prices as they see fit.

All Respondents will be notified of the outcome of the RFQ.

4. Quotation Submittal Process

Schedule

Posting Request for Quotations	Monday, May 22 nd , 2023
Respondent Informational Call #1	Friday, May 26 th , 2023, 10:00 AM
Deadline to submit written questions and requests for information	Friday, June 2 nd , 2023, 5:00 PM
Respondent Informational call #2 / Presentation to Bidders of Written Questions/Answers	Friday, June 9 th , 2023, 10:00 AM
Final respondent Q/A call	Thursday, June 15 th , 2023, 10:00 AM
Quotation Submission Deadline	Friday, June 16 th , 2023, 5:00 PM
Notification of Results to Respondents	Wednesday, July 5 th , 2023
New Pricing Launch	Monday, July 10 th , 2023

All times are displayed in Eastern Standard Time.

Questions and Requests for Additional Information

Any questions and/or requests for clarification or additional information regarding this RFQ should be submitted in writing, via email and received by Friday, June 2nd, 2023, 5:00 PM to PricingRFPIInfo@CLEARresult.com or through the email link in the RFQ submission portal, found at <https://www.wxpricebidding.com>. Emails should be clearly labeled with the subject line "Request for Clarification-Measure Cost Bidding RFQ". Requestor staff or Lead Vendor staff are not available for verbal conversations with individual bidders.

Quotation Submittal and Method of Delivery

All quotations should be clear, complete, and concise. **Emailed, faxed, or mailed quotations will not be accepted.** The Requestor will only accept quotations by use of the online portal found at <https://www.wxpricebidding.com> and are to be submitted no later than Friday, June 16th, 2023, 5:00 PM. The Requestor will not be obligated to consider information received after this deadline.

If a Respondent would like to submit their bid using a method outside of the online portal, please email for further discussion. The Requestor agrees to consider submitted quotations equally and without favorability regardless of approved submission method, as discussed by both Requestor and Respondent.

Withdrawal and Modification of Quotations

Respondents may withdraw their quotation and submit a revised quotation prior to the response deadline. After the response deadline, Respondent-initiated changes will not be accepted unless Requestor, in its sole discretion, determines otherwise. Respondents may withdraw their quotation from consideration at any time by emailing PricingRFPIInfo@CLEAResult.com labeled with a subject line "Withdrawal or Modification-Measure Cost Bidding RFQ".

Any material submitted by a Respondent will become the property of the Requestor. The Requestor may amend the RFQ at any time prior to the quotation due date by issuance of a written amendment to all Respondents participating in the process. The Requestor may also cancel, delay, or suspend this solicitation if in the best interest of the program. The Requestor may reject any or all quotations, in whole or in part, if in the best interest of the program as determined by the Requestor.

Notification for Clarification

During the evaluation process, The Requestor may request any clarification needed to understand the proposing Respondent's approach and/or request a resubmittal of submission.

5. Governing Provisions

All submitted quotations are subject to the following governing provisions:

1. Agreement to All Terms

By submitting a response to this RFQ, 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 RFQ and all other terms and conditions set forth in this RFQ.

2. Right to Accept or Reject

This RFQ is not an agreement to purchase goods or services. The Requestor is not bound to enter into a contract to purchase goods or services with any Respondent. The Requestor

reserves the right to modify the terms of this RFQ at any time in its sole discretion. This includes the right to cancel this RFQ at any time.

Further, the Requestor reserves the right to waive any nonconformity in submissions received, to accept or reject any or all of the items in any submission and set measure prices as they see fit in whole or in part as it is deemed in the Requestor's best interest.

3. Prevention of Collusion, Fraud, or Intent to Deceive

Bid-rigging or otherwise undermining a competitive process is a violation of the Massachusetts consumer protection act, (M.G.L. c. 93A.) and violators could be subject to legal action.

If it is found that any Respondent or group of Respondents is colluding to influence others, defraud, or artificially inflate quotation pricing, the Requestor can exercise their rights to reject those bids or all bids and require resubmittal, or set the price on their own.

Those who are found to have colluded may be barred from participation in the Mass Save Programs sponsored by the Requestors.

Respondents have a responsibility to report any knowledge of attempts to collude to influence others, defraud, or artificially inflate quotation pricing. Failure to do so may result in also being barred from participation in the Mass Save Programs sponsored by the Requestors.

4. Ownership of Responses

All materials submitted in response to this RFQ shall become the property of the Requestor and shall not be returned to the Respondent.

5. Confidentiality

The Requestor shall maintain confidentiality of all information unless Respondent clearly identifies those portions of their responses that they agree to have revealed to third parties and label such portions as such, except as required under law or for regulatory purposes.

6. Respondent Expenses and Waiver of Claims

Respondents are solely responsible for their own expenses in preparing a response and for any subsequent negotiations. The Requestor 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 pricing or any other matter whatsoever. Respondent waives any right it might have to bring a claim against The Requestor, its Board of Directors, employees, contractors, or agents with respect to any matter arising out of the RFQ.