



REQUEST FOR PROPOSALS

TECHNICAL ASSISTANCE WITH VERIFICATION OF VERMONT GAS SYSTEMS ANNUAL SAVINGS CLAIMS

DATE ISSUED: JANUARY 7TH, 2025

QUESTIONS DUE: JANUARY 17TH, 2025

NOTICE OF INTENT TO BID DUE: JANUARY 27TH, 2025

PROPOSALS DUE: FEBRUARY 7TH, 2025

INTRODUCTION

The Vermont Department of Public Service (“Department” or “PSD”) is an agency within the executive branch of Vermont state government charged with representing the public interest in matters regarding energy, telecommunications, water and wastewater. The PSD is also responsible for evaluating energy efficiency programs implemented by Vermont’s Energy Efficiency Utilities (“EEUs”), including Vermont Gas Systems (“VGS”). The purpose of this Request for Proposals is to select a Contractor, or team of Contractors, to assist in the verification of annual savings claims for VGS’s Programs for program years 2024, 2025 and 2026.

Potential contractors must have extensive experience and demonstrated abilities in all aspects of thermal energy efficiency evaluation techniques, strategies, and principles, including data analysis; statistical sampling design, variance, and bias; energy efficiency measure characterization; and report writing. **The not to exceed budget for this three-year project is \$240,000.** The source of the funding for this energy savings verification is Energy Efficiency Charge monies.

Proposals are due by **4:30 PM February 7th, 2025**. The contract will be executed as soon as practicable following the award.

Questions about the RFP should be submitted via e-mail by January 17, 2025.

All notifications, releases, responses to questions, and addendums associated with this RFP will be posted on the [Vermont Business Registry](#) and the PSD website under the [Request for Proposals section](#). The PSD will make no attempt to contact interested parties with updated information. It is the responsibility of each bidder to periodically check the above webpages for any and all notifications, releases and addendums associated with this RFP. Responses to questions will be posted on or before January 22, 2025.

Intent to submit a proposal is due January 27, 2025.

Responses to this RFP should be sent in electronic format only. Any questions, notifications of intent to bid, and proposals should arrive before the deadlines and be addressed to:

Keith Levenson

Email: keith.levenson@vermont.gov

Date of Issue of the RFP	1/7/2025
Last Day for Submitting Questions	1/17/2025
PSD Response to Vendor Questions	1/22/2025
Notification of Intent to Bid	1/27/25
Proposal Due Date	2/7/2025

OVERVIEW

The Vermont Department of Public Service (“PSD”) is seeking a Contractor or team of Contractors experienced in energy efficiency program verification and evaluation to provide expert technical assistance in the verification of Vermont Gas Systems’ energy efficiency program annual savings claims and progress toward quantitative performance indicator (“QPI”) targets for program years 2024, 2025 and 2026.

The annual savings verification is conducted for purposes of assessing whether EEU has met performance targets set by the Public Utility Commission (“PUC”). VGS, which was appointed as an EEU in April 2015, is required to meet several QPIs and minimum performance requirements (“MPRs”) for the 2024 to 2026 performance period as described in the PUC order of September 26, 2023. The selected contractor will be asked to assist with statistical sampling of the portfolio on a program and project level, and technical assistance in evaluating the savings claims for complex and custom projects, primarily in VGS’s Commercial and Industrial Programs. The goal of this evaluation is to determine realization rates on a program, sector and portfolio level as well as VGS’s progress toward energy QPIs #1, #2 and #3: annual incremental natural gas savings, lifetime natural gas savings and peak day natural gas savings, respectively.

SCOPE OF WORK

The selected contractor will provide technical assistance to the PSD in verifying VGS’ annual savings claim with respect to annual and lifetime energy savings, peak day demand savings, and Total Resource Benefits¹ for program years 2024, 2025 and 2026. Although this contract is focused on the impact evaluation of VGS programs, the Contractor is encouraged to recommend process improvements to streamline program implementation and savings verification efforts. Further information, including the previously completed 2023 Savings Verification report can be found at: http://publicservice.vermont.gov/energy_efficiency/eeu_evaluation.

Prospective bidders should understand that all aspects of the following work scope require significant coordination with VGS and reliance on documentation and other materials provided by the EEU.

The scope of work shall include the following tasks:

- Task 1 - Kickoff meeting and revised work plan
- Task 2 - Tracking data review and analysis
- Task 3 - Sampling plan
- Task 4 – Engineering analysis and verification
- Task 5 – Measure characterization and technical assistance
- Task 6 – Project databases and reporting
- Task 7 – Project management

¹ Total Resource Benefits (TRB) includes gross natural gas benefits, electric savings, and water savings.

TASK 1: KICK-OFF MEETING AND REVISED WORK PLAN

The selected Contractor will meet with PSD staff, VGS staff and any other stakeholders as determined by the PSD to ensure there is a common understanding of the project's needs and the proposed work efforts and products. Prior to this meeting, the contractor(s) need to familiarize themselves with the operation of VGS. Contractor(s) should come to this meeting prepared to identify the level of VGS and other assistance needed to effectively carry out the evaluation, and the timelines associated with this assistance. The Kickoff meeting should occur within two weeks from the full execution of the evaluation contract. It is strongly encouraged that the Contractor's project manager attend this meeting in person, although practical considerations may make that imprudent. The Contractor shall conduct a similar kick-off meeting for the program year (PY) 2025 verification in early 2026 and for the PY 2026 verification in early 2027. The second and third kick-off meetings need not be in person, although that is encouraged.

Following each kickoff meeting, a revised work plan documenting the common understandings between the contractor, VGS and the PSD should be submitted to the PSD. This plan should represent the detailed schedule for completion of interim products (e.g. sampling plans, draft analysis plans, etc.) and final report products (e.g., final project databases and the draft and final reports). The revised work plan should be provided to the PSD within one week following the kick-off meeting.

TASK 2: TRACKING DATA REVIEW AND ANALYSIS

Immediately after each kickoff meeting (or earlier if possible), the Contractor shall coordinate with the PSD and VGS to obtain the full project tracking database for the previous calendar year. The Contractor is responsible for reviewing the tracking system for accuracy and comprehensiveness in cooperation with PSD and VGS staff. Although not required under this scope of work, the Contractor is encouraged to identify potential improvements to the tracking system to streamline future evaluations and simplify program and portfolio management.

TASK 3: SAMPLING PLAN

For each program year and each program in the VGS portfolio, the Contractor shall develop a sampling plan designed to achieve 80% /10% Confidence/Precision for program-level Mcf savings. (For programs with a small number of projects, such as Residential New Construction, the Contractor may propose a census in lieu of a sampling plan.) These sampling plans shall be presented to the Department with supporting documentation for approval before proceeding to Task 4. In their proposals, respondents should provide an estimated range of sample sizes based on previous years' evaluations that would be covered by their budget while achieving the target 80% /10% confidence / precision at the program level.

TASK 4: ENGINEERING ANALYSIS AND VERIFICATION

Based on the approved sampling plan from Task 3, the Contractor will select and obtain a representative sample of project records from VGS. As requested by the PSD, the Contractor shall perform an engineering desk review and verification of certain project files for appropriateness of engineering assumptions and accuracy of energy and peak day savings

calculations. Specifically, the Contractor will be asked to review more complex custom projects in the evaluation sample, primarily in the three Commercial and Industrial sector programs: Commercial Equipment Replacement (CER), Commercial Retrofit (CSR) and Commercial New Construction (CNC). The Contractor should budget for approximately 25 C&I project reviews and 10 Residential project reviews per year. The C&I projects will be spread roughly equally among the three C&I programs: Commercial Equipment Replacement (CER), Commercial Retrofit (CSR) and Commercial New Construction (CNC). The Residential projects will be sampled mostly from the Custom Residential New Construction (RNC) program, although there may also be projects sampled from the Custom Residential Retrofit (RIR) program. The Contractor may also be asked for technical assistance with the evaluation of savings claims for less common systems or technologies throughout the VGS portfolio. The primary goal of this savings verification is to establish a realization rate at the program level as well as the sector level. The Contractor will also be asked to assist in the roll-up of project-level verification into program and sector level realization rates and VGS' progress toward the annual and 3-year quantitative performance indicators (QPI) established in the PUC's 9/26/23 Order.

TASK 5: MEASURE CHARACTERIZATION AND TECHNICAL ASSISTANCE

At the direction of the PSD, the Contractor will provide measure characterizations for any common or generic measures that are not currently characterized the Natural Gas Technical Resource Manual (TRM), including any documentation of baseline, duty cycle, and loadshape assumptions as well as energy and capacity savings algorithms to add to the TRM. Proposals should include an estimate of time and budget for three TRM measure characterizations of moderate complexity, one per year. The measure characterizations described above shall be delivered to the PSD in a format similar to the existing TRM (see Attachment for examples) and including active hyperlinks to references and documentation where possible. Each measure chapter should include the following elements:

- Description of the efficient measure and the baseline condition
- Savings algorithms for natural gas annual usage, peak day natural gas usage, and for TRB calculations, water savings, and electric savings
- Operating hours and loadshape
- Proposed spillover and freeridership factors where applicable
- Measure lifetime
- Measure incremental and full cost estimates
- Incremental Operation and Maintenance (O&M) costs
- Incentive formulae

TASK 6: PROJECT DATABASES AND REPORTING

All project data and documentation collected in this project shall be entered into an electronic database(s) and provided to PSD to support additional analysis by PSD staff and to support future evaluations. Data shall be submitted to the PSD in a mutually acceptable, commonly usable electronic format, along with a documented data dictionary describing the database contents. Proposals should discuss the suggested database to be used and the data quality procedures planned.

The Contractor shall provide documentation of findings and recommendations at the completion of work plan Tasks 1, 3, and 4. The Contractor shall also deliver draft and final site reports for each project analyzed that thoroughly document and explain the evaluation and analysis methods, findings and recommendations resulting from the analysis. The Contractor shall also prepare a brief final report summarizing the sampling plan, analysis methodology, evaluation activities, program level realization rates as well as key impact and process findings with recommendations on how to address those findings when appropriate. The Contractor should be prepared to meet with VGS and the Department after the verification is complete to present the key findings and help implement those key process recommendations.

TASK 7: PROJECT MANAGEMENT

The Contractor shall assign one project manager that will be the lead in terms of communication with the PSD. Management responsibilities include bi-weekly project updates with the PSD project manager, in which the Contractor will provide a project progress review and address technical questions regarding project review and verification. In addition, the Contractor shall conduct regular check-in meetings with the PSD and VGS staff during the evaluation to review the analysis and verification progress, to allow VGS to review and provide feedback on the results, and at the conclusion of the evaluation to review the key process recommendations and help implement recommended changes. These activities shall take place during the period from approximately March through to mid-July 2025, then again during the same time period in 2026 and 2027.

The Contractor should also propose, and budget for, meetings with VGS and the Department after each of the 2024, 2025 and 2026 Evaluations to review the key process recommendations and help implement recommended changes.

PROJECT TIMELINE

Respondents should propose a detailed timeline for completing the project. The project timeline should start with a kick-off meeting, end with final deliverables and include interim milestones approximating the schedule in the table below.

Key Deliverable Tasks	Draft/Final Deliverable Due Dates ¹		
	PY 2024 Verification	PY 2025 Verification	PY 2026 Verification
Task 1 - Kickoff Meeting	Within two weeks of contract execution	Early March, 2026	Early March, 2027
Task 1 – Revised Work Plan	Ten business days following kickoff meeting	Ten business days following kickoff meeting	Ten business days following kickoff meeting
Task 2 - Tracking data review and analysis	April 4, 2025	April 3, 2026	April 2, 2027
Task 3 – Sampling Plan	March 28, 2025	March 27, 2026	March 26, 2027
Task 4 - Engineering Analysis and Verification	June 13, 2025	June 12, 2026	June 11, 2027
Task 5 – TRM Measure Characterizations	By agreement	By agreement	By agreement

Task 6 – Project databases	June 27, 2025	June 26, 2026	June 25, 2027
Task 6 – Draft savings verification report	July 2, 2025	July 2, 2026	July 2, 2027
Task 6 – Final savings verification report	July 29, 2025	July 29, 2026	July 28, 2027

¹ The above deliverable dates are subject to revision depending upon the needs of the contract with the written concurrence of the Public Service Department.

BUDGET

Respondents should clearly outline budgets for each of the Task components of this evaluation for each year and for the total project, including project management, travel and reporting costs. Hourly rates should be clearly identified and should remain the same for the duration of the contract. Travel-related costs (mileage, meals, and lodging reimbursement) should be identified, budgeted separately, and then built into hourly billing rates. Should this not be possible or practical, the contractor should provide a reasonable argument as to why this is the case.

At the discretion of the State, a contract resulting from this RFP may provide that the State withhold a percentage of the total amount payable for some or all deliverables. Such retainage will be payable upon satisfactory completion and State acceptance in accordance with the terms and conditions of the contract. The budget for this RFP is not to exceed \$240,000.

PERFORMANCE

Contractor must agree to the following performance measure language:

1. Contractors will hold bi-weekly meetings with the Department to discuss progress.
2. Contractor shall notify the Department in a timely fashion should they anticipate any material impacts to either schedule or budget may occur and present a plan to mitigate those impacts.
3. Extensions to agreed-upon deliverable dates require approval of the Department.
4. Where possible, the contractor shall submit all work in advance of deadlines to allow adequate time for PSD review and production.

If the quality of work described above were to deteriorate in any way, the Department would request that the work be resubmitted immediately at no additional charge. If there were no immediate improvement in the overall quality of work, the contractor would no longer be retained by the Department.

GENERAL REQUIREMENTS

The Contractor hired must meet the following General Requirements:

1. Contractor(s) must have extensive experience and demonstrated abilities in all relevant aspects of energy efficiency evaluation techniques, strategies, and principles, including study design, sample design, data analysis, statistical sampling design to address reliability, variance, and bias, and report writing. Contractors should possess a good knowledge of energy efficiency program design, implementation, monitoring, verification, and evaluation.

2. Contractor(s) must be fully conversant with current energy efficiency information technology systems, DSM tracking systems, and applications.
3. Contractor(s) should not be currently employed by a partner firm in VGS, or by VGS itself, and should agree not to undertake such employment during the term of this contract. This condition may be waived by the PSD if requested.
4. Contractor(s) must be available to begin work immediately after the contract is awarded and commit to work completion as quickly as possible.
5. A lead contractor and lead contact person must be identified in joint proposals.

TERMS AND CONDITIONS

1. Bidders must provide an hourly rate for personnel to be assigned to each task identified in the proposal. While actual hours by task cannot be known with precision in advance, a best estimate should be provided with the proposal. A “not to exceed” budget figure will be established in the Terms and Conditions of the contract with the successful bidder.
2. A Bidder shall be solely responsible for all expenses incurred in the preparation of a response to this RFP and shall be responsible for all expenses associated with any presentations or demonstrations associated with this request and/or any proposals made.
3. Ownership of all work products will vest with the Department.
4. Any work products will be delivered to the Department upon termination of the project.
5. Contractors(s) must agree to enter a confidentiality agreement to protect certain customer specific information from public disclosure, as necessary.
6. The PSD reserves the right to amend or cancel this RFP at any time if the best interest of the State requires such action.
7. The PSD reserves the right to:
 - a. to accept or reject any bids, in whole or in part, with or without cause in the best interest of the State and to obtain clarification or additional information;
 - b. waive technicalities in submissions; (A technicality is a minor deviation from the requirements of an RFP that does not impact the substantive terms of the bid/RFP and can be considered without a material impact on the RFP process, etc. A late bid is NOT considered a technicality.)
 - c. conform the selection process, award and/or proposed contract language, at any time during the procurement, to comply with state or federal statute, regulation, or grant requirements;
 - d. make purchases outside of the awarded Contracts where it is deemed in the best interest of the State.
8. News releases pertaining to this RFP, contract award, or the Project shall NOT be made without prior written approval from the PSD.
9. Selection of the winning bidder will be made based on the sole opinion of the PSD that the proposal submitted will be the most advantageous for the State.

10. The PSD reserves the right to make a selection without further discussion of proposals received. Therefore, it is important that each proposal be submitted in the most complete and accurate manner possible.
11. The PSD reserves the right to cancel any contract resulting from this RFP, for cause, as will be defined in the Terms and Conditions of the final contract.
12. Contractor agrees to the terms and conditions of this RFP, including the “Contract Elements” on pages 14-15, which outline the Standard State Provisions for Contracts and Grants. Any requested deviations from these terms and conditions must be presented in the response to this RFP. The PSD and the State reserve the right to deny any such request.

The PSD assumes no liability in any fashion with respect to this RFP or any matters related thereto. All prospective service providers and their assigns or successors, by their participation in the RFP process, shall indemnify, save and hold the PSD and its employees and agents free and harmless from all suits, causes of action, debts, rights, judgments, claims, demands, accounts, damages, costs, losses and expenses of whatsoever kind in law or equity, known and unknown, foreseen and unforeseen, arising from or out of this RFP and/or any subsequent acts related thereto, including but not limited to the recommendation of a service provider and any action brought by an unsuccessful prospective service provider.

It is imperative that Contractor(s) reveal any connections they or any sub-contractors have to projects included for verification. In general Contractors will not provide analysis for projects on which they are or were involved in developing engineering analysis related to project savings estimates. It is imperative that the contractor(s) reveal any connections they or any subcontractors have that may indicate a conflict of interest. A contractor may not assign or subcontract the performance of a Contract or any portion thereof to any other entity without the prior written approval of the State.

As data handled by the selected Contractor(s) is potentially sensitive in nature, the Contractor will need to sign and abide by a confidentiality agreement.

Bidder Confidentiality and Access to Public Records: All responses and other information disclosed in connection with an RFP become the property of the State and, once the resulting Contract is finalized, may be subject to disclosure under the State’s Public Records Act, [1 V.S.A. § 315](#) et seq. Accordingly, the RFP must instruct the bidder to identify any material included in the response that is considered by the bidder to be proprietary or otherwise exempt from public disclosure in the event of a public records request, pursuant to [1 V.S.A. § 317\(c\)](#). The bidder’s response must include a written explanation for each marked section that would support a reasonable claim of exemption, such as, for example, a description of the proprietary nature of the information and the harm that would occur should the material be disclosed. Additionally, the RFP must instruct the bidder to include a redacted copy of its response. Redactions must be limited so that the reviewer may understand the nature of the information being withheld. It is typically inappropriate to redact entire pages, or to redact the titles/captions of tables and figures. Under no circumstances can the entire response or price information be marked confidential. Should the Agency have concerns about the submitted redactions/explanations or lack thereof, the Agency may invite the bidder to provide sufficient explanation and/or appropriate redaction rights.

DATABASES FROM PROJECT

All information and data collected under this project must be provided to PSD upon request to support additional analysis and comments by staff. Quality control procedures must be applied to ensure that data is organized and submitted in a mutually acceptable, commonly usable electronic format. A transfer of all data shall occur upon termination of the contract. However, any and all data and information must be provided to the Department upon request at any point during the project period.

SELECTION CRITERIA

The PSD will evaluate the bidders' proposals according to the criteria listed below. This list is not necessarily provided in order of relative importance.

1. Responsiveness/thoroughness and practicality of the proposed approach in meeting the research objectives and for completing the tasks described in this RFP
2. Experience of *key personnel* in successfully completing similar research and ability to provide on-time, in-budget results
3. Experience of *the contractor* in successfully completing similar research and ability to provide on-time, in-budget results
4. The proposal presentation with respect to the following representations / discussions:
 - Clear understanding of study requirements
 - Technical expertise to conduct the research.
 - Ability to provide high-quality written analysis and reports
 - Quantity and quality of work relative to specified budget
5. Past performance of the bidder and any proposed subcontractors
6. Quality and completeness of the proposal (in terms of coverage, organization, graphics, grammar, spelling, etc.). The quality of the proposal (along with the sample report) will be considered an indication of the likely appearance of deliverables from the Bidder
7. Price and value

The PSD may follow up with a round of questions to all or some of the applicants based on the information in the proposals. A phone interview may also be scheduled for additional clarification of the information in the proposals and the follow-up responses. The review sheet, provided on the following page, includes scoring elements as well as non-quantitative elements that will be considered when awarding a contract. The proposal with the highest score may not ultimately be awarded the contract.

Proposal Review Sheet

PROPOSER: _____

REVIEWER: _____

Rate proposal on each criterion on the following scale: 1=Fails criterion. 2= Minimally meets criterion. 3=Meets criterion. 4=Somewhat exceeds criterion. 5= Greatly exceeds criterion.

RATING (1-5)	CRITERIA
	1. Experience and demonstrated capabilities in energy efficiency potential studies, study design, data analysis, and presentation.
	2. Experience of <i>key personnel</i> in completing similar projects and ability to provide on-time, on-budget results.
	3. Experience of <i>the Program Manager</i> and the <i>Bidding Firm(s)</i> in successfully completing similar projects and ability to provide on-time, on-budget results.
Score A-C Below	4. The proposal presentation for the following criteria:
	A. Clear understanding of requirements as laid out in the RFP; practicality of the proposed approach in meeting objective.
	B. Technical expertise to complete the project.
	C. Quantity and quality of work relative to specified budget.
	5. Proposed staffing plan of bidder, including staff assignments.
	6. Clarity and reasonableness of work plan, including definition and timeliness of tasks to be performed, quality assurance measures defined, and ability to start quickly.
	7. Timeline is reasonable and meets appropriate deadlines.
	8. Budget line items and amounts are sufficiently described and justified. Administrative costs are reasonable and competitive.
	9. Quality and completeness of the proposal (in terms of coverage, organization, graphics, grammar, spelling, etc.).
	10. Contractors/subs have an office located in Vermont <i>1=Yes 0=No</i>
	11. Price.
Total Score (Max 61 Pts. Possible)	
Other comments / qualitative reactions to proposal including past performance of the bidder on PSD contracts and any proposed sub-contractors.	
Notes on potential conflicts of interest:	

PROPOSAL SUBMISSION INSTRUCTIONS

Questions about the RFP should be submitted in writing to keith.levenson@vermont.gov no later than 4:30 PM on January 17th, 2025. The PSD asks that any firms intending to bid also register their intention at that same email by January 27th, 2025.

All notifications, releases, responses to questions, and addendums associated with this RFP will be posted on the [Vermont Business Registry](#) and the PSD website under the [Request for Proposals section](#). The PSD will make no attempt to contact interested parties with updated information. It is the responsibility of each bidder to periodically check the above webpages for any and all notifications, releases and addendums associated with this RFP. Responses to questions will be posted on or before January 22, 2025.

Proposals are due by **4:30pm on February 7th, 2025** with the goal of selecting a contractor by **February 14th, 2025**. The selected contractor must be available to begin work immediately. **An electronic copy** of the proposal, either signed and scanned, or with an electronic signature, must be delivered via email to:

Keith Levenson, Energy Programs Specialist
Vermont Department of Public Service
keith.levenson@vermont.gov
(802)-828-4072

Proposals may include one or more contractors but should identify a primary lead contractor. The proposal should present a clear understanding of the issues to be addressed and a description of how the bidders proposed approach will accomplish the evaluation goals. The proposal should be structured to provide the following information:

1. Understanding of the research goals and associated issues
2. Overview of the proposed approach
3. Detailed Work Plan and related task descriptions
4. Descriptions of similar projects completed
5. Qualifications of firm(s)
6. Qualification of individuals
7. Management and staff structure
8. References, including a short description of the work performed for such references
9. Timeline
10. Task and total project budget that includes a listing of all staff assigned to the project, including project manager, and their time allocations and billing rates
11. Mandatory Bidder Form / Certificate of Compliance (see page 16 of this RFP)
12. Appendix A: Sample report from the prime contractor
13. Appendix B: Other attachments as may be necessary

Understanding of the research goals and associated issues: This section should discuss the key issues associated with achieving the scope of work. It will allow the PSD to assess the contractor's understanding of the objectives that need to be addressed.

Overview of the proposed approach: This section should present an overview of the contractor's research overall approach/methodology, allowing the PSD to determine whether the proposed methods are appropriate to the objectives.

Detailed Work Plan and related task descriptions: This section should include a detailed work plan with a description of individual tasks/activities, a data management strategy (as necessary), and a staffing plan. This section should be descriptive enough to aid the PSD in understanding how the research will be conducted. This section should describe quality assurance measures that will be implemented to ensure that services will be delivered effectively, efficiently, timely, and competently. This section should also address any specific analytic approaches and related reporting activities.

Descriptions of similar projects conducted: This section provides a brief presentation of similar types of research conducted by the prime contractor and other key research team members. The discussion should allow PSD to assess the experiences of the contractor or the contractor team relative to the goals of this project.

Qualifications of firm(s): This section allows the contractor to present their corporate qualifications in addition to the above descriptions.

Qualification of individuals: The proposal should describe the individuals to be assigned to the tasks and their qualifications, along with the key staff's experience in successfully completing similar projects and the firm's ability to provide timely and in-budget results.

Management and staff structure: The proposals should clearly define the team's management and operational structure. Additionally, address the ability to commit key staff for the project's duration and complete the requested scope of work within the scheduled timeframe.

References: The contractor should provide at least two references for similar work from other clients. The references should include a brief description of the research effort, including the name, address, telephone number, and e-mail address of the client's representative for the referenced project.

ADDITIONAL REQUIREMENTS

BUSINESS REGISTRATION:

To be awarded a contract by the State of Vermont a bidder (except an individual doing business in his/her own name) must be registered with the Vermont Secretary of State's office (<https://sos.vermont.gov/corporations/registration/>) and must obtain a Contractor's Business Account Number issued by the Vermont Department of Taxes (<http://tax.vermont.gov/>).

EXECUTIVE ORDER 05-16: CLIMATE CHANGE CONSIDERATIONS IN STATE PROCUREMENTS:

For bid amounts exceeding \$25,000.00, bidders are requested to complete the Climate Change Considerations in State Procurements Certification, which is included in the Certificate of Compliance for this RFP.

After consideration of all relevant factors, a bidder that demonstrates business practices that promote clean energy and address climate change as identified in the Certification, shall be given favorable consideration in the competitive bidding process. Such favorable consideration shall be consistent with and not supersede any preference given to resident bidders of the State and/or products raised or manufactured in the State, as explained in the Method of Award section. But, such favorable consideration shall not be employed if prohibited by law or other relevant authority or agreement.

WORKER CLASSIFICATION COMPLIANCE REQUIREMENTS:

In accordance with Section 32 of The Vermont Recovery and Reinvestment Act of 2009 (Act No. 54), Bidders must comply with the following provisions and requirements.

1. Self Reporting: For bid amounts exceeding \$250,000.00, Bidder shall complete the appropriate section in the attached Certificate of Compliance for purposes of self-reporting information relating to past violations, convictions, suspensions, and any other information related to past performance relative to coding and classification of workers. The State is requiring information on any violations that occurred in the previous 12 months.
2. Subcontractor Reporting: For bid amounts exceeding \$250,000.00, Bidders are hereby notified that upon award of contract, and prior to contract execution, the State shall be provided with a list of all proposed subcontractors and subcontractors' subcontractors, together with the identity of those subcontractors' workers compensation insurance providers, and additional required or requested information, as applicable, in accordance with Section 32 of The Vermont Recovery and Reinvestment Act of 2009 (Act No. 54). This requirement does not apply to subcontractors providing supplies only and no labor to the overall contract or project. This list MUST be updated and provided to the State as additional subcontractors are hired. A sample form is available online at <http://bgs.vermont.gov/purchasing-contracting/forms>. The subcontractor reporting form is not required to be submitted with the bid response.

CONTRACT ELEMENTS

The selected bidder(s) will be expected to sign a contract with the State. Key elements that will be included in a contract with the selected contractor include the following: period of performance, amendment terms, termination clause, primary contacts, statement of work, payment provision, and standard state provision. Other elements, provisions, and requirements may also be included at the discretion of the state/PSD. See "Standard Contract for Services" at [Form Standard-Contract-Services-SSCERT-10-01-24.doc](#) for these and other key elements to be included in the contract. Below are two attachments that will be included in the contract.

ATTACHMENT B – PAYMENT PROVISIONS

The maximum dollar amount payable under this contract is not intended as any form of a guaranteed amount. The Contractor will be paid for products or services actually delivered or

performed, as specified in Attachment A, up to the maximum allowable amount specified on page 1 of this contract.

1. Prior to commencement of work and release of any payments, Contractor shall submit to the State:
 - a. a certificate of insurance consistent with the requirements set forth in Attachment C, Section 8 (Insurance), and with any additional requirements for insurance as may be set forth elsewhere in this contract; and
 - b. a current IRS Form W-9 (signed within the last six months).
2. Payment terms are **Net 30** days from the date the State receives an error-free invoice with all necessary and complete supporting documentation.
3. Contractor shall submit detailed invoices itemizing all work performed during the invoice period, including the dates of service, rates of pay, hours of work performed, and any other information and/or documentation appropriate and sufficient to substantiate the amount invoiced for payment by the State. All invoices must include the Contract # for this contract.
4. Contractor shall submit invoices to the State in accordance with the schedule set forth in this Attachment B. Unless a more particular schedule is provided herein, invoices shall be submitted not more frequently than monthly.
5. Invoices shall be submitted to the State at the following address: psd.invoice@vermont.gov.
6. The payment schedule for delivered products, or rates for services performed, and any additional reimbursements, are: _____.

ATTACHMENT C: STANDARD STATE PROVISIONS FOR CONTRACTS AND GRANTS

Revised October 1, 2024

“Attachment C: Standard State Provisions for Contracts and Grants” (revision version dated October 1, 2024) constitutes part of this Agreement and is hereby incorporated by reference as if fully set forth herein and shall apply to the purchase of all goods and/or services by the State under this Agreement. A copy of this document is available online at:

<https://bgs.vermont.gov/purchasing-contracting/forms>.

MANDATORY BIDDER FORM / CERTIFICATE OF COMPLIANCE

Date:

For a bid to be considered valid, this form must be completed in its entirety, executed by a duly authorized representative of the bidder, and submitted as part of the response to the proposal.

- A. **NON COLLUSION:** Bidder hereby certifies that the prices quoted have been arrived at without collusion and that no prior information concerning these prices has been received from or given to a competitive company. If there is sufficient evidence to warrant investigation of the bid/contract process by the Office of the Attorney General, bidder understands that this paragraph might be used as a basis for litigation.

- B. **CONTRACT TERMS:** Bidder hereby acknowledges that is has read, understands and agrees to the terms of this RFP, including Attachment C: Standard State Contract Provisions, and any other contract attachments included with this RFP.

- C. **WORKER CLASSIFICATION COMPLIANCE REQUIREMENT:** In accordance with Section 32 of The Vermont Recovery and Reinvestment Act of 2009 (Act No. 54), the following provisions and requirements apply to Bidder when the amount of its bid exceeds \$250,000.00.

Self-Reporting. Bidder hereby self-reports the following information relating to past violations, convictions, suspensions, and any other information related to past performance relative to coding and classification of workers, that occurred in the previous 12 months.

Summary of Detailed Information	Date of Notification	Outcome

Subcontractor Reporting. Bidder hereby acknowledges and agrees that if it is a successful bidder, prior to execution of any contract resulting from this RFP, Bidder will provide to the State a list of all proposed subcontractors and subcontractors’ subcontractors, together with the identity of those subcontractors’ workers compensation insurance providers, and additional required or requested information, as applicable, in accordance with Section 32 of The Vermont Recovery and Reinvestment Act of 2009 (Act No. 54), and Bidder will provide any update of such list to the State as additional subcontractors are hired.

Bidder further acknowledges and agrees that the failure to submit subcontractor reporting in accordance with Section 32 of The Vermont Recovery and Reinvestment Act of 2009 (Act No. 54) will constitute non-compliance and may result in cancellation of contract and/or restriction from bidding on future state contracts.

- D. **Executive Order 05–16: Climate Change Considerations in State Procurements Certification**

Bidder certifies to the following (Bidder may attach any desired explanation or substantiation. Please also note that Bidder may be asked to provide documentation for any applicable claims):

1. Bidder owns, leases or utilizes, for business purposes, space that has received:

- Energy Star® Certification
- LEED®, Green Globes®, or Living Buildings ChallengeSM Certification
- Other internationally recognized building certification:

2. Bidder has received incentives or rebates from an Energy Efficiency Utility or Energy Efficiency Program in the last five years for energy efficient improvements made at bidder's place of business. Please explain:

3. Please Check all that apply:

- Bidder can claim on-site renewable power or anaerobic-digester power ("cow-power"). Or bidder consumes renewable electricity through voluntary purchase or offset, provided no such claimed power can be double-claimed by another party.
- Bidder uses renewable biomass or bio-fuel for the purposes of thermal (heat) energy at its place of business.
- Bidder's heating system has modern, high-efficiency units (boilers, furnaces, stoves, etc.), having reduced emissions of particulate matter and other air pollutants.
- Bidder tracks its energy consumption and harmful greenhouse gas emissions. What tool is used to do this? _____
- Bidder promotes the use of plug-in electric vehicles by providing electric vehicle charging, electric fleet vehicles, preferred parking, designated parking, purchase or lease incentives, etc..
- Bidder offers employees an option for a fossil fuel divestment retirement account.
- Bidder offers products or services that reduce waste, conserve water, or promote energy efficiency and conservation. Please explain:

4. Please list any additional practices that promote clean energy and take action to address climate change:

E. Executive Order 02 – 22: Solidarity with the Ukrainian People

- By checking this box, Bidder certifies that none of the goods, products, or materials offered in response to this solicitation are Russian-sourced goods or produced by Russian entities. If Bidder is unable to check the box, it shall indicate in the table below which of the applicable offerings are Russian-sourced goods and/or which are produced by Russian entities. An additional column is provided for any note or comment that you may have.

Provided Equipment or Product	Note or Comment

Bidder Name: _____ Contact Name: _____

Address: _____ Fax Number: _____

_____ Telephone: _____

_____ E-Mail: _____

By: _____ Name: _____
 Signature of Bidder (or Representative) (Type or Print)

END OF CERTIFICATE OF COMPLIANCE

EXAMPLE: SUBCONTRACTOR REPORTING FORM

This form is provided for reference only and not required for proposals.

This form must be completed in its entirety and submitted prior to contract execution and updated as necessary and provided to the State as additional subcontractors are hired. The Department of Buildings and General Services in accordance with Act 54, Section 32 of the Acts of 2009 and for total project costs exceeding \$250,000.00 requires bidders to comply with the following provisions and requirements. Contractor is required to provide a list of subcontractors on the job along with lists of subcontractor's subcontractors and by whom those subcontractors are insured for workers' compensation purposes. Include additional pages if necessary. This is not a requirement for subcontractor's providing supplies only and no labor to the overall contract or project.

Subcontractor	Insured By		Subcontractor's Sub	Insured By

Date: _____

Name of Company: _____

Contact Name: _____

Address: _____

Title: _____

Phone Number: _____

E-mail: _____

Fax Number: _____

By: _____

Name: _____

Failure to adhere to Act 54, Section 32 of the Acts of 2009 and submit Subcontractor Reporting: Worker Classification Compliance Requirement will constitute non-compliance and may result in cancellation of contract and/or forfeiture of future bidding privileges until resolved.

Send Completed Form to:

Department of Public Service
Attention: Contract Administration
112 State Street
Montpelier, VT 05609-3001
Email: PSD.Administration@vermont.gov

ATTACHMENT: TRM EXAMPLES

Residential Efficient Water Heating Systems

VGS TRM Measure Number: 20104

Vermont (EVT) TRM Measure Number: N/A

Status: External Review

Effective Date: January 1, 2024

End Use: Hot Water

Program(s): Residential Equipment Replacement

Program Type: Equipment Replacement

Program Delivery/Implementation Type: Downstream

Measure Description

This measure applies to instantaneous or stand-alone direct fired hot water heaters in residential existing single-family homes. It also applies to domestic hot water (DHW) savings for combination space heating/DHW boilers. Savings are calculated for the equipment replacement at the end of useful life (EUL), assuming that homeowners will replace their existing water heaters on failure. Natural gas savings are due to the higher efficiency of the qualifying equipment. All systems must be installed per the VT Residential Building Energy Standards.

Baseline Equipment

Baseline equipment is a standard efficiency direct fired stand-alone or instantaneous water heater of the same type and size as the efficient equipment. For combination boilers, the baseline is a standard efficiency boiler matching the Residential Efficient Space Heating System measure. Baseline efficiencies are presented in Table 1. This measure assumes that all equipment being replaced is at the end of useful life (EUL), and as a result, the baseline is federal standards for all water heating equipment. If the draw pattern is unknown, use medium as the default.

Table 1a: Baseline Equipment Efficiency Standards¹

Unit Type	Size	Draw Pattern	UEF _B [*]
Stand-Alone Tank Water Heater	>20 gal and ≤55 gal	Medium	0.6483 - (0.0017 x V)
		High	0.6920 - (0.0013 x V)
Stand-Alone Tank Water Heater	>55 gal and ≤100 gal	Low	0.7689 - (0.0005 x V)
		Medium	0.7897 - (0.0004 x V)
		High	0.8072 - (0.0003 x V)
Instantaneous Water Heater	NA	All	0.81
Combination Hot Water Boiler ²	N/A	N/A	0.86 AFUE

^{*}V is the rated storage volume (in gallons)

Commercial Efficient Water Heating Equipment

VGS TRM Measure Number: 10101

Vermont (EVT) TRM Measure Number: N/A

Status: External Review

Effective Date: January 1, 2024

End Use: Water Heating

Program(s): Commercial Retrofit and Commercial Equipment Replacement

Program Type: Retrofit and Equipment Replacement

Program Delivery/Implementation Type: Downstream

Measure Description

This measure applies to direct fired stand-alone tank water heaters used in non-residential applications in existing buildings. This measure accounts for both retrofit equipment replacement (ER) and replacement at the end of useful life (EUL) scenarios. Fossil fuel savings are realized due to the higher efficiency of the qualifying equipment.

Baseline Equipment

Baseline equipment is a standard efficiency storage tank water heater, used in a non-residential application. Baseline efficiencies are detailed in Table 1.

For existing equipment being replaced at its end of useful life (EUL), the baseline equipment is a code compliant direct fired stand-alone water heater with the energy factor shown below (EF_{BEE}). For existing equipment being replaced prior to its end of useful life (Retrofit), the existing equipment efficiency is used as the baseline. When the existing equipment efficiency is unknown, the baseline equipment is an existing direct fired stand-alone water heater with the energy factor shown below (EF_{BEX}), which is based on ASHRAE 90.1 2010. The 2010 baseline was chosen as it matches to CBES 2011 requirements and the assumed average age of existing heating equipment installed in commercial buildings is greater than 14 years.

Efficient Equipment

The installed storage tank water heater must have an energy factor greater than the current code-compliant efficiency standards that are shown below in Table 1 (EF_{BEE}).

For residential duty storage tank water heaters with a rated input capacity less than or equal to 75 MBH, equipment standards are defined in terms of Energy Factor (EF) or Uniform Energy Factor (UEF), and for greater than 75 MBH, equipment standards are defined in terms of thermal efficiency (E_t). Energy Factor and uniform energy factor are determined on a 24-hour basis and includes standby or storage loss effects, while thermal efficiency does not. Therefore, if the equipment is large enough to be rated in terms of thermal efficiency, a percent standby loss factor must be included in the calculation as shown in the algorithms.