

REQUEST FOR PROPOSALS

May 15, 2017

Weatherization Assistance Program Energy Audit Services Dakota County, Minnesota

DEADLINE --- Thursday, June 1, 2017; 4:30 pm

A. Background:

The Dakota County Community Development Agency (the “DCCDA”) seeks proposals from qualified Energy Audit firms or individuals (the “Contractor”) offering energy audit services from 7/01/17 through 6/30/18 as required at various times and at several sites throughout Dakota County, Scott County, and Carver County. These services relate to implementing the requirements of Minnesota’s Weatherization Assistance Program (“WAP”) as further explained in the Minnesota Weatherization Program Policy Manual (rev. 1/23/2017 and located at: <http://mn.gov/commerce-stat/pdfs/wap-policy-manual.pdf>) and the Minnesota Weatherization Field Guide (located on the internet at: http://wxfieldguide.com/mn/MNWxFg_web_112516.pdf).

The DCCDA will need to obtain Energy Audits (“Audits”) for single family houses and mobile homes within the areas of Dakota County, Scott County, and Carver County, Minnesota. These units will be identified by the DCCDA as eligible and available for Audits based on previous contact with the owners. The DCCDA may select one or more Contractors to complete Audits during the contract period. It is estimated that the DCCDA will provide Contractor approximately 1 to 2 Audits per week during the 12-month contract period ending June 30, 2018. Depending upon workflow, at times 3 Audits a week will be provided by the DCCDA to the Contractor.

At the discretion of the DCCDA, any contract may be extended for two (2) additional one- (1) year periods. The DCCDA and the Contractor shall, as part of entering into, in each case, any contract extension period, agree upon the cost for all services, provided during any option period.

B. Scope of Services:

1. The Contractor will be commissioned to provide Audit services to the DCCDA during the contract period identified in Section A throughout the service area of Dakota County, Scott County, and Washington County. The Contractor will complete an Audit for each identified single family home using the National Energy Audit Tool (NEAT) Data Collection Form and for each mobile home using the Manufactured Home Energy Audit (MHEA) Data Collection Form (Exhibits C and D). The CDA’s Audit specifications are further identified in Exhibit B and within the State of Minnesota Policy Manual and/or Field Guide.
2. The Contractor shall provide the DCCDA a report as follows: complete the Audit data collection and secure client agreement to recommended weatherization work on the

signed Weatherization Services Agreement, all within the specifications identified in Exhibit B.

3. Further, the Contractor will be responsible for inputting the Audit data into Weatherization Assistance (WA) software, per the requirements provided by the Weatherization Coordinator.
4. The Contractor shall typically complete an Audit within thirty (30) calendar days from the time a work order request has been received from the DCCDA in the form of an e-mail attachment and/or paper copy containing client information. The completed Audit must be delivered to the DCCDA within seven (7) calendar days of the audit date.
5. NEW for 2017 is the inclusion of the Xcel Home Energy Savings Program (HESP) project that is available to eligible Carver and Scott County households. Contractor will be responsible for meeting HESP training requirements and providing educational visits for 1.5 – 2 hours at each home. See Exhibit C for more details.

C. Responsibility of DCCDA:

The DCCDA will provide the Contractor client information via e-mail attachments and/or paper copies (those persons qualified and in agreement with an Audit inspection). The DCCDA will work with the Contractor to identify a timeline for Audit completions based on the number and location of housing units on each list. The DCCDA Weatherization Coordinator will assist in coordinating the Audits to be completed by the Contractor. DCCDA will normally pay for services rendered within ten (10) working days of receipt of proper invoices and completed work reports.

The CDA may at its discretion deduct up to five percent (5%) from the contractual audit cost for unreasonable delays by the Contractor in auditing or returning completed audits, and for incomplete audits. This provision will be further defined in a contract between the DCCDA and Contractor.

D. Proposal Format & Requirements:

A written proposal submitted to the DCCDA shall include the following information.

1. **Exhibit A**, fee for each Energy Audit with a corresponding description of all items included.
Note: You may identify fee variations based on the number of Audit work orders being issued in total or per defined time period. Please include your estimated mileage cost in the overall fee.
 - a. Exhibit A also includes fee for Xcel HESP visit.
2. Projected turn-around time for one Audit.
3. List of current and past agency clients.
4. Staff and professional qualifications, including any applicable certifications/licenses.
5. Identification of at least three (3) references.

E. Additional Information:

Once the DCCDA selects one or more Contractors, additional information will be required as part of a service contract, including, but not limited to:

1. Proof of insurance (workers comp, liability, automobile).
2. Indemnification of the DCCDA.
3. Verification of necessary tools and equipment (equipment can be provided by the DCCDA if necessary).
4. Status as an independent contractor.
5. Pass a background check.

F. Proposal Evaluation:

Proposals will be evaluated on the following factors. The DCCDA has the right to reject any or all proposals without explanation.

1. Ability to perform services in a timely manner (15% of scoring).
2. Professional qualifications of the Contractor (15% of scoring).
3. Past performance, either with the DCCDA or with other clients (15% of scoring).
4. Reasonableness of proposed fees and costs associated with services (55% of scoring).

G. Submission Deadline: Submit sealed proposals (two copies, no faxes or emails) by 4:30 PM on Thursday, June 1, 2017 to:

Lisa Alfson, Director of Community & Economic Development
Dakota County CDA
1228 Town Centre Drive
Eagan, MN 55123

Further information may be obtained from Bruce Anderson, DCCDA Weatherization Coordinator at 651-675-4474 or banderson@dakotacda.state.mn.us.

EXHIBIT A

**FEE PROPOSAL FOR ENERGY AUDIT SERVICES
Dakota County CDA**

The undersigned does declare that this proposal complies with all Terms and Conditions as set forth in the Request for Proposals dated Thursday, June 1, 2017, and is made without improper connection with any other person making a proposal on this work, and is in all respects fair and without collusion or fraud.

The undersigned proposes a cost for an individual Weatherization Audit to be:

_____ Dollars (\$_____)

Will the cost (fee) per Audit change due to the number of Audits or the time period?

_____ Yes _____ No If yes, please explain:

The undersigned agrees to be paid up to \$65 per Xcel Home Energy Savings Program (HESP) project visit. Please initial here if you agree: _____. If not, explain why:

Firm Name: _____

Address: _____

Phone Number: _____ Fax Number: _____

Email Address: _____

I hereby certify that I am authorized to sign as a Representative for the Firm.

Signature: _____

Printed Name and Title: _____

EXHIBIT B

Energy Audit Specifications

Dakota County CDA will screen clients and provide client information, including an intake form, household demographic information, and heating fuel and electricity use data. The Contractor will make all audit appointments and provide educational handouts, including the required information about lead if a site-built home was built before 1978. CDA will provide a Client Notification sheet to be handed to the client with the educational materials.

All audit results must be submitted to Dakota County CDA in hard copy, using the NEAT (for site-built homes) or MHEA (for manufactured homes) Data Collection Form provided by the CDA. NEAT and MHEA Data Collection Forms are included as Exhibit C and Exhibit D.

The following signed forms must be submitted along with the Data Collection Form:

- Weatherization Services Agreement
- Safety Assessment
- Safety Assessment -- Mold and Moisture
- Client Participation Form
- Confirmation of Receipt of Lead Pamphlet
- Waiver for Insulation of Sidewalls (when sidewall insulation is recommended)

Photos fully documenting the home's interior and exterior conditions relevant to the weatherization program must be submitted on a flash drive. Audit write-ups shall at minimum comply with what is required for the DOE Low-Income Weatherization Program, and shall document all the following details that apply for all site-built and manufactured housing audits:

1. **Floor plan sketch:** Provide exterior perimeter measurements. Mark window and door locations on the floor plan drawing. Record the basement floor area and foundation details on the sketch and in the appropriate location in the Data Collection Form.
2. **Record measurements** and other descriptors of windows and doors in the Data Collection Form.
3. **Photo documentation** of unusual conditions and general layout, captioned for clarity if necessary.
4. **Describe attic hatch locations and conditions.** Give specific recommendations for repair, dams, insulation, and weather stripping.
5. **Attic conditions that require attention.** Identify and describe attic bypasses so costs can be estimated. Describe insulation type(s) and depth(s), including the estimated square footage of different types and/or depths if there is variable depth and/or type. Measure attic floor height changes so damming and attic wall insulation can be specified if needed. Describe signs of moisture, rot, raccoons, bats, frost, inappropriate use of unconditioned space, etc. Inform client of what they need to move or protect before weatherization. Type and condition of ceiling material can be important to note.

6. **Crawl space, basement and rim joist conditions.** Describe vents, measure or estimate exposed soil area and foundation cracks, record access details, and provide the square footage of exposed soil that must be covered with poly. Make insulation recommendations where appropriate, including wall height, rim joist and perimeter dimensions.
7. **Tuck-under garage ceilings.** Provide enough detail to estimate dense-packing garage ceilings under living space. Also note condition of sheetrock and whether the joints need to be fire taped, and the measured or estimated length of the joints that need taping or caulking. Make a reasonable assessment of whether the garage is too cluttered for access, and determine whether or not the client is willing and able to move stored items as needed.
8. **Document siding types, existing wall insulation, and recommended action.** CDA will provide a hard-copy Waiver for Insulation of Sidewalls, to be used for site-built audits only. If there are multiple floors or siding types, enough information must be documented to estimate those costs separately. Also note interior wall conditions, like paneling or thin or poorly nailed sheetrock that may not be strong enough for dense-packing cellulose.
9. **Document condition of ducts, duct boots** and registers. For mobile homes and for site-built homes with supply or return boots over unheated spaces, take pressure pan readings. Also take pressure pan readings for all ceiling boots or duct boots attached to attic ductwork. Make sure the reading locations are clear.
10. **Measure and document ceiling exhaust fan flow for bath fans.** Use a flow box. Also verify range hood flow: document whether it actually moves air out of the house or not.
11. **Document blower door test results.** Document test conditions (location of blower door, wind speed and direction, and indoor and outdoor temperatures). Repeat test with the air handler running and off if there is any ductwork in unconditioned space. If the difference between indoor and outdoor temperatures exceeds 10 degrees Fahrenheit, record the observed blower door reading in cfm50, and the temperature-corrected cfm50.
12. **Document zone pressures** for all attics, and crawl spaces. Drill a small hole if necessary, with client approval. Document the presence of ductwork. Check the zone pressures in mobile homes for the belly, water heater room and the attic.
13. **Perform combustion appliance zone (CAZ) depressurization testing using the protocol described in the Minnesota Weatherization Field Guide.**
14. **Complete furnace and water heater combustion and safety testing.** Fill in all the blanks in the Data Collection Form for the furnace or boiler and the water heater. Check furnaces for cracked heat exchangers. Measure CO for both appliances, and for gas range/ovens as well. Measure ambient CO in the mechanical room, in the kitchen if there is a gas range, and in the living space. Record the heat rise for all furnaces. Document safety problems, and notify the CDA of serious problems immediately. Record domestic hot water temperature at the tap for every audit. For mobile homes, you can often perform all or most tests on the water heaters but may only be able to check heat rise and

CO in the supply duct for mobile home furnaces in some cases. Provide the chimney liner diameter for all site-built homes.

15. **Document the condition of the dryer vent**, and give an estimate of materials needed if it should be vented or re-vented.
16. **Document details about the combustion air intake:** type, diameter, inside termination, outside location, proximity to exhaust vents if applicable.
17. **Document the age, make and model number, and condition of the refrigerator(s).** Meter the refrigerator(s) electricity use or estimate its electricity use based on age, condition, and refrigerator database information.
18. **Document all interior and exterior lighting fixtures and the type and number of light bulbs in each (and their estimated daily hours of use).**
19. **Record details about unusual problems**, such as the location and estimated area of loose plaster that must be repaired before insulating, and the estimated wall area of an attic stairwell that must be insulated, in addition to insulating the treads.
20. **Enter all required information in the Weatherization Assistant building modeling software (WA).** After completion of the Audit, the contractor must enter all data from Audits into WA, run the audit, and generate a list of all recommended weatherization measures. Adequate detail must be entered into WA to document all building conditions and allow the creation of detailed work orders for all recommended measures.

EXHIBIT C

Xcel Home Energy Savings Program (HESP)

New for 2017, the DCCDA has a contract with Sustainable Resources Center, Inc (SRC) to provide services under the Xcel Home Energy Savings Program (HESP) project to eligible households in Carver County and Scott County.

The Contractor will be responsible for several components of the HESP project on behalf of the DCCDA. The primary responsibility of the Contractor will be to conduct the HESP home visits. The home visit consists of a technical expert provided by the DCCDA (Contractor), to visit the customer's home for one and a half to two hours to perform a home electric and/or gas evaluation in areas that contain the greatest potential for energy efficiency improvements and identifying next steps for implementation of opportunities most useful to the customer.

A Home Visit will consist of:

- Customer education – Energy educator (Contractor) will discuss with the customer, energy conservation measures, emphasizing elements particular to that household;
- Analyze electric and/or gas consumption report with customer to determine where consumption occurs and how to minimize customer costs.

The Contractor will also be responsible for:

- Inspect and evaluate major appliances;
- Provide customer with recommendations for energy savings opportunities;
- Provide utility-approved printed materials to customers.

The home visits will generally be done in conjunction with a Weatherization Audit.

Trainings. The Contractor will be required to attend any required HESP training classes when scheduled.

Qualified Auditor. Qualified Contractor/Auditor must successfully complete background screening and drug testing and complete training provided by SRC.

The DCCDA is responsible for completing at least 12 HESP visits in the 2017 Calendar year.