



**EFFICIENCY MAINE TRUST
REQUEST FOR QUALIFICATIONS (RFQ) FOR
A HOME ENERGY SCORE PROVIDER**

RFQ EM-020-2024

Date Issued: April 30, 2024

Responses Due: May 24, 2024, 11:59 p.m. Eastern Time (US)

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Separate attachments:

Attachment A – Standard Agreement

Attachment B – Confidentiality, Non-Disclosure and Protective Agreement

SECTION 1 – RFQ INFORMATION AND INSTRUCTIONS

1.1 Purpose

The Efficiency Maine Trust (the Trust) is seeking a U.S. Department of Energy Home Energy Score Partner authorized to do scores in Maine to become the Trust’s designated Home Energy Score Provider. This provider will save scores done through its platform and allow interested parties to search its database.

1.2 Designated Contact Person for this RFQ

Anne Stephenson
 Assistant Deputy Director for Operations
 Efficiency Maine Trust
 Email: anne.stephenson@efficiencymaine.com

1.3 Schedule

	Milestone	Date/Deadline
1	RFQ Issued	04/30/2024
2	Questions Due	05/7/2024
3	Responses to Questions Posted	05/10/2024
4	Responses Due	05/24/2024, 11:59 p.m. Eastern Time (US)
5	Anticipated Decision Date	05/31/2024
6	Anticipated Contractor Start	06/14/2024

Schedule changes: The Trust reserves the right to modify this schedule at its discretion. Any changes or additional information regarding the RFP schedule and pre-bid activities, including responses to questions, will be posted on the RFQ EM-020-2024 webpage at <https://www.efficiencymaine.com/opportunities/rfq-em-020-2024/>.

1.4 Selection Term

The Trust will select a provider for a duration of up to two years from the date of its execution. The Trust reserves the right to negotiate an additional one-year renewal with the selected provider.

1.5 Submittal Deadline

All responses must be submitted electronically via the online Submission Form on the RFQ EM-020-2024 webpage (<https://www.efficiencymaine.com/opportunities/rfq-em-020-2024/>). Submissions must be received by the due date and time specified in section 1.3. Bidders will receive a time-stamped confirmation email when their proposals are submitted. (Note: There may be a delay of a few minutes between submission and this confirmation email). Any proposal received after the deadline will not be considered. Proposals must be complete when submitted; changes or additions will not be accepted after the specified due date and time, except for any clarifications requested of bidders by the Trust. The Trust encourages bidders to submit their proposals with sufficient time to account for any technological challenges (e.g., Internet disruptions).

1.6 Submitting Questions

It is the responsibility of all bidders and other interested parties to examine the entire RFQ and to seek clarification, in writing, if they do not understand any information or instructions. Questions regarding this RFQ must be submitted by email to the Designated Contact Person listed in section 1.2 prior to the due date for questions noted above in section 1.3. The subject line of the email should be: "RFQ 020-2024 Home Energy Score Provider." Responses to questions will be posted on <http://www.efficiencymaine.com/opportunities/rfq-em-020-2024>, as will all clarifications and amendments released in regard to the RFQ. It is the responsibility of all interested parties to check this website periodically to obtain clarifications and amendments. Only those clarifications and amendments posted on this website are considered binding.

1.7 Proposal Confidentiality

Bidders should be aware that information provided to the Trust is subject to the Maine Freedom of Access Act (FOAA), 1 M.R.S. §§ 401 et seq., unless there is a specific confidentiality exemption in the Efficiency Maine Trust Act, 35-A M.R.S. §10106. Bidders should assume that all information submitted in response to this RFQ will be considered public records available for public inspection pursuant to the Maine FOAA following announcement of an award decision.

1.8 Selection Decision

The Trust will notify all bidders by email of the contractor that is selected as the provider under this RFQ. The Trust reserves the right to negotiate the final terms and conditions the selected provider whose package is selected by the Trust, and to reject any selected provider with whom the Trust cannot agree to terms and conditions meeting the Trust's needs, in the Trust's sole judgment. The Trust reserves the right to reject any response that does not meet these requirements.

1.9 Contracting Process

The selection process is governed by the Efficiency Maine Trust Rule Chapter 1: Contracting Process for Service Providers and Grant Recipients, which can be found on the Trust's website: <http://www.efficiencymaine.com/docs/Chapter-1-Contracting-Process-for-Service-Providers-and-Grant-Recipients.pdf>.

1.10 Anticipated Contract Budget

The budget for this project is \$0. The Trust does not anticipate making any payments related to the designation of a Home Energy Provider.

1.11 RFQ Process – Reservation of Rights

The Trust reserves the right to cancel or extend the RFQ process at any time, and to issue clarifications and amendments to the RFQ. The Trust also reserves the right to reject noncompliant submissions in response to this RFQ. The Trust, in its sole discretion, reserves the right to recognize and waive minor informalities and irregularities found in proposals received in response to this RFQ. Issuance of this RFQ does not commit the Trust to make an award. The Trust will not pay any costs or expenses incurred by a bidder in connection with preparation of a response to this RFQ.

1.12 Contract Agreement

A copy of the Efficiency Maine Trust Standard Agreement appropriate to this RFQ is provided as **Attachment A – Standard Agreement**. The prequalified contractor and its agents and subcontractors will be required to execute a nondisclosure agreement (provided as **Attachment B– Confidentiality, Non-Disclosure and Protective Agreement**). Certain information regarding a customer that has participated or that may participate in a Trust program is deemed confidential by the Efficiency Maine Trust Act. See <http://legislature.maine.gov/statutes/35-A/title35-Asec10106.html> for additional information on related confidentiality restrictions.

1.13 Request for Reconsideration

An aggrieved person may request a hearing for reconsideration of a contract award decision by filing a written petition with the Executive Director of the Trust within 14 calendar days of the notification of the contract award. Each petition to reconsider must meet the requirements specified in Efficiency Maine Trust Rule Chapter 1, Contracting Process for Service Providers and Grant Recipients, Section 5(B), which can be found on the Trust's website under Documents and Services: <http://www.energymaine.com/docs/Chapter-1-Contracting-Process-for-Service-Providers-and-Grant-Recipients.pdf>

SECTION 2 –BACKGROUND INFORMATION

2.1 Efficiency Maine Trust

The Efficiency Maine Trust (Efficiency Maine) is the independent, quasi-state agency established to plan and implement energy efficiency programs in Maine. Through its suite of nationally recognized programs, Efficiency Maine provides consumer information, marketing support, demonstration pilots, discounts, rebates, loans, and other initiatives to promote high-efficiency equipment and operations that help Maine’s homes, businesses, and institutions reduce their energy costs and lower their greenhouse gas emissions. The result is job growth, better grid reliability, improved energy independence, a stronger local economy, and critical progress toward meeting the State’s climate change goals. Efficiency Maine is governed by a Board of Trustees with oversight from the Maine Public Utilities Commission.

2.2 RFQ Background

Pursuant to Title 35-A, Section 10117(4) of the Maine Statutes, the Efficiency Maine Trust (the Trust) shall:

Establish a home energy scoring system for residential buildings for the purposes of evaluating a building’s energy efficiency. The home energy score must estimate energy use and associated costs and assist with the identification of energy solutions to improve the building’s efficiency and be consistent with the United States Department of Energy asset-based home energy score. The trust shall establish a process by which a recipient of a home energy score may voluntarily report the score to the trust. The trust shall establish and maintain a database of these home energy scores.

Please [click here](#) for the statute.

The Trust issued a Request for Information soliciting comments and questions on approaches to a home energy score system in January 2024.

Based on the responses to the Request for Information, the Trust believes the best approach to fulfilling the statutory guidelines outlined above is to designate one of the five existing Home Energy Score Partners authorized by the U.S. Department of Energy to provide scores for Maine as the Trust’s recommended provider. This designee will be linked from the Efficiency Maine Trust website for homeowners, real estate professionals, and others interested in home energy scores. This designee will also act as the official database for scores. The Trust believes selecting one designee will better assist interested parties in Maine to find home energy scores, rather than directing interested parties to all five potential providers.

The Trust will select a designee based on the evaluation criteria outlined in section 5.

2.3 Additional Sources of Information

Following are links to additional information that bidders may find helpful in preparing a response to this RFQ:

TITLE	LOCATION (link)
Efficiency Maine Trust website	www.energymaine.com

TITLE	LOCATION (link)
Efficiency Maine Trust Annual Reports	https://www.energymaine.com/about/library/reports/
Efficiency Maine Trust – Triennial Plan	https://www.energymaine.com/about/library/policies/

SECTION 3 – POTENTIAL SERVICES AND ASSIGNMENTS

The Trust is seeking a home energy score provider to:

1. Continue to meet all of the requirements of a U.S. Department of Energy Home Energy Score Partner as outlined [here](#) including assessor support, quality assurance, etc.;
2. Provide a searchable online database or library of ratings;
3. Add new ratings completed in Maine to the database or library;
4. Align standard U.S. Department of Energy Home Energy Score reports and recommendations with [Maine's climate plan](#) and [Efficiency Maine](#) rebates; and
5. Answer questions from customers or interested parties about home energy scores and home energy score reports.

SECTION 4 –PROPOSAL REQUIREMENTS

4.1 Proposal Submission

Proposals must be submitted electronically via the online Submission Form on the RFQ EM-020-2024 webpage (<https://www.energymaine.com/opportunities/rfq-em-020-2024/>.) All proposals must adhere to the instructions and format requirements outlined in this RFQ, in the online Submission Form instructions, and in the written supplements and amendments issued by the Trust.

The online Submission Form will request the following documents:

- RFQ response
 - PDF format file named “Proposal_Bidder_Name_RFQ_020_2024”
- Attachment A - Standard Agreement [if applicable]
 - Word format file named “Standard_Agreement_Bidder_Name_RFQ_020_2024”

4.2 Format Requirements

Submissions will be evaluated for adherence to the following format requirements:

- Qualifications package must be typewritten.
- Pages must be numbered.
- Unnecessary attachments (e.g., any attachments beyond those sufficient to present a complete, comprehensive, and effective qualifications package) will not be considered in the evaluation of the submission.

4.3 Content and Organization Requirements

Submissions need only include company name, contract information, a brief description of how the elements of the Scope of Work (Section 3) will be met, and responses to the questions in the table below.

	Questions
1	<p>Experience</p> <ul style="list-style-type: none"> a. What year did you become Department of Energy (DOE) Home Energy Score (HES) Partner? b. How many home energy scores have been generated using your tools?
2	<p>Assessors available to homeowners</p> <ul style="list-style-type: none"> a. Number of HES assessors in US (indication of scale) b. Number of HES assessors in Maine (indication of resources available)
3	<p>Ease of becoming a provider</p> <ul style="list-style-type: none"> a. How many hours does it take a contractor/assessor to join your network? b. How many days does it take an assessor to join your network? c. How many hours per year does it take an assessor to remain in your network?
4	<p>Fees</p> <ul style="list-style-type: none"> a. What do you charge assessors to join your network? b. What annual fees are there for assessors to remain in your network? c. What do you charge assessors per HES?
5	<p>Score library/database</p> <ul style="list-style-type: none"> a. Are scores available to the public? b. What is the fee to search it (if any)? c. What is the fee to add a HES to it (if any)? d. How many properties in Maine are already in your database? e. Can users narrow their searches to specific addresses?

SECTION 5 –EVALUATION CRITERIA

Submissions that meet the requirements established in the RFQ will be evaluated by a review team. The Trust reserves the right to decide whether a proposal is acceptable in terms of meeting the requirements of this RFQ and to accept or reject any or all submissions received.

The review team will evaluate home energy score providers by the following selection criteria. Please provide brief answers in your RFQ response to each question:

	Category	Scoring
1	Statement of Work a. Does the Statement of Work present a comprehensive, sound approach for accomplishing the requirements of this RFQ? b. Is the Statement of Work thorough, specific, and responsive to the requirements and details specified in the RFP?	25
2	Experience a. What year did you become Department of Energy (DOE) Home Energy Score (HES) partner? b. How many home energy scores have been generated using your tools?	15
3	Assessors available to homeowners a. Number of HES assessors in US (indication of scale) b. Number of HES assessors in Maine (indication of resources available)	15
4	Ease of becoming a provider a. How many hours does it take a contractor/assessor to join your network? b. How many days does it take an assessor to join your network? c. How many hours per year does it take an assessor to remain in your network?	15
5	Fees a. What do you charge assessors to join your network? b. What annual fees are there for assessors to remain in your network? c. What do you charge assessors per HES?	15
6	Score library/database a. Are scores available to the public? b. What is the fee to search it (if any)? c. What is the fee to add a HES to it (if any)? d. How many properties in Maine are already in your database? e. Can users narrow their searches to specific addresses?	15
	TOTAL	100

In evaluating qualification packages, the Trust reserves the right to take any of the following steps, with respect to either all of the submissions received or to a subset of submissions selected as superior to the others: (1) schedule presentations or interviews with representatives of the bidder or persons proposed for the project; and (2) request additional data or supporting material.