



2019 REQUEST FOR PROPOSALS
Issued Wednesday 3.21.19
Due Wednesday 4.3.19

RFP Overview

This Request for Proposals (“RFP”) is issued by Civic Works, Inc. For purposes of this document, the party to whom this RFP is addressed shall be referred to as “Applicant” and any materials submitted in response to this RFP shall be referred to as a “Proposal.”

The purpose of this RFP is to solicit Proposals from firms interested in being selected as one of a small group of approved home performance contractors in partnership with Civic Works (each, an “Approved Contractor”). The Approved Contractors will provide whole-house auditing and/or home performance improvement services to leads generated by Civic Works.

The contents of this RFP include: 1) this RFP Overview Document and 2) the RFP Application, to be filled out by the Applicant.

This Overview document outlines the following information:

- 1) Organizational and Program Background
Describes Civic Works, the Retrofit Baltimore Program, and the Retrofit Baltimore Partnership Program
- 2) RFP Summary
Describes this RFP and its purpose
- 3) RFP Terms and Conditions
- 4) Program Requirements
To be agreed upon by the Approved Contractor through a Memorandum of Understanding with Civic Works
- 5) Minimum Contractor Qualifications
Required of the contractor in order to be selected and remain designated as an Approved Contractor
- 6) Technical Score
Criteria used to select Approved Contractors and rank them within the pool
- 7) Financial Score
Criteria used to select Approved Contractors
- 8) Applicant’s Proposal
Formatting and delivery instructions

The RFP Application requires the Applicant to provide specific information regarding its business and qualifications.

One (1) printed or one (1) electronic copy of the Proposal shall be submitted to the attention of Brooke Paluzzi at bpaluzzi@civicworks.com or 3501 Brehms Lane Suite B, Baltimore, MD 21213.

1. ORGANIZATIONAL AND PROGRAM BACKGROUND

Founded in 1993, Civic Works' mission is to strengthen Baltimore's communities through education, skills development, and community service. Since its inception, Civic Works has planted 25,477 trees in low-income communities, tutored over 56,000 students in after-school programs, provided over 5000 residents with career development opportunities, and provided home energy upgrades to over 20,000 households. Civic Works has been the recipient of several prestigious awards for excellence over the years, including recertification in 2011 of its Standards for Excellence Seal through the Maryland Association of Nonprofit Organizations. Civic Works' green initiatives have been highlighted by Green for All, The Baltimore Sun, The Washington Post, the US Conference of Mayors, and the Maryland Sustainable Growth Commission.

In June 2011, Civic Works launched the Retrofit Baltimore Program in order to help homeowners realize the benefits of home energy efficiency and create local family-sustaining jobs. By serving as a trusted resource, building relationships within communities, and empowering leaders to engage their own networks, Retrofit Baltimore has been uniquely effective at motivating homeowners to invest in home energy improvements. Retrofit Baltimore is intended to save energy, reduce carbon emissions, improve home comfort and home values, and create new jobs and long-term employment opportunities and career paths for Baltimore City residents.

In November 2012, Civic Works launched the Retrofit Baltimore Partnership Program (RBPP) and began partnering with a small group of private home performance contractors to provide home performance services to homeowners recruited by Retrofit Baltimore ("Program Participants"). Civic Work's periodically reissues an RFP to solicit Proposals from firms interested in being selected or maintaining designation as an Approved Contractor. Civic Works expects that each party will need to be reasonably flexible in making adjustments when needed, with the goal of perfecting the partnership.

Civic Works and the partner contractor will work together to:

- Improve the energy efficiency of homes throughout the Baltimore region
- Provide Baltimore City residents with access to home performance employment opportunities
- Offer competitive wages that lead to a lasting career-track and high quality labor
- Drive accountability and the continuous evaluation of performance toward goals
- For local Baltimore area businesses to retain highly-trained satisfied employees long-term.
- For businesses to invest in their employees, invest in quality service and quality employment

2. RFP SUMMARY

The purpose of this RFP is to solicit Proposals from firms interested in being selected or maintaining designation as one of a small group of approved home performance contractors in partnership with Civic Works (each, an “Approved Contractor”). The Approved Contractors will provide whole-house auditing and home performance improvement services to homeowners recruited by Retrofit Baltimore (“Retrofit Baltimore participants”). Retrofit Baltimore participants will be connected only with an Approved Contractor for their audit and home performance improvements. Civic Works will educate Retrofit Baltimore participants about the home energy audit and retrofit process. Once Civic Works has qualified Retrofit Baltimore participants – determining eligibility for various subsidized programs and/or likeliness to purchase home performance improvement services – Civic Works will then schedule the energy audits on behalf of the Approved Contractors. The Approved Contractors will take responsibility for the complete audit-to-retrofit process. Civic Works will also continue to track the customer through the process, provide necessary feedback and quality control, and serve as an advisor and an advocate on behalf of the customer.

The Approved Contractor will be required to have and maintain certain minimum qualifications and performance standards, as described herein, in order to be selected and remain designated as an Approved Contractor. In addition, Civic Works will evaluate Proposals and allocate a fluid ranking system among Approved Contractors within the pool based on a number of weighted factors. The purpose of this system is a) to set a high bar for entry into the pool of Approved Contractors and b) to create an internal competition between contractors that encourages ongoing progress towards creating family-sustaining jobs and quality work. The allocation of Retrofit Baltimore leads to the Approved Contractors will based on this ranking system of weighted factors.

The Approved Contractor may participate in one or all of the following programs. See enclosed Memoranda of Understanding for each program outlining requirements for each program.

- Maryland Department of Housing and Community Development (DHCD) Limited Income Energy Efficiency Program (with funding from EmPower Maryland and the Department of Energy).
<https://dhcd.maryland.gov/Residents/Pages/lieep/default.aspx>
- BGE Home Performance with ENERGY STAR
<https://bgesmartenergy.com/residential/home-performance-energy-star/find-contractor>
- The Maryland Energy Administration Program Low- and Moderate- Income Communities Grant (leveraging funding from the Maryland Energy Administration, BGE Home Performance with ENERGY STAR, and other)
<https://energy.maryland.gov/govt/Pages/LMI2018.aspx>

3. RFP TERMS AND CONDITIONS

- a) Civic Works is not liable for any costs or expenses incurred by an Applicant or any other person or entity in the preparation of their Proposal.

- b) Civic Works reserves the right to reject any and all Proposals received from Applicants as a result of this RFP, as is in the best interests of Civic Works, as determined solely by Civic Works. In determining which Proposals are best, Civic Works will take into consideration the home performance experience and qualifications of the Applicant as well as its history of providing family-sustaining jobs for Baltimore residents.
- c) This RFP may be sent as a courtesy to known interested individuals and firms. The receipt of this RFP from Civic Works in no way implies that the recipient is a qualified Applicant.
- d) If it becomes necessary to revise any part of this RFP, an addendum will be provided to all respondents or Applicants who respond to the original RFP, and will be posted online at www.retrofitbaltimore.civicworks.com/contractors
- e) The Approved Contractor shall be required to enter into a memorandum of understanding (“MOU”) with Civic Works in a form mutually agreed upon by Civic Works and such Applicant.
- f) If the Applicant subcontracts envelope improvements to a subcontractor, the subcontractor shall be required to also submit a Proposal, be selected as an Approved Contractor, and enter into an MOU with Civic Works.
- g) Continued participation by the Approved Contractor is dependent on a continued source of funding for Civic Works and may be withdrawn or canceled in Civic Works’ sole and absolute discretion.
- h) Only contractors that submit a current application for this RFP round will be considered for Approved Contractor status. Civic Works will re-issue the RFP annually.
- i) Civic Works will strongly take into account a previous Approved Contractor’s track record of good performance in the RBPP when deciding whether to renew its Approved Contractor status in a new RFP round.

4. PROGRAM REQUIREMENTS AND MINIMUM CONTRACTOR QUALIFICATIONS

An Approved Contractor shall enter into a MOU with Civic Works, Inc. A complete copy of the MOU is enclosed as follows:

- a) MOU
- b) Addendum A: Weighted Factors
- c) Addendum B: 2019 DHCD LIEEP Program
- d) Addendum C: Lead Generation and Energy Coaching for BGE Home Performance with ENERGY STAR
- e) Addendum D: 2019 MEA Grant-Funded Program

6. TECHNICAL SCORE

The following are the weighted factors that Civic Works will use to evaluate the Technical Application. The purpose of this system is to set a high bar for entry into the pool of Approved Contractors.

	Max Points Available	Points Awarded
<p>1) Customer Service and Administrative Quality <u>Points:</u> <i>a) References</i> <i>b) Project Management and Administrative Policies and Procedures</i></p>	10	
<p>3) Experience and Quality Control <u>Points:</u> <i>a) Experience</i> <i>b) Professional Staff</i> <i>c) Business Services</i> <i>d) Quality Control policies and procedures</i> <i>d) Supporting Documentation</i></p>	35	
<p>4) History of employing Civic Works' Center for Sustainable Careers (CSC) graduates: <u>Points:</u> <i>a) Based on the number of full-time equivalent workers that are graduates of CSC. Partial points awarded for the graduates from past CSC classes.</i> <i>b) Track record of promoting CSC graduates (i.e. auditor, crew leader, trainer, etc.)</i> <i>c) Track record of providing free professional development in energy efficiency- or construction-related areas, during which employees receive their normal rate of compensation.</i> <i>d) Following best practices by providing your criminal record relevance screen to your background check provider, so that hiring managers only see convictions relevant to the position.</i></p>	25	
<p>5) Providing family-sustaining wages and benefits: <u>Points:</u> <i>a) Providing family-sustaining wages to CSC graduates above the program minimum of \$15.50 per hour after the first 90 days of hire</i> <i>b) Health insurance, with points prorated by amount employer subsidy</i> <i>c) Dental and vision insurance</i> <i>d) Health insurance for employee's dependents</i> <i>e) Pension or other retirement plans</i> <i>f) Paid leave benefits</i> <i>g) Predictable scheduling and overtime practices that support the financial stability of frontline employees</i> <i>h) Benefits that strengthen the immediate financial stability of employees, such as allowing paycheck advances, childcare subsidies</i> <i>i) Company provided tools and safety equipment</i></p>	15	

6) Employee feedback, racial equity and inclusion <u>Points:</u> <i>a) Facilitate effective employee feedback loops, which result in concrete changes in workplace policies and practices</i> <i>b) Disaggregate workforce data by race and gender</i> <i>c) Implement policies and practices to address racial and gender disparities within the company</i>	10	
7) Status as or subcontracting envelope improvements with a business whose location is accessible by Baltimore residents, and/or a business that is Minority-, Woman-, or Veteran-Owned Business: <u>Points:</u> <i>a) Company distance from Baltimore City, accessibility by public transit, ability to meet at the company office (rather than the project site), and providing a company vehicle for transportation to project sites</i> <i>b) MBE status</i>	5	
Performance Standards Total	45	
Social Standards Total	55	
TOTAL	100	

7. FINANCIAL SCORE

All qualified applicants will be ranked from the lowest (most advantageous) to the highest (least advantageous) price based on the Total Proposal Price as submitted on the Financial Application spreadsheet.

8. APPLICANT'S PROPOSAL

Required Materials. The Applicant must include the following information in the Proposal:

- a) Fill out the Technical Application attached. The Proposal shall include all of the required information indicated in the Application. Failure to submit all required information may result in a request for prompt submission of missing information, giving a lowered evaluation of the Proposal, or rejection of the Proposal.
- b) Submit copies of relevant documents (as listed in the Application)
- c) Fill out the Financial Application attached. The Proposal shall include pricing for all measures listed. Failure to submit all required information may result in a request for prompt submission of missing information, giving a lowered evaluation of the Proposal, or rejection of the Proposal.
- d) Signed Copy of these RFP Terms and Conditions.

Format. The Proposal shall satisfy the following formatting requirements:

- The Proposal should be organized in the order in which the requirements are presented in the Application attached and should clearly indicate the section that is being addressed.

- The Proposal shall include all of the required information indicated.
- Any additional information may be included in the Proposal and will be considered.

Delivery Requirements. One (1) printed or one (1) electronic copy of the Proposal shall be submitted to Brooke Paluzzi, at the following addresses:

Electronic: bpaluzzi@civicworks.com
Printed: Attn: Brooke Paluzzi
Civic Works' Center for Sustainable Careers
3501 Brehms Lane, Suite B, Baltimore, MD 21213

All correspondence should be marked "Contractor Proposal" in the subject line or on the envelope, as applicable.