



THOMAS M. MENINO
MAYOR

City of Boston
Office of the Mayor
Environmental and Energy Services
James W. Hunt, III, Chief

REQUEST FOR PROPOSALS

Community-Based Marketing and Outreach of Weatherization and Energy Efficiency Services in Boston

Renew Boston Community Marketing and Outreach – American Recovery and Reinvestment Act: Energy Efficiency and Conservation Block Grants, US Department of Energy

August 9, 2010

Proposals Due:

September 10th, 2010 by 4:00 p.m.

Late or incomplete proposals will be rejected as being non-responsive.

Deliver complete, separately sealed Technical and Price proposals to:

Bradford Swing, Director of Energy Policy
Office of the Mayor
Environmental and Energy Services
Boston City Hall, Room 603
Boston, MA 02201

For further information, please contact
Bradford Swing at: (617) 635-3425

The City of Boston reserves the right to reject any or all proposals.

In compliance with federal and state equal employment laws, equal opportunity will be afforded to all applicants regardless of race, color, sex, age, religious creed, disability, national origin, ancestry, sexual orientation, marital status, prior psychiatric treatment, or military status. It is unlawful in Massachusetts to require or administer a lie detector test as a condition of employment. An employer who violates this law shall be subject to criminal penalties and civil liability.

**Community-Based Marketing and Outreach of Energy Retrofits
Renew Boston—Department of Energy
August 9, 2010**

Table of Contents

| <u>SECTION AND ITEM</u> | <u>PAGE</u> |
|---|-------------|
| I. INTRODUCTION | |
| A. Renew Boston Outreach Program | 3 |
| B. Source of Funding | 5 |
| C. Purpose of Funds | 5 |
| D. Eligible Applicants | 6 |
| E. Application Process and Schedule | 6 |
| F. Pre-Proposal Conference | 7 |
| G. Contact Information | 7 |
| H. Indemnification | 7 |
| II. SCOPE OF WORK AND TIMETABLES | |
| A. Scope of Work for Delivery of Services | 7 |
| B. Timetables | 8 |
| III. PROPOSAL REVIEW PROCESS | |
| Selection Criteria | 8 |
| IV. PROPOSAL SUBMISSION REQUIREMENTS | |
| Proposal Submission Requirements | 8 |
| V. APPENDICES | |

I. INTRODUCTION

A. Renew Boston Community Marketing and Outreach Program

The City of Boston acting through the Mayor's Office of Environmental and Energy Services at One City Hall Plaza, Room 603, Boston, MA, 02201, seeks proposals from community-based organizations (CBO) to activate the Renew Boston Community Marketing and Outreach program by conducting outreach to Boston residents to participate in utility-administered energy efficiency programs and services. This grant opportunity is funded through the American Recovery and Reinvestment Act of 2009 (ARRA), Energy Efficiency and Conservation Block Grant (EECBG).

In 2009, Mayor Thomas M. Menino announced the development of the Renew Boston program to serve all types of business all across the city. Renew Boston is an innovative network of energy efficiency and alternative energy service provision catalyzed by City government that works with NSTAR and National Grid and coordinates job training programs, for-profit and non-profit partners to help Boston residents, businesses, and institutions save energy and money, and to create jobs. In 2008, the Massachusetts Green Communities Act directed electric and natural gas utilities to help customers take all cost-effective measures for energy efficiency. Over the next three years, Boston ratepayers will pay roughly \$145 million to fund utility energy efficiency programs. The Renew Boston Community Marketing and Outreach Program will ensure that Boston residents access their fair share of these resources and achieve the maximum benefit utility efficiency and renewable energy programs. Renew Boston will provide guidance, coordination, monitoring of work quality, and verification of energy savings to Boston residents and businesses wanting to upgrade heating and cooling equipment, insulate walls, weatherize doors and windows, and take other efficiency steps.

The goal of the Renew Boston Community Marketing and Outreach program generally is to ensure that new City-supported energy efficiency programs are accessed by communities that have traditionally not been served by ratepayer-funded energy efficiency programs. Energy efficiency programs have had limited success reaching low- and moderate-income homeowners, landlords, renters and condominiums. Successful applicants will propose innovative marketing approaches that will target these underserved communities. Recent polling results from the Community Workshops on Climate Action conducted in conjunction with the Mayor's Climate Action Leadership Committee's recommendation process indicated that residents trust local community groups and non-profit organizations more than City government and utilities. Renew Boston aims to harness this trust to help residents gain access the energy efficiency programs available to save participants money and energy, provide home improvements and a healthier home/business environment.

The City of Boston and its utility and community partners are developing a community outreach infrastructure that ultimately will include (1) a Renew Boston Office, (2) three to six Renew Boston Neighborhood Network Coordinators (both jointly funded by the utilities and City-coordinated funds) and (3) a Renew Boston community outreach training program operated by Mass Energy Consumers Alliance. Renew Boston Community Marketing and Outreach Program partners will be expected to use Renew Boston branding and marketing materials and to participate in Renew Boston information technology systems developed to track interactions with energy efficiency program participants and energy and greenhouse gas emissions savings. Program partners will be asked to assist Renew Boston in tailoring outreach and marketing materials to their target demographic, to develop approaches to follow-up with program participants who after a home energy assessment do not follow through energy efficiency retrofit work, and to track lessons learned from participants who completed retrofits.

In September, the City of Boston will issue a Request for Qualifications that will (1) seek applications from Community-based Organizations interested in hosting one of the Renew Boston Neighborhood Network Coordinators and (2) set forth the process for the selected CBOs to work jointly with the City's Renew Boston office to hire the Renew Boston Neighborhood Network Coordinator who will work at that site. Respondents to this RFP will not be foreclosed from responding to the upcoming RFQ or from applying to serve as one of the Renew Boston Neighborhood Network Coordinators.

The first initiative that the Renew Boston Community Marketing and Outreach Program will support is Renew Boston's \$1.8 million residential energy efficiency retrofit program. For over 3000 Boston residents within 60-120% median income and who live in buildings of 4 or fewer housing units, \$1.8 million from the EECBG will provide the final 25% cost of insulation projects that utilities currently fund with a 75% rebate. Mass Energy Consumers Alliance (Mass Energy) and Next Step Living (NSL) won the competitive procurement. Under its contract, Mass Energy will work with Boston residents to determine whether individual household income qualifies the resident for low-income (under 60% median income) energy efficiency program work available from Action for Boston Community Development (ABCD) or qualifies for the EECBG-funded insulation project work. This solicitation seeks proposals from CBOs to assist the City immediately to market this specific EECBG-funded initiative. In 2011, Renew Boston Community Marketing and Outreach Program participants will work with the City's Renew Boston Office to develop outreach to connect Boston residents with MassSAVE, the statewide energy efficiency program developed by Massachusetts utilities, service providers, and state organizations to provide services, incentives, information that is currently undergoing comprehensive program redesign.

About EECBG

ARRA allocated \$6,506,200 to the City of Boston through the U.S. Department of Energy's EECBG. The City's EECBG strategy focuses on providing Boston's residents and small businesses with the financial resources they need to make their homes and workplaces more efficient while also helping them cut their energy bills. The City has developed a plan that will stretch Boston's federal dollars by leveraging existing utility programs and by accessing private-sector financial resources. The City's EECBG initiative sets an ambitious goal of reducing the City's greenhouse gas emissions by 40,000 metric tons annually. Boston's plan will also stimulate green industries and create 100 high-quality green-collar jobs.

ARRA designed to save and create jobs, boost the economy, and transform it for long-term growth and stability. The Act mandates a high level of transparency, oversight and accountability in order to ensure taxpayer dollars are spent wisely and the public can see the results of its investment.

ARRA includes funds for cities and towns to create and implement strategies to: (1) reduce fossil fuels in a way that is environmentally sustainable and maximizes benefits for local communities, (2) reduce the total energy use of cities and towns, and (3) improve energy efficiency in the building sector, the transportation sector, and other appropriate sectors. These funds are being distributed through the EECBG, a program first authorized under the Energy Independence and Security Act of 2007.

B. Source of Funding

The Renew Boston Energy Outreach and Marketing program funding will come from ARRA through the U.S. Department of Energy's (DOE) EECBG program. The City of Boston's Energy Efficiency Conservation Strategy for the EECBG program, as approved by DOE, allocates \$150,000 for this program. Pursuant to DOE's approval, all of the City's EECBG funds, including this RFP's \$150,000, must be fully dispersed by March 30, 2012. For the purposes of the grant, the City of Boston's Office of Environmental and Energy Services will act as lead agent. Environmental and Energy Services will coordinate the review of all proposals, selection of recipients, all scope of work activities and requisitioning of funds from DOE for payment.

C. Purpose of Funds

This program will select vendors to reach out to Boston neighborhoods to market the Renew Boston Residential Energy Efficiency program. Program participants will support Renew Boston's contractee Mass Energy in its work with Boston residents to determine whether individual household income qualifies the resident for low-income (under 60% median income) energy efficiency program work available from Action for Boston Community Development (ABCD) or qualifies for the EECBG-funded insulation project work. In 2011, Program participants will work with the City's Renew Boston Office to develop outreach to connect Boston residents with MassSAVE, the statewide energy efficiency program developed by Massachusetts utilities, service providers, and state organizations to provide services, incentives, information that is currently undergoing comprehensive program redesign. After grants under this RFP are awarded, the City of Boston and its partners will provide required training to awardees and their volunteers on the energy efficiency programs on the basics of energy efficiency and available programs.

Applicants are expected to outline their capacity to reach out to as many residents as possible by targeting specific demographics and/or geographic locations, as well as following up with interested parties to encourage participation. Renew Boston encourages applicants to use both proven and experimental outreach strategies, to leverage existing relationships, and to use volunteers to reach their target groups and goals.

Engage Residents of Housing with 4 or fewer Housing Units

Grant funds will be used to engage residents who live in buildings of 4 or fewer housing units. The utility energy efficiency program categorizes the residential market into two groups: small (1-4 units) and large (4 units and above). The Renew Boston Energy Efficiency Retrofit of Existing Homes is designed specifically for the utility's small residential program; residents of large multi-unit housing will not be eligible for this EECBG-funded program. Renew Boston and the Department of Neighborhood Development will issue a separate EECBG-funded RFP to support energy efficiency for low-income multi-family housing.

Additional Goals

With more than sixty-five percent of Boston city residents living in rental housing, finding effective methods for renters to access energy efficiency programs is important to the success of Renew Boston. Many rental property owners in the city have been reluctant to weatherize due to a number of concerns, including the split incentive of tenants paying the utility bills and landlords paying for the upgrades.

Reducing the use of energy can also be achieved by changing how residents use energy. In addition to promoting enrollment in energy efficiency program, awardees will be given tools to educate residents on easy ways to use less energy through changes in behavior.

D. Eligible Applicants

Eligible applicants include non-profit organizations with experience in marketing, outreach and community organizing in Boston. Proposals must demonstrate capacity to reach, educate and follow-up with residents and small businesses regarding participating in energy retrofit programs offered by the local, state and federal governments while minimizing administrative costs.

Environmental and Energy Services will award multiple contracts of \$5,000 to \$15,000 under this grant. The contract amount for each grant will not exceed \$15,000.

E. Proposal Process and Schedule process

Applicants must submit an original and three (3) copies of the Technical Proposal in a sealed envelope marked "Renew Boston Community Marketing and Outreach - Technical Proposal". Additionally, applicants must submit, under separate cover and in a separate sealed envelope, three (3) copies of their Price Proposals marked clearly "Renew Boston Community Marketing and Outreach - Price Proposal". These envelopes must be delivered to the address below no later than 4:00PM, Eastern Standard Time on September 10, 2010.

Completed Technical and Price Proposals must be submitted directly to:

**Bradford Swing
Director of Energy Policy
Office of the Mayor
Environmental and Energy Services
Boston City Hall, Room 603
Boston, MA 02201**

Absolutely no proposals will be accepted after 4:00PM, Eastern Standard Time on September 10, 2010.

PLEASE NOTE: ENVIRONMENTAL AND ENERGY SERVICES HOURS OF OPERATION ARE MONDAY - FRIDAY 9:00 A.M. TO 5:00 P.M. PLEASE PLAN ACCORDINGLY.

Environmental and Energy Services reserves the right to waive portions of the RFP for all proposals, to excuse minor informalities on proposals, or to reject all proposals, if deemed in the best interest of the City and Environmental and Energy Services.

All proposals will be reviewed by Environmental and Energy Services staff and representatives of the Mayor's Office for eligibility under the program. A contract will be awarded to the responsible and responsive proposer with the most advantageous proposal, taking into consideration all evaluation criteria.

F. A Pre-Proposal Conference

A pre-proposal conference will be held on August 23, 2010 from 3:00-5:00PM in Room 900 of Boston City Hall. We encourage written questions in advance, answers to which will be provided at the pre-proposal conference. Minutes of the pre-proposal conference will be available upon request three (3) days after the meeting. To RSVP or request pre-proposal conference minutes, please send an email to Jacob.Glickel@cityofboston.gov.

G. Contact Information

Questions regarding this RFP should be directed to Bradford Swing, Director of Energy Policy at Environmental and Energy Services, who may be reached by telephone at (617) 635-3425 or by e-mail at brad.swing@cityofboston.gov.

H. Indemnification

To the fullest extent permitted by law, the successful applicant shall indemnify, defend and hold harmless the City, its employees, officers, representatives, and agents from and against any claim, loss, damages, injury, expense (including attorneys' fees), judgment or liability associated with the Project and any duties, activities, or services described in this RFP and made part of the Contract, to the extent that such claim, loss, damages, injury, expense, judgment or liability is caused either by defects in products supplied by the successful applicant hereunder or by the willful or negligent act or omission of the successful applicant, its employees, officers, representatives, and agents.

II. SCOPE OF WORK AND TASK TIMETABLE

A. Scope of Work

1. Appoint a coordinator within your organization who will be employed to run the grant program and be the primary contact to Renew Boston and its partners.
2. Develop a plan for recruiting volunteers, if applicable, to participate in the Renew Boston Community Training Center.
3. Attend Renew Boston Community Training Center for training on energy efficiency program offerings, Renew Boston information, program design and reporting requirements.
 - a. Maintain ongoing communication with the Renew Boston Community Training Center for program updates and assistance with outreach message.
4. After attending the Renew Boston Community Training Center submit an updated community outreach plan to Renew Boston.
5. Provide contact information of residential units eligible for energy efficiency retrofits to Renew Boston Residential Program.
 - a. Follow up with eligible leads that have not completed energy efficiency retrofit.
 - b. Follow up with leads that have completed energy efficiency retrofit to record experience with energy efficiency programs.
 - c. Respond to Renew Boston program-related communication
6. Attend Renew Boston outreach network meetings.
7. Prepare for and attend a close-out interview on experiences and lessons learned from the grant award and prepare a summary report.

B. Task Timetable

1. Within twenty (20) days of initial approval, have all required contract documents submitted to Environmental and Energy Services.
2. Within fifteen (15) days of receiving final approval from the City of Boston, the grantee may be expected to report on the progress of the grant program and have signed up for the Renew Boston Community Training Center.
3. Over 50% of grant funding must be invoiced before December 31, 2010
4. Provide regular updates to the Renew Boston and Mass Energy (residential contractor)

III. PROPOSAL REVIEW PROCESS

Selection Criteria

All proposals will be evaluated and judged on a comparative basis by Environmental and Energy Services. Proposals will be initially screened to determine responsiveness.

Proposals passing the initial screening will be reviewed for technical merit, project installation expertise, and evidence of participation in similar or comparable Scope of Work activities. Proposals identified as having sufficient technical merit will be reviewed for organizational experience and capacity development, and ability to fulfill vendor tasks in a timely manner. Price Proposals will then be reviewed as to the administrative and total costs to provide the program services.

Environmental and Energy Services is under no obligation to fund any proposal.

IV. PROPOSAL SUBMISSION REQUIREMENTS

The proposal submission to this RFP must detail how the organization(s) proposes to carry out the Scope of Work tasks outlined in the RFP. It must also contain information on the qualifications, experience and key personnel of the respondent. As discussed in the RFP's introduction, the city is working with Mass Energy to establish a training center for all community-based outreach performed under the Renew Boston. As indicated in the Scope of Work # 4, a grant recipient will "after attending the Renew Boston Community Training Center submit an updated community outreach plan to Renew Boston."

In narrative form:

THE TECHNICAL PROPOSAL

1. Identify the target audience for this grant. For example target demographics could include geographic, social, economic, cultural, and religious groups or any number of combinations.
2. Describe the proposer's approach to performing the energy efficiency services outlined in the grant. Proposers must demonstrate a thorough understanding of the Scope of Work and describe the expertise and capacity to complete the services.
3. Describe the proposer's plan for initial outreach and follow-up.
4. Outline the plan's projections for the numbers of residents contacts and the number of leads connected to Renew Boston Residential program.

5. Describe in detail experience with projects that involved work similar to this scope of work. Note the name, start and end date of the project, and tasks performed. Include a client contact name and telephone number for reference.
6. Include biographies of key personnel who will be working on the program and additional relevant references.
7. Describe the proposer's ability to meet reporting requirements.

THE PRICE PROPOSAL (ALSO SEPARATE FROM THE TECHNICAL PROPOSAL AND SEALED)

8. Detail the administrative costs that will be charged. The proposer must detail the total cost to perform all scope of work tasks, which will be a "not to exceed" amount. Upon selection, the vendor will enter into a contract with Environmental and Energy Services for the total cost stated; work tasks will be performed and compensated on an hourly basis.

Additional Materials

Visit MassSAVE.com to learn more about home energy assessments and available incentives.