

RFP # 10 - 015

Home Retrofit Program

**THERMO-SCAN INSPECTIONS (TSI) IS SEEKING INDIVIDUAL(S), FIRM(S) OR ORGANIZATION(S) TO PROVIDE
Direct Installation Services of Insulation and Air Sealing Products in Single Family Homes**

PROPOSAL ISSUED: JUNE 17, 2010

PROPOSALS DUE: JULY 9, 2010, 2:00 P.M. EST

**Thermo-Scan Inspections is not responsible for any delays
in the electronic or physical delivery of proposals.**

PROPOSALS RECEIVED AFTER THIS DATE AND TIME WILL NOT BE ACCEPTED

1. Background

- 1.1. Duke Energy is encouraging their customers to become more energy efficient by improving the efficiency of the home's building shell. Thermo-Scan Inspections (TSI) has been contracted by Wisconsin Energy Conservation Corporation (WECC) to oversee the project.
- 1.2. The Duke Energy Retrofit Program works with eligible residential customers to install cost effective energy efficiency measures. Information and financial incentives are offered to help customers implement energy efficiency improvements that otherwise would not get completed, or to get projects completed sooner than scheduled. These initiatives help residents manage rising energy costs, promote in-state economic development and protect our environment.
- 1.3. TSI is seeking a firm(s) to install air sealing measures and attic, wall, floor, duct and rim joist insulation to eliminate thermal bypasses. The supervisory and field staff of the selected firms will be required to attend three (3) days of training in Spartanburg, SC conducted by program staff and others the second week in August, 2010. It is anticipated that contract(s) will be awarded by July 19, 2010, and will continue until program completion.
- 1.4. Scope of Project: the Duke Energy Retrofit Program is requesting proposals from firm(s) that can provide direct installation services of attic, wall, floor, duct and rim joist insulation and blower door guided air sealing measures to eliminate thermal bypasses as well as combustion safety testing to the Building Performance Institutes (BPI) protocols. Eligibility for this direct install program is defined as a customer who owns and occupies a single family home and has been a Duke Energy customer for the previous ninety (90) days. Homeowners who enroll in this program may receive an incentive for installing insulation and air sealing measures.

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This air sealing and insulation is one component of the Duke Energy Home Retrofit Program. Eligible homes will also receive an energy audit.

Project Goals: Duke Energy will send targeted customers an offer letter to participate in the pilot retrofit program. It is expected that the selected contractors will provide air sealing and insulation services to at least 100 of the homes receiving energy audits.

- 1.5. Work Tasks: Below is a representation of the work duties the selected contractor(s) will be required to complete:
 - 1.5.1. Review detailed work order received from TSI via email. Note any special conditions and contact TSI if there are any questions concerning the work scope. In addition to air sealing and insulation, the work scope may include items such as upgraded attic ventilation, extension of bathroom or dryer vents through the roof or walls, installing bathroom exhaust fans and other related measures.
 - 1.5.2. Scheduling: Homeowners must be contacted by contractor (within three working days of receiving the work order) to schedule the work at a time convenient with the homeowner. In no case shall the work be scheduled out longer than 15 days after the initial customer contact without prior written approval by TSI.
 - 1.5.3. Combustion safety testing: All homes that have gas, propane or oil burning appliances will be tested for combustion safety before and after any retrofits by the selected contractor. Testing will be in accordance with the Building Performance Institute (BPI) protocols. The contractor must have the skills and equipment or team up with a person or organization that does have the skills and equipment to conduct this testing. These protocols will be covered in the training sessions provided by the program administrator.
 - 1.5.4. Measure Installation: Contractor will complete all insulation/air sealing work within three work days unless prior documented approval is given by TSI. All measures must be installed according to program and manufacturers specifications. Upon completion of the work, contractor will have homeowner sign off that the work was completed to their satisfaction and collect the homeowner's portion of the invoice (check, money order or credit card). Contractor sends by email all completed work orders, signed by customer, weekly to TSI.
 - 1.5.5. Customer Service: Contractor will provide professional and courteous service to each customer which includes, but is not limited to clean and neat clothing, vehicles and personnel, respect for the customer's property and possessions during each visit or interaction with the customer and on-time arrival for scheduled appointments. If a scheduled appointment time cannot be met, the contractor will notify the customer of the delay.
 - 1.5.6. Payment terms: Contractors invoices TSI monthly for completed and inspected work after subtracting the amount collected from the homeowner. The amount collected by the contractor will be the total cost minus the contribution by Duke Energy. The contractor will invoice TSI the amount of the Duke contribution monthly. No change orders will be allowed unless pre-approved in writing by TSI before the additional work has started. All change order invoices must be submitted at the time of the original invoice.

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- 1.5.7. Warranty: Contractor must warrant that all installed products be free of defects in material and workmanship for one year from the date of installation. If a warranty claim is made by the homeowner within the one year warranty period, the contractor will endeavor to resolve the claim to the customer's satisfaction within 14 days of receiving the claim, at no cost to the homeowner or TSI.
- 1.5.8. Quality Assurance: Contractor must provide a written quality assurance plan. TSI may conduct visual inspections on all the work performed. TSI will conduct inspections for the first 5 completed jobs per contractor crew, then random QA inspections on 20% of the completed homes, utilizing thermal imaging, blower door tests and combustion safety protocols to determine if the insulation and air sealing measures were installed according to program specifications and industry standards. Any deficiencies will be repaired within 14 days of the contractor receiving notice, at no cost to the homeowner or TSI. Contractors who have failed inspections after the first 5 inspections will be required to participate in additional training, at their own expense, and will return to 100% inspection of completed job for the next 3 jobs after the second training session. If a second inspection failure occurs after the additional training, the Contractor will be removed from the program.
- 1.5.9. Reporting: a) Weekly: a report will be generated by contractor from information collected and entered into the Program spreadsheet (supplied by TSI) providing a summary and details of the installations completed. b) Monthly: a report must be submitted by the contractor to TSI by email on or before the first business day of each month communicating the monthly results, activities and issues that need to be addressed.
- 1.6. All materials for direct installation will be provided by the contractor and must be approved for use by TSI before installation.
- 1.7. The contractor must provide all equipment, manpower and transportation necessary to perform the services.
- 1.8. Requirements:
 - 1.8.1. Insulation and air sealing measures must be installed by the contractor's employees.
 - 1.8.2. Lead safe work practices are to be followed in all homes built prior to 1978.
 - 1.8.3. Contractors work must meet the installation requirements set forth by the Southeast Weatherization Field Guide, the Contractor Workbook provided at training, as well as manufacturer's guidelines and local codes.
 - 1.8.4. Prior to program launch, Contractors will participate in two days of classroom training and one day of field training on the program and will agree to have a trainer "shadow" the crew during the first few installations for additional training.
 - 1.8.5. Bids must be provided on page 2 of the Cover Sheet to include a price per unit which includes all time, materials and any expenses.

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- 1.8.6. Obtain all necessary permits required by law and abide by all federal, state, and local codes.
- 1.8.7. Submit copies of any required permits to TSI prior to commencement of work.
- 1.8.8. Maintain insurance in the forms and amounts acceptable according to the Agreement for Independent Contractor Services: Provide TSI with copies of the below insurance requirements upon signing of the contract.
 - 1.8.8.1. Commercial General Liability - \$1,000,000 per Occurrence and in the Aggregate.
 - 1.8.8.2. Workers compensation insurance at the statutorily required amount for all employees.
 - 1.8.8.3. Auto Insurance \$1,000,000 per Individual and per Accident.
2. The contractor will be required to conduct criminal background checks on all personnel who will have access to participating homes. The background checks are meant to minimize the risk to the occupants of the households that may be presented by persons with prior criminal activity. No convicted felons are eligible to work on this project. TSI reserves the right to review the results of the background checks.
3. General Proposal Requirements
 - 3.1. Each proposal package should include the following information to be considered for the work:
 - 3.1.1. Completed Cover Letter
 - 3.1.2. Statement of capability - please summarize all of the information in the capability statement including the following:
 - 3.1.2.1. Business history – how long in business at the current location;
 - 3.1.2.2. Three credit references with suppliers and financial institutions with contact name address and phone number;
 - 3.1.2.3. Size of workforce – how many employees will be available to assign to this work;
 - 3.1.2.4. Previous experience delivering services equal to or similar to that described above, and to what capacity. Include any and all training and/or certifications obtained by the company and/or its employees that document company and staff's experience; and
 - 3.1.2.5. Company's capacity to utilize electronic communications.

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3.1.2.6. Proposed plan to deliver requested service.

- a) Describe how your firm would provide the services requested, including a description of the resources and personnel that you would make available to accomplish the goals of this project and the region your firm would serve.
- b) Demonstrate the ability to provide customer service support throughout the utility service area for which you are bidding. Describe how you will accomplish and/or comment on the following:
 - i. Start-up / ramp-up of production.
 - ii. Work plan to achieve estimated company production goals.
 - iii. Customer complaint resolution.
 - iv. Warranty of installed measures.
 - v. Installation guidelines for your installers.
- c) Quality control / quality assurance. Describe your approach to providing quality control/quality assurance as part of your management of field installation crews.

3.1.3. Provide a listing of three references for similar projects, installed by your firm over the past three years; include the name of customer, address, and contact person and telephone number for reference purposes.

4. Proposal Selection and Award Process

4.1. Preliminary Evaluation

The proposals will be reviewed by TSI to determine if all requirements are met. Failure to meet all requirements will result in rejection of the proposal. In the event that all proposers do not meet one or more of the requirements, TSI reserves the right to continue the evaluation of the proposals and to select the proposal which most clearly meets the requirements specified in this RFP.

4.2. Proposal Scoring

4.2.1. Accepted proposals may be evaluated using a two tier process. Tier I will include review by an evaluation committee and scored against the stated criteria. A Proposer may not contact any member of an evaluation committee. The committee may review references, request interviews, including on-site visits and use the results in scoring the proposals. The evaluation committee's scoring will be tabulated and proposals ranked based on the numerical scores received.

4.2.2. The Tier II scoring process may be used for the highest scoring contractors who may be asked to participate in an interview after proposals have been scored under Tier I by the evaluation committee.

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4.3. Evaluation Criteria

4.3.1. The following elements will be weighted as described in scoring a proposal for Tier I:

4.3.1.1. Overall Price (45 points).

4.3.1.2. Prior experience / References (30 points).

4.3.1.3. Work plan detail and logic (10 points).

4.3.1.4. Permanent office centrally located within the counties of work activity. (10 points)

4.3.1.5. Completeness of the proposal. (5 points)

4.4. Notification of Intent to Award

4.4.1. All contractors who respond to this RFP with a proposal will be notified in writing of TSI's intent to award the contract(s) as a result of this RFP. It is anticipated that multiple contractors will be chosen.

4.4.2. Copies of proposals will not be made available for public inspection.

5. Terms and Conditions

5.1. Contractor must enter into an Agreement for Independent Contractor Services.

5.2. The contract period will be from approval of the contract for twelve (12) months with the potential for future extensions depending on Home Retrofit Program funding and contractor performance at the discretion of TSI.

5.3. Contract will not hold TSI or WECC or Duke Energy liable for any and all work completed by contractor.

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6. Preparing and Submitting a Proposal

6.1. If delivered in person or by courier, contractor must submit an original and 3 copies of all materials required for acceptance of their proposal by 2:00 pm EST July 9, 2010 to:

Chris Maher
Thermo-Scan Inspections
4650 Killarney Dr.
Bridgewater Corporate Village
Carmel, IN 46033

If delivered by fax or email contractor must submit one copy by the deadline, then courier or mail one original copy within three (3) business days.

Fax Number: 317-846-4672

Email address: info@thermo-scan.com

Proposal must be received in the above office by July 9, 2010, 2:00 P.M. EST. Any proposal received after the deadline will be returned unopened.

TSI will not reimburse contractors for any expense associated with the preparation of a proposal. Proposals will be evaluated on the basis of the Proposal Scoring evaluation criteria sections 4.3.1 above. TSI may select one or more contractors but reserves the right to not select any contractors and to negotiate with selected contractors. Lengthy proposals are discouraged and proposals are limited to ten (10) pages.

6.2. Questions regarding this solicitation must be made in writing and submitted by **noon EST, June 29, 2010** to the address listed above in 6.1, or may be emailed to cmaher@thermo-scan.com. **No questions delivered in any other fashion will be answered.** All questions and answers to the questions will be posted to the website at www.thermo-scan.com, current RFP's.

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PROPOSAL COVER SHEET

Date: _____

Name of Company: _____

Address: _____

City/State/Zip: _____

Primary Contact: _____

Address: _____

City/State/Zip: _____

Telephone: _____

Fax Number: _____

Email Address: _____

Signature of Qualified Individual: _____

Title: _____

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PROPOSAL COVER SHEET - PRICING
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Name of Company: _____

Please check each county that Contractor proposes to conduct work activities:

- Cherokee
- Greenville
- Spartanburg
- Union
- York (Western area)

Description

Unit Price

(Include time and material)

Building Shell Measures

- 1) Crew deployment, equipment set-up, pre and post blower door test. _____ per job
- 2) Existing attic ceiling access: Insulate panel with 4" closed cell foam (R-20) and weather strip. _____ each
- 3) Existing attic ceiling access with damaged or missing panel: Replace with 5/8" primed sheet rock panel, insulate panel with 4" closed cell foam (R-20) and weather strip. _____ each
- 4) No attic ceiling access: Create a framed in opening with stop and trim to match surrounding trim. Install 5/8" primed sheet rock panel, insulate panel with 4" closed cell foam (R-20) and weather strip. _____ each
- 5) Existing attic knee wall access: Insulate panel with 4" closed cell foam (R-20) and weather-strip. Provide mechanical fastener with stops as needed to keep panel closed. _____ each
- 6) Existing attic knee wall access with damaged or missing panel: Replace with 3/4" primed plywood panel, insulate panel with 4" closed cell foam (R-20) and weather strip. Provide mechanical fastener with stops as needed to keep panel closed. _____ each

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- 7) No attic knee wall access: Create a knee wall access opening to gain access to attic areas.
Re-seal the opening closed after the attic has been treated with new or existing sheet rock,
finish and prime to paint ready condition. _____ each
- 8) Pull down stair attic access: Install pre-manufactured insulated cover from inside. _____ each
- 9) Whole house fan: Install airtight cover from inside. _____ each
- 10) Attic preparation for insulation: Install 10" tall by 3/4" solid wood blocking around perimeter of
attic access, install two rulers in attic to measure finished insulation depth, upgrade up to two
electric junction boxes, assist client in removing up to ten items or boxes from attic, basic
attic penetration air sealing (masonry/metal chimney gap, soil stacks/vent pipes, typical
electrical/cable penetrations through top plates, register boots and exhaust fan housings).
 - A. First attic _____ each
 - B. Add'l attics _____ each
- 11) Install ventilation baffles that attach to top plate. _____ each
- 12) Attic open joist cellulose insulation: Final installed level to be minimum R-38.
 - A. Add R-13 _____ SF
 - B. Add R-19 _____ SF
 - C. Add R-25 _____ SF
 - D. Add R-30 _____ SF
 - E. Add R-38 _____ SF
- 13) Attic closed joist dense pack insulation.
 - A. Add R-13 _____ SF
 - B. Add R-19 _____ SF
 - C. Add R-25 _____ SF
 - D. Add R-30 _____ SF
- 14) Dense pack attic sloped ceiling.
 - A. Add R-13 _____ SF
 - B. Add R-19 _____ SF
- 15) Attic knee wall insulation dense pack with netting. _____ SF
- 16) Block and seal floor joist under attic knee wall. _____ each

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- 17) Dense pack under cantilever or bump out. _____SF
- 18) Remove and dispose of existing crawl space poly. _____per job
- 19) Install 6 mil poly on crawl floor and overlap seams. _____SF
- 20) Remove and dispose of existing floor insulation. _____per job
- 21) Insulate with R-19 Kraft-faced batt and mechanically attach to floor above crawl space with batt hangers. Kraft facing must be in contact with sub-floor. _____SF
- 22) Air seal floor above crawl space (register boots to subfloor, plumbing and electrical penetrations, Balloon framing, tub drain access, etc...) _____per hour

Ventilation and Mechanical System Measures

- 23) Extend dryer vent from attic through roof or gable end (or basement through rim joist) with UL and local code approved insulated duct. _____each
- 24) Extend bathroom vent from attic through roof or gable end wall with UL and local code approved insulated duct. _____each
- 25) Extend kitchen exhaust vent from attic through roof or gable end wall with UL and local code approved insulated duct.
- 26) Extend sump pump drain line to exterior per local code. _____each
- 27) Install roof vent (.50 SF minimum net free area). _____each
- 28) Seal with mastic all ductwork connections outside conditioned space. _____per
Confirm sealing with pressure pan. _____
- 29) Insulate supply/return ducts in uninsulated spaces with R-8 duct insulation. _____LF
- 30) Insulate rectangular supply/return ducts in uninsulated spaces with R-8 duct insulation. _____LF

Air Sealing Measures

- 31) Install weather strip exterior door. _____ each
- 32) Install door sweep exterior door. _____ each
- 33) Box-in and seal from attic recessed light with approved material. _____ each
- 34) Block and seal from attic dropped soffit/bulkhead. _____ each
- 35) Seal wall top plate and drywall gap in attic with foam, fire rated per local code. _____ LF
- 36) Additional blower door directed air sealing. _____ per hour

Other Measures

- 37) Complete Combustion Safety Testing before and after retrofit work in accordance to The Building Performance Institute (BPI) protocols. _____ per job

NOTE:

- 1. Contractor is not required to include a price on all energy efficiency measures. However, the contractor is required to insert an X for those measures they are not pricing.
- 2. Contractor may include alternative pricing and descriptions of other energy efficiency measures that they have found effective in reducing energy use in homes.