

# Request for Proposal: Residential Energy Code Field Study Data Collection Team (Georgia version 1.0)

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Issue Date:	07/08/24
Submission Period:	07/08/2024 – 07/31/2024
Review Period:	08/12/2024 - 08/26/2024
Bidders' Conference:	<a href="#">Link to Register</a>
Period of Performance:	10/01/2024 – 09/30/2025
For more information, please contact:	<a href="mailto:fieldstudy@seealliance.org">fieldstudy@seealliance.org</a>

Submissions must utilize the supplied Budget Template.

To receive updates, please indicate your intent to bid by sending an email to [fieldstudy@seealliance.org](mailto:fieldstudy@seealliance.org).

RFP Questions should be sent to [fieldstudy@seealliance.org](mailto:fieldstudy@seealliance.org). Answers will be posted on the [Residential Energy Code Field Study](#) web site. SEEA staff will not respond to individual questions.

## Section 1.0 Background & Introduction to RFP

### 1.1 Background

The Southeast Energy Efficiency Alliance (SEEA) is a 501(c)3 nonprofit with a mission to optimize the use and impact of energy to enhance the quality of life in the Southeast. To support this goal, SEEA is issuing this Request for Proposals (RFP) as an opportunity to hire a data collection team to aid in the landscape analysis of compliance in new single-family construction across the state.

### 1.2 Introduction to RFP

SEEA, in partnership with stakeholders across Georgia, is conducting a single-family residential building energy code field study using the methodology and tools provided by the U.S. Department of Energy and Pacific Northwest National Laboratory. The intent of the project is to understand where there may be gaps between new construction practices and full compliance with the current residential building energy code and to calculate the impact on energy use and energy costs for Georgia residents. Once the project team has more clarity on where there may be gaps in compliance, stakeholders invested in the codes compliance and the home building industry will help inform the development of training materials and technical assistance. These materials will be used to help close gaps and equip builders, the trades, and code officials with

the skills and resources to comply fully with Georgia building code. Among the intended benefits of pursuing efforts which lead to building code compliance include increased efficiency and resiliency of new single-family homes, reduced residential energy use, and decreased energy costs.

## Section 2.0 Scope of Services

### *2.1 Role of Data Collection Team*

The role of the data collection team is critical to understanding the landscape of compliance in new single-family construction across the state. The data collection team will be responsible for traveling to counties across the state and collecting data at the pre-drywall and final inspection stages. This will include, but is not limited to, conducting building performance tests of duct tightness and envelope leakage. The team will be trained on required data items, protocols, and reporting requirements and be provided a list of energy efficiency measures to check for when visiting homes to measure insulation levels, window characteristics, equipment efficiency and other features impacting energy consumption. The data collection team will be skilled in tasks which align with the duties of a RESNET HERS Rater or BPI Building Analyst Professional. A critical component of the data collection process is to ensure information collected is anonymized and will not reflect on the builder or code official.

SEEA is issuing this RFP to hire one or more Contractors that can provide data collection for new single-family residential construction across Georgia. At a minimum, the field study will require 63 pre-drywall inspections and 63 final inspections, each for unique homes. The scope of work will include the following tasks which must be performed according to SEEA and [DOE](#) methodologies and protocols:

- Task 1: Gather, organize, and submit single-family data to SEEA based on the prescribed data collection protocol and using a spreadsheet template that SEEA will provide. Also, collect and submit photos with time and geolocation data to support spreadsheet data.
  - Collect data in counties across Georgia in accordance with a data sampling plan provided by SEEA (Appendix A).
  - Schedule, coordinate, and complete all required data collection visits within the agreed-upon timeframe.
  - Electronically transmit complete and updated records of every field sample to SEEA every two weeks.
  - Establish and follow an internal quality assurance process approved by SEEA.
  - Based on SEEA's review and feedback, correct, re-enter, modify, or adjust any incorrect or erroneously transmitted data and notify SEEA of the update.
- Task 2: Coordinate with local jurisdictions, homebuilders, and additional stakeholders to identify opportunities for site inspections and build goodwill.

- Collect a list of permitted homes under construction for each jurisdiction to be sampled (Appendix A).
- Provide documentation demonstrating completed contact, outreach, and engagement with homebuilders and other relevant stakeholders in the sampling jurisdictions.
- Ensure documentation collected includes the address of initial contact, any follow-up contact, questions and concerns raised by homebuilders, and responses given.
- Task 3: Provide timely and comprehensive reporting on project activities, milestones, deliverables, challenges, and mitigation strategies.
  - Update SEEA on a jurisdiction-by-jurisdiction basis at least every two weeks on progress toward project milestones and goals. The report will note variances from the plan, obstacles encountered, and plans to overcome and mitigate challenges.
  - As needed, provide SEEA with any information or data required for SEEA to report progress toward milestones to DOE and project partners.
  - At the end of the data collection process, provide a comprehensive written final report describing the overall barriers encountered, strategies and methods that aided in overcoming barriers, the observed trends in data collection, and the results of the data collection efforts.

## **Section 3.0 Confidentiality, Nondisclosure, and Legal**

### *3.1 Definition of Confidential Information*

The Southeast Energy Efficiency Alliance (SEEA) and the Contractor will be exchanging information that is confidential, privileged, and not to be disclosed to third parties. For the purpose of this RFP, “Confidential Information” is defined as:

Information about a party's business that falls under categories such as organizational, structural, personnel, accounting or financial, marketing, strategic planning, survey questions, and results, consulting, independent studies, technical drawings, engineering documentation, project schedule(s), request for proposal (and related documents), and the bidder's response to the request for proposal is considered confidential information.

This includes information exchanged orally, visually, electronically, or in the form of compilations, interpretations, notes, analyses, and summaries. The fact that the parties have been in contact and are considering doing business with each other and any specific terms, conditions, or results of the transaction are also regarded as confidential information for this request for proposal.

### *3.2 General Obligations of Both Parties*

Both parties in possession of this document must keep "Confidential Information" completely confidential. They must take the same care to prevent disclosing this information as they would with their own confidential and proprietary information. This care should be at least the same standard of care required by state and federal laws and regulations for protecting this type of information. If there are no legally required standards, the standard should be that of a reasonable person under the circumstances. Both parties must ensure that their employees, officers, directors, representatives, or agents comply with this confidentiality clause. If necessary, legal action may be taken to enforce it. The term "person" includes any corporation, company, partnership, individual, or other entity.

### *3.3 Rights to Submitted Material*

All proposals, responses, inquiries, or correspondence relating to or in reference to this RFP and all reports, charts, photos, data, or other documentation submitted by the Contractor shall become the property of SEEA upon submission. Any confidential data the Contractor wishes to remain confidential shall be clearly marked as such.

### *3.4 Right of Rejection and Clarification*

SEEA reserves the right to reject any and all proposals. SEEA can request clarification of any information from any proposer. SEEA is not obligated to enter a contract based upon issuing a request for a proposal or requesting clarification from a proposer.

### *3.5 Independent Contractor*

The relationship between SEEA and the Contractor is that of an independent contractor. Under no circumstances will the Contractor, its employees, subcontractors, agents, or any of the Contractor's staff hold itself out to be considered an employee, agent, and/or partner of SEEA.

### *3.6 Conflict of Interest*

The Contractor covenants that they presently have no interest, and do not anticipate acquiring any interest, directly or indirectly, which would conflict, or appear to conflict, in any manner or degree with the performance of the services hereunder. Should such an interest arise after the RFP submission, the Contractor shall immediately notify SEEA in writing and fully describe the conflict of interest or apparent conflict of interest and its potential impact on the project. The Contractor further covenants that no person having any such known interest shall be employed, directly or indirectly, in the contract.

### *3.7 Indemnification*

To the fullest extent permitted by laws and regulations, the Contractor shall defend, indemnify, and hold harmless SEEA, its affiliates, directors, officers, and employees from and against all

claims, demands, losses, damages, liabilities, obligations, and attorneys’ other professional fees and expenses arising out of or relating to the goods/and or services delivered or performed by the Contractor in regards to this RFP.

*3.8 Compliance with Local, State, and Federal Laws*

As part of the work performed under the contract, the Contractor agrees to adhere to the Fair Labor Standard Act, Equal Opportunity Act, and all relevant Federal and State laws, regulations, and executive orders that apply. Furthermore, the Contractor must include this provision in all subcontracts awarded as part of this contract.

**Section 4.0 Instructions**

*4.1 Submission Instructions*

The completed original proposal must be submitted in a single email that contains a single file in PDF format containing items 1-4, below, and a project budget using the supplied budget template in Excel format. The submission must be emailed to [fieldstudy@seealliance.org](mailto:fieldstudy@seealliance.org) by the submission deadline. Submissions must include the subject *Request for Proposal Georgia Data Collection Team*.

Applicants must include all documentation outlined in Section 5 in their submission to the RFP. The proposal should include the following sections:

PROPOSAL SECTIONS
1. Cover Page
2. Declaration of Qualifications
3. Statements of Qualifications
4. Letters of Partnership
5. Budget

*4.2 Project Schedule*

RFPs will be accepted until the date and time listed on Page 1 of this RFP. The intent is for data collection to begin in Q4 of 2024. SEEA will not accept late proposals.

*4.3 Evaluation Criteria*

As outlined in Section 6, submissions will be scored based on best value. The criteria will include team qualifications, demonstration of ability to complete tasks and deliverables with high-quality work, the quality and comprehensiveness of the submission, cost, and leadership or partnership

with women or minority-led businesses. Applicants are expected to use the linked budget spreadsheet to fill in the expected costs.

#### *4.4 Exceptions to the RFP*

If the applicant cannot fully meet all the requirements of the RFP or deliver on all aspects of the Scope of Work outlined below, the exceptions need to be made explicit in the response to the RFP. The written explanation of the exceptions must include a full description of the applicant's limitation to provide services or meet certain criteria of the RFP and how this could impact SEEA's work in Georgia.

## **Section 5.0 RFP Response Materials**

### *5.1 Cover Page*

The information included on the cover page should include the name of the organization submitting a response to this RFP, the name, email address, phone number and signature of the primary contact, and the full address of the organization. The cover page should also list any teaming organizations and the name and email address of the primary point(s) of contact.

### *5.2 Declaration of Qualifications*

By submitting a Declaration of Qualifications, the applicant signals that they have read the RFP requirements and are prepared to deliver on all project tasks as a sole organization or team with multiple organizations. If the applicant is awarded the contract and role of data collection team, the applicant will align with SEEA on proposed costs of labor, supplies, travel, and any additional costs associated with the project tasks.

The primary contact should explicitly state in the Declaration of Qualifications on company letterhead that, "By submitting this Request for Proposal: Data Collection Team, I, [name], certify that our organization(s) are fully capable of accomplishing the tasks outlined in the scope of work."

### *5.3 Statement of Qualifications*

Describe the Contractor's qualifications to complete the Scope of Work outlined in this RFP in a Statement of Qualifications. If the proposer consists of a team, qualifications of all team members should be included.

1. Provide a summary of your team structure and management.
  - 1.1. Full legal name(s) of the organization(s) contributing to the Scope of Services
  - 1.2. Addresses of organization(s)

- 1.3. Company organization type(s) (e.g., minority-led or owned businesses or MBEs/MBWs, B-corp, non-profit) Please include documentation, if applicable.
- 1.4. List and description of subsidiary organizations
- 1.5. Number of years the company(s) has been in business under its current name and structure
- 1.6. If the proposer is a team of more than one organization, describe how the various organizations will be managed under this scope of services.
- 1.7. If there is the chance of real or perceived conflict of interest for you performing this scope of services, describe how you will mitigate this conflict.
2. Describe how your team is qualified to perform the scope of services described herein.
  - 2.1. Number of years the company has engaged in residential energy efficiency, and in what capacities
  - 2.2. Total number of employees, including full and part-time
  - 2.3. List of professional organizations and associations with which the organization is affiliated
  - 2.4. For each employee who will be key personnel on this project, provide their name, a description of relevant experience, education, training, and certifications. Resumes may be submitted.
  - 2.5. Describe experience collecting building field data, implementing quality assurance processes, and documenting work.
3. Provide a plan describing how your team will collect field data across the state according to the required methodology and sample plan.
  - 3.1. Demonstration of familiarity with single-family residential new construction in Georgia
  - 3.2. Familiarity with the Georgia Residential Energy Code
  - 3.3. Describe how the organization(s) will efficiently collect data from counties across the state
  - 3.4. Describe internal quality assurance procedures including access to calibrated blower door and duct leakage test equipment
4. Describe any prior experience that has prepared your team to be successful in this project.
  - 4.1. A list of similar work the companies have managed during the past 5 years, including date of contract, name of project, location of project, company's scope of work, and any other relevant information
5. Provide three professional references, including contact information

6. Provide a Statement of Capacity to successfully complete work in a timely and professional manner given the company’s current workload
7. State any experience working or partnering with minority or women-led organizations
8. State any other qualifications that SEEA should take into consideration

*5.4 Teaming Documentation*

Proposers who represent teams of more than one organization must submit Letters of Commitment from each organization indicating their willingness to partner with the lead organization and their specific role on the team. In addition, each teaming organization must submit an individual Statement of Qualifications, as described above.

*5.5 Budget Template*

Please use the budget template provided. SEEA expects to execute a time and materials contract. For this proposal, create a budget for fulfilling all tasks listed in Section 2.0, including performing 70 pre-drywall inspections and 70 final inspections with performance testing in the jurisdictions in the image provided in Appendix A. Note that respondents are asked to budget for 70 inspections because it often requires more than one home visit to collect the necessary data. The budget should not exceed \$150,000.

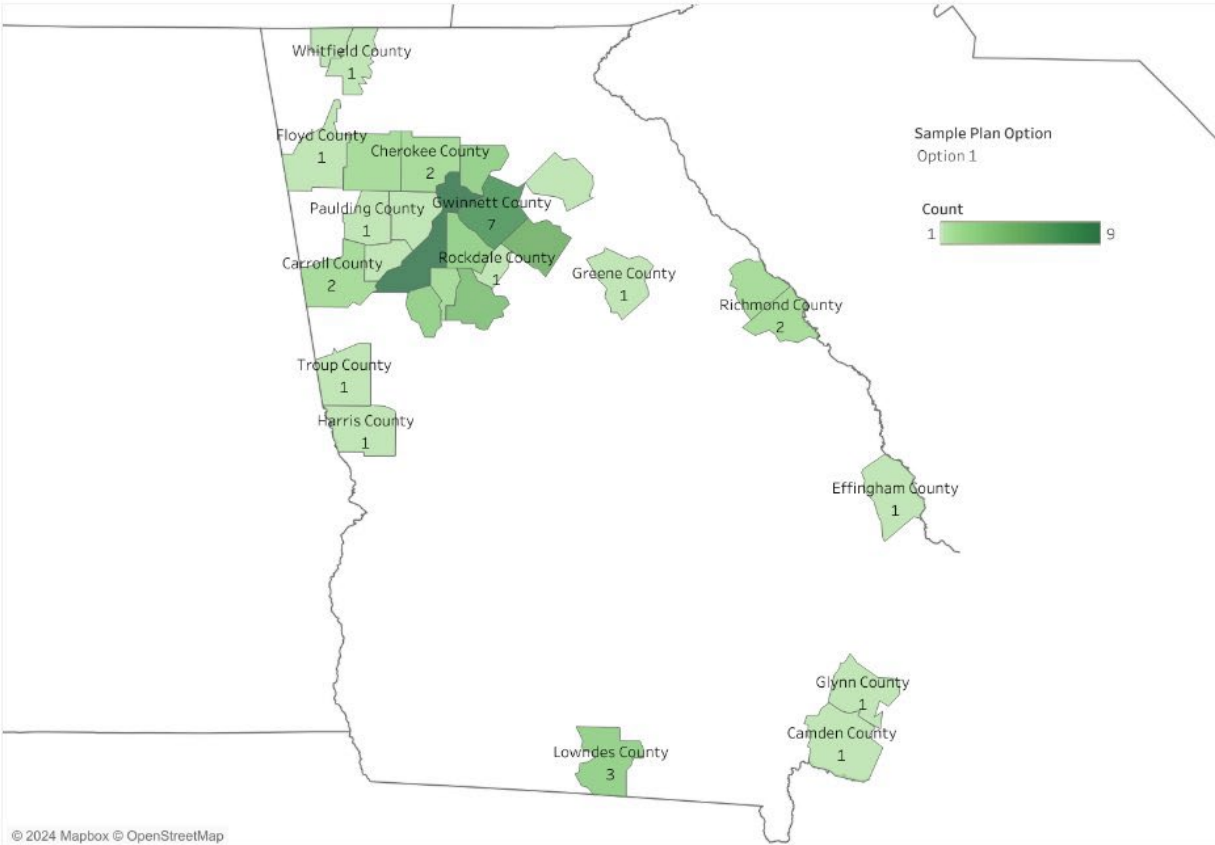
**Section 6.0 RFP Scoring Criteria**

Scoring Criteria	Points
1. Team Structure and Management Plan	10
2. Team and personnel qualifications	20
3. Data collection plan	20
4. Prior experience and references	20
4. Budget	10
5. Leadership and/or Partnership with Women or Minority-Owned or Led Organizations	20



## Appendix A

### GA Sample Plans: Option 1



Sampling Plan: Minimum Number of Samples per County	
BARTOW	2
CAMDEN	1
CARROLL	2
CATOOSA	1
CHEROKEE	2
CLAYTON	2
COBB	1
COLUMBIA	2
DEKALB	3
DOUGLAS	1
EFFINGHAM	1

FAYETTE	3
FLOYD	1
FORSYTH	3
FULTON	9
GLYNN	1
GREENE	1
GWINNETT	7
HARRIS	1
HENRY	4
JACKSON	1
LOWNDES	3
PAULDING	1
RICHMOND	2
ROCKDALE	1
TROUP	1
WALTON	5
WHITFIELD	1