



## REQUEST FOR QUALIFICATIONS (RFQ)

### Lighting Installers for Small and Medium Business Direct Install (SMBDI) Lighting Program

*Para asistencia o preguntas en Español, por favor mande un correo electronico a [lighting@energytrust.org](mailto:lighting@energytrust.org) con el tema “SMBDI Lighting Installer RFQ”*

#### 1. Purpose

The purpose of this Request for Qualifications (RFQ) is to provide CLEAResult with a pool of qualified lighting installation contractors to deliver the Energy Trust of Oregon, Inc. Business Lighting program's Small and Medium Business Direct Install (SMBDI) Lighting services to eligible customers.

#### 2. Overview

Energy Trust is an independent nonprofit organization dedicated to energy efficiency and renewable power development.

CLEAResult is the program delivery contractor responsible for providing Energy Trust's Business Lighting program services and incentives to customers of Portland General Electric and Pacific Power in Oregon. The program will provide no-cost lighting upgrades to eligible small and medium commercial and industrial businesses.

CLEAResult is requesting qualifications, including a quote, from lighting installation contractors throughout the state of Oregon who are interested in participating in this program. Selected installers will be contracted with CLEAResult to:

- Install approved lighting and lighting controls measures listed in the application's (See Section 6 below) pricing section.
- Work with CLEAResult's outreach team for the SMBDI program, which will provide the installation contractors with audited and qualified projects from eligible customers that have agreed to participate in the program.
- Coordinate with CLEAResult's local distribution partner for material delivery to be installed at the customer's site

The cost for the fixed agreed-upon installation costs will be paid out to the contractor by the program implementer, CLEAResult.

#### 3. RFQ Schedule and Contact

It is anticipated that CLEAResult will enter into a written contract with a limited number of initial respondents through the RFQ process shortly after CLEAResult makes their selection. It is not expected that all Respondent submissions will be selected for written contracting. For selected respondents, contracts will have a term ending December 31, 2021.

CLEAResult is looking to select an initial program launch pool of qualified candidates that will start working in the SMBDI Lighting Program beginning in May 2021, however applications may be accepted on an ongoing basis throughout the 2021 Program Year to maximize opportunities for COBID-eligible contractors and to ensure that the Program has the necessary resource to meet its goals and efficiently serve the needs of eligible OR customers.

Initial application submissions to be considered as a program launch contractor are due by **April 14<sup>th</sup>**. CLEAResult will initiate contract negotiations with selected respondents with a goal of finalizing contracts to begin installations on or after May 8, 2021.

**CLEAResult will host a mandatory webinar on March 24<sup>th</sup> at 3:00PM** to go over the details of this RFQ and answer any questions you may have. To register for this Q&A session, please follow this [link](#).

RFQ Released	March 17, 2021
RFQ Webinar (Mandatory; See Link Above)	March 24, 2021
RFQ questions submittal deadline	March 31,2021
RFQ answers supplied by CLEAResult	April 5, 2021
RFQ Responses due to CLEAResult	April 14 <sup>th</sup> , 2021
Interviews	Starting the week of April 19th
Awards Notice	Week of April 26th
Contracting/Onboarding	Initiates immediately after awards notice
Installations Begin	Target date of May 8, 2021

All submissions and questions, must be emailed to Tim Telfer at [lighting@energytrust.org](mailto:lighting@energytrust.org) with the subject line “SMBDI Lighting Installers RFQ”.

#### **4. Participating Contractor Required and Preferred Qualifications**

Required Qualifications:

- Registered Energy Trust Business Lighting trade ally or contractor capable of meeting Energy Trust's requirements to become an enrolled Business Lighting trade ally by the time the offer is in the market. For non-registered trade allies, you may complete the application for becoming a trade ally during the final contracting process with CLEAResult.
- Relevant business and electrical licenses for performing lighting retrofit work
- Experience installing lighting equipment in retrofit applications
- Oregon Certification Office of Business Inclusion and Diversity (COBID) certified or COBID eligible business

Preferred Qualifications

- Active trade ally in the current Energy Trust of Oregon Business Lighting program

- Multi-lingual staff

## 5. Description of Work

This section describes the roles and responsibilities of CLEAResult and the selected, participating installation contractors. FCI Management has been contracted with CLEAResult to perform outreach and program management services for this program.

CLEAResult/FCI Management roles and responsibilities:

- Perform all sales and outreach activities, provide installation contractors qualified projects ready for installation within that installation contractor's identified territory;
- Provide an electronic (PDF) copy of the individual work order documentation to the installation contractor via email;
- Ensure that the lighting materials specified in the application's pricing section is readily available via a local distribution partner. CLEAResult will provide all necessary lighting equipment and supplies through a local distribution partner. The installation contractor is not responsible for paying for specified lighting equipment and supplies (see below for more information).

### Installation contractor role and responsibilities

The selected contractors will be responsible for abiding by program participation requirements. The general scope is limited to the installation of a specific set of lighting and lighting controls equipment listed in the application's pricing section at prequalified/audited facilities that will be provided to the contractor. Specific contractor requirements related to this RFQ include:

- Material and other costs:
  - Incidental materials, required to complete the installation of the lamps, fixtures and ballasts provided, must be provided by contractor. This includes materials such as wire, conduit, hangers and tombstones, which should be accounted for in the measure installation prices provided with the RFQ application response.
  - Additional costs including aerial lifts, permits and recycling will be the responsibility of the installation contractor and invoiced separately to CLEAResult, but estimates of these should also be provided with the RFQ application response.
- Scheduling:
  - Contractor will:
    - schedule the installation of the project with the customer,
    - coordinate the delivery or pickup of materials for the job with the selected local distributor partner, and
    - manage the rental and delivery of any necessary aerial lifts required to complete the job.
- Installation:
  - Contractor will be required to complete all work in compliance with all local or national electrical codes, laws and requirements including, but not limited to:
    - Obtaining required permits
    - Recycling any required material from the jobsite
  - General cleanliness and professionalism on the job site is required
  - Adherence to any Covid related safety regulations

- Work Verification: Systems installed are subject to work quality and accuracy verification inspections by CLEAResult staff.

## 6. Application Submission Requirements

This section describes the requirements for the different parts of the application. To simplify the application process, CLEAResult has created a Microsoft Excel version of the application that is available for download or print at <https://www.energytrust.org/about/explore-energy-trust/rfps-rfqs/>. All applications must be submitted using this template and returned via email to [lighting@energytrust.org](mailto:lighting@energytrust.org) with the subject line “SMBDI Lighting Installers RFQ”. Please note: **RFQ applications are due April 14, 2021.**

## 7. Governing Provisions

All submitted proposals are subject to the following governing provisions:

### A) Agreement to All Terms

By submitting a response to this RFQ, the Respondent represents that it is authorized to submit a response, all information provided in the response is true and correct, and the Respondent explicitly agrees and accepts the following provisions of this RFQ and all other terms and conditions set forth in this RFQ.

### B) Right to Accept or Reject

This RFQ is not an agreement to purchase goods or services. CLEAResult is not bound to enter into a contract to purchase goods or services with any Respondent. CLEAResult reserves the right to modify the terms of this RFP at any time in its sole discretion. This includes the right to cancel this RFQ at any time. Further, CLEAResult reserves the right to waive any nonconformity in submissions received, to accept or reject any or all of the items in the submission and award any ultimate contract in whole or in part as it is deemed in CLEAResult’s best interest.

### C) Ownership of Responses

All materials submitted in response to this RFQ shall become the property of CLEAResult and shall not be returned to the Respondent.

### D) Confidentiality

Respondents shall clearly identify those portions for their responses that they do not want revealed to third parties, other than Energy Trust as the program administrator, and shall label such portions as “Confidential Information.” Except as required under law or for regulatory purposes, CLEAResult will maintain confidentiality of such information.

### E) Respondent Expenses and Waiver of Claims

Respondents are solely responsible for their own expenses in preparing a response and for any subsequent negotiations. CLEAResult will not be liable to any Respondent for any claims, whether for costs or damages incurred by the Respondent in preparing the response, loss of anticipated profit in connection with any final contract or any other matter whatsoever.