

# ADDENDUM No. 1

## RFP No. 24-01

### Home Energy Score Assessment Services

**Due: January 30, 2024 by 3:00 P.M. (local time)**

The information contained herein shall take precedence over the original documents and all previous addenda (if any) and is appended thereto. **This Addendum includes five (5) pages.**

**The Proposer is to acknowledge receipt of this Addendum No. 1, including all attachments in its Proposal by so indicating in the proposal that the addendum has been received. Proposals submitted without acknowledgement of receipt of this addendum may be considered non-conforming.**

The following forms provided within the RFP Document should be included in submitted proposal:

- Attachment B – Legal Status of Offeror
- Attachment C - City of Ann Arbor Declaration of Compliance Non-Discrimination
- Attachment D - City of Ann Arbor Living Wage Declaration of Compliance
- Attachment E - Vendor Conflict of Interest Disclosure Form of the RFP Document

**Proposals that fail to provide these completed forms listed above upon proposal opening may be rejected as non-responsive and may not be considered for award.**

#### I. QUESTIONS AND ANSWERS

The following Questions have been received by the City. Responses are being provided in accordance with the terms of the RFP. Respondents are directed to take note in its review of the documents of the following questions and City responses as they affect work or details in other areas not specifically referenced here.

Question 1: Is there a preferred version of the HES to be used? Are there any additional assessments or components beyond the standard HES required?

Answer 1: HES Assessor will use the DOE's web-based tool (<https://hescore.labworks.org/>) as provided to them from City of Ann Arbor Office of Sustainability and Innovations (OSI). OSI will provide those selected a unique User ID and access to the assessment tool. There are no additional components to be collected beyond those needed for an HES at this time.

Question 2: What types of properties (single-family, multi-family, etc.) are included in the scope of work? Are there any geographic limitations within Ann Arbor?

Answer 2: Assessments will be performed on existing single-family and side-by-side town homes that are to be listed for public sale solely within the city limits of Ann Arbor.

Question 3: What is the timeframe of the contract for this RFP?

Answer 3: The City is seeking these services for a period of twelve months, with the City reserving an option to extend the contract term for up to two additional one-year periods.

- Question 4: What is the timeframe for the HES report?  
Answer 4: The timeframe for delivering each individual HES report to the client and OSI will be 2 business days.
- Question 5: What is the timeframe for the HERD Ordinance?  
Answer 5: The HERD Ordinance goes into effect on March 12, 2024 and has no end date.
- Question 6: What specific information and reports are required from HES Assessors? In what format should these be submitted?  
Answer 6: The deliverable to the client and to OSI will be the digital Home Energy Score Report that is generated directly from the DOE's web-based tool (<https://hescore.labworks.org/>). This can be emailed as a pdf.
- Question 7: Are there any established quality control measures or performance benchmarks for the project? What are the key metrics for evaluating success?  
Answer 7: The Updated Quality Assurance and Mentoring Protocols for Home Energy Score can be found at <http://www.betterbuildingsolutioncenter.energy.gov/home-energy-score>. Customer satisfaction, professional manner of the work completed, timeliness of the delivery of the report, and requisite compliance with quality assurance protocols will be the key metrics for evaluating success. Per DOE requirements, there is a mandatory 5% quality assurance re-score process, which will be conducted by City staff.
- Question 8: Do you have an estimated number of homes requiring HES assessments within the project? Will this volume be spread evenly throughout the project duration, or are there peak periods to anticipate?  
Answer 8: Based on research from 2013 through 2023, we estimate around 1500 homes will require an HES assessment per year. The peak period for home listings is from March to September with the highest volumes being in June and July.
- Our workload will be based on how many of these listings want a free assessment from OSI. DOE certified HES Assessors from other DOE partners are allowed to do the assessments for the purpose of complying with the HERD Ordinance as long they can deliver a DOE Home Energy Score Report that meets the ordinance requirements.
- Question 9: What level of flexibility is expected for scheduling assessments? Are there specific days or times when assessments are preferred?  
Answer 9: At a minimum, the OSI would like to offer assessments Monday through Friday, with times available between 9:00am and 6:00pm. Saturday and weekday evening availability is also being considered
- Question 10: Can you provide information on access procedures for the properties requiring assessments? Are there any potential challenges to be aware of (e.g., tenant occupancy, security)?  
Answer 10: OSI will provide the selected Assessors with our Safety and Customer Service Protocols for Assessors entering client homes. Program procedures, cancellation policies, no-show policies, etc. will be detailed in contract agreement.
- Question 11: Can you share the total budget allocated for this project? Is there a specific budget per assessment or a range to work within?  
Answer 11: OSI will set a price paid per assessment based on the fees submitted by Offerors in the RFP responses.

When offerors are calculating their fees, it is OSI's expectation that pricing will be based on HES Report generation, taking on average 90 minutes.

Question 12: Can you clarify the specific insurance requirements for participating companies? Is the current \$250,000 coverage in various categories sufficient, or are there additional needs?

Answer 12: Per the RFP insurance requirements, requirements are Commercial General Liability with limits not less than \$1,000,000; Workers Compensation and Employers Liability coverage 12 with limits not less than \$500,000 for all employees/owners; Automobile Liability with limits not less than \$1,000,000 per occurrence; and Professional Liability with limits not less than \$1,000,000. Single person Businesses that operate without additional employees are exempt from carrying workers compensation insurance.

Question 13: Are there any alternative insurance options acceptable to the City of Ann Arbor if offeror's cannot meet the minimum requirements?

Answer 13: No

Question 14: When and how should the required insurance certificates be submitted?

Answer 14: A certificate of insurance should be included with submission of qualifications. If selected as an HES Assessor, City of Ann Arbor must be named as additionally insured. Offerors are encouraged to review section 6. Insurance/Indemnification in the Sample Contract provided in the RFP Document for details on insurance.

Question 15: Will contract assessors be involved in any outreach or educational efforts related to the HES program? If so, what might that entail?

Answer 15: No, OSI will be responsible for outreach and educational efforts related to the HERD and HES. We want assessors to be able to concentrate on completing assessments thoroughly and in a timely and efficient manner so the deliverable can get back to the client within timelines.

We do want assessors to be knowledgeable about broader programs and initiatives relevant to the Home Energy Score. Assessors will be provided the information they need to direct client questions to OSI where we will follow-up with requested information.

Question 16: Will the City of Ann Arbor provide any training or support resources to ensure assessors meet all program requirements and assessment standards?

Answer 16: If selected to perform assessments, contractors will be required to join OSI's Home Energy Score Partnership. For Assessors under our partnership, we will provide all training, mentoring, oversight and support necessary to complete assessments in service to the Home Energy Rating Disclosure Ordinance at no cost to the assessor.

Question 17: Homes vary in size and complexity. Is the payment going to be the same for all homes, regardless of size?

Answer 17: Payment per home is dependent on proposed fees submitted by Offerors in the RFP process. Offerors are welcome to delineate specific prices for different conditioned floor areas and the OSI will consider tiered pricing, but final fee arrangements will be specified in final contract and will be non-negotiable upon contract signing.

Question 18: How many days ahead are bookings scheduled?

Answer 18: This will be determined based on market demand and workload throughout the year.

- Question 19: Do I have the right to refuse a booking?  
Answer 19: The OSI is developing policies and procedures regarding cancellations and work refusal and will be outlined in the contract agreement.
- Question 20: Is there a VIA (Visual Inspection Document) that the Seller and Energy Assessor needs to sign to activate insurance?  
Answer 20: The OSI will provide assessors with all documents necessary to conduct a HES Assessment. If there is a need for a VIA, it will be outlined in the contract agreement.
- Question 21: If I agree to conduct HES assessments on the OSI's behalf, will I be allowed to conduct HES assessments outside the City of Ann Arbor?  
Answer 21: Yes, but not using the Assessor ID assigned under the OSI partnership. All Home Energy Scores conducted under the OSI's partnership must originate from the OSI and will be assigned to selected assessors. Assessors may conduct HES assessments outside the city limits if they have an Assessor ID with another partner.
- Question 22: If I agree to conduct HES assessments on the OSI's behalf, will I be allowed to also conduct assessments within city limits for my own company (or my employer)?  
Answer 22: Yes, but only while using a different partner ID and without the support of OSI. Remember, the OSI will only cover the costs of assessments that originate out of the OSI office and are conducted under the OSI partnership
- Question 23: May I conduct HES assessments within city limits using another partner ID?  
Answer 23: Yes, but only while using a different partner ID and without the support of OSI.
- Question 24: So as long as I use the OSI partnership, can I schedule my own assessments within city limits?  
Answer 24: No. Assessors participating in the OSI partnership cannot schedule their own assessments. All OSI Partnership assessments must originate from the OSI and will be assigned to selected assessors.
- Question 25: What if I don't want to conduct HES assessments on the OSI's behalf – will I still be allowed to conduct HES assessments within city limits?  
Answer 25: Yes. The OSI's partnership does not preclude any assessor from conducting their own assessments under a different partnership. All assessors may conduct HES assessments anywhere they want, as long as they have and use an Assessor ID with an outside DOE Partner. The benefits of participating with the OSI's partnership include: access to a reliable, consistent workflow and customer base, free QA checks for all assessments conducted under the OSI partnership, and no costs to the assessor for report generation.
- Question 26: I am self employed with no employees. Can the insurance requirement for Workers Compensation be waived?  
Answer 26: Yes
- Question 27: How soon after the first assessment is completed when will payment for service start?  
Answer 27: City of Ann Arbor will use a net 30 day pay arrangement. Invoices will be paid within 30 days of submittal
- Question 28: After first payment how often is payment? (Weekly, bi-weekly, Monthly)  
Answer 28: City of Ann Arbor will use a net 30 day pay arrangement. Invoices will be paid within 30 days of submittal

Question 29: Do proposal have to be printed using double sided paper.

Answer 29: Per the RFP language proposals should be printed double-sided. This is not mandatory language so if this is not available to offeror then proposal should still be within the 30 sheets/60 sides page limit.

Offerors are responsible for any conclusions that they may draw from the information contained in the Addendum.