



## Request for Qualifications

### Request for Qualifications (RFQ) for a Participating Contractor List for Heat Pump Installation

March 12, 2018

Marin Clean Energy (MCE), a California Joint Powers Authority, is requesting qualifications from interested and qualified contractors for heat pump installation as part of its Low-Income Families and Tenants (LIFT) Program. Qualified contractors will be placed on the MCE Heat Pump Participating Contractors List. LIFT participants will be required to use a contractor off the list when installing heat pumps through the program.

#### I. ABOUT MCE

With offices in San Rafael and Concord, MCE is a Community Choice Aggregation public agency that focuses on reducing energy-related greenhouse gas emissions (GHG) by providing electricity customers with 50-100% renewable energy and groundbreaking energy efficiency, demand response, and energy storage programs. MCE determines the source and cost of the energy and PG&E continues to manage the transmission and distribution of the energy. MCE is a public, not-for-profit joint powers authority. Members of the agency include the County of Marin and its towns and cities, the County of Napa and its towns and cities, unincorporated Contra Costa County and the cities of Richmond, Benicia, El Cerrito, San Pablo, Walnut Creek, Lafayette, Concord, Danville, Martinez, Moraga, Oakley, Pinole, Pittsburg and San Ramon.

#### II. PROJECT BACKGROUND

The California Public Utilities Commission (CPUC) has granted MCE \$3.5 million to conduct a two-year program that will run until October 31, 2019. MCE developed the LIFT Program to better serve income-qualified multifamily properties that are not currently benefiting from other low-income programs. LIFT provides comprehensive services to low-income owners and tenants and supports fuel switching from gas (or propane<sup>1</sup>) to electric heat pumps for cleaner and safer

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<sup>1</sup> Propane replacement is limited to 10% of the heat pumps incentivized through the program.

energy use. LIFT will offer rebates to cover 80-100% of the costs of purchasing and installing heat pumps in eligible units, for both water and space heaters.

Heat pumps represent a promising technology that is not widely deployed. They have the potential to reduce the carbon emissions associated with space and water heating end uses while improving comfort for residents. MCE will be collecting data on the performance of heat pumps installed through LIFT.

### **III. PURPOSE OF THIS RFQ**

MCE seeks to assemble a list of qualified General Contractors from which participants of the LIFT Program must choose for heat pump installation. Contractors and/or firms submitting the required documentation will be added to the MCE Heat Pump Participating Contractors List. Subject to the conditions prescribed by MCE and provided herein, MCE is hereby soliciting qualifications for furnishing contracting services for the heat pump component of the LIFT Program. MCE will add contractors on a continuous basis for the two-year period of the LIFT Program ending October 31, 2019. This list will be shared with other public and private agencies that are encouraging the installation of heat pumps or implementing or planning to implement heat pump programs. No contract is guaranteed by being added to the MCE Heat Pump Participating Contractors List.

In responding to this RFQ, all contractors and/or firms are required to adhere to all of MCE requirements provided herein.

### **IV. PROJECT SPECIFICATON**

The heat pump fuel switching component of the LIFT Program will include the installation of 125 heat pumps. MCE is aiming to serve approximately 215 units with heat pumps over the two-year program. The type of the heat pump will be determined when the project scope is developed for a unit or building.

### **V. RESPONDING TO THE RFQ**

Interested contractors and/or firms must submit the following documents to be placed on the MCE Heat Pump Participating Contractors List:

1. Signed Participating Contractor Obligations & Requirements Under the LIFT Program form (Attachment A)

2. Certificates of Insurance for the following coverages:

Insurance Documentation	
Insurance Policy	Required Program Amounts
Commercial General Liability – for bodily injury, property damage, and personal injury	\$1,000,000 – each occurrence \$2,000,000 – in aggregate
Business Automobile Liability – “any auto” (Company Vehicles)	At least \$1,000,000
Personal Automobile Liability – “any auto” (Personal Vehicles)	At least \$500,000
Worker’s Compensation and Employer’s Liability* – injury or death, each accident	At least \$1,000,000 *Not required for Sole Proprietor

3. Documentation of current California State License Board (CSLB) license
4. (Optional) Voluntary participation in heat pump related trainings and proposed voluntary participation in future heat pump related trainings
5. (Optional) References: Provide three business references that can attest to the organization’s work history and the general quality of work performed.

## VI. TIMELINE

Subject to the General Terms and Conditions below, this RFQ is open from the date of issuance to the end of the LIFT Program, October 31, 2019. Interested contractors and/or firms may submit materials at any point within this timeline.

## VII. EVALUATION CRITERIA

MCE will add a contractor to the MCE Heat Pump Participating Contractors List upon confirming all required documents detailed in Section V have been received, signing Attachment A, and meeting the necessary specifications.

## VIII. KEY DATES, DEADLINES AND SUBMISSION REQUIREMENTS

1. Submission Requirements: To be added to MCE’s Heat Pump Participating Contractors List, all materials from Section V must be submitted via email, in either pdf or docx (Word) file format to:

MCE Contracts Manager  
contracts@mcecleanenergy.org

2. Rolling Submission Deadline: Subject to the General Terms and Conditions below, MCE is accepting submissions from the date this RFQ is issued until October 31, 2019.

## **IX. GENERAL TERMS AND CONDITIONS**

1. MCE's Reserved Rights: MCE may, at its sole discretion: withdraw this Request for Qualifications at any time, and/or reject any or all materials submitted. Respondents are solely responsible for any costs or expenses incurred in connection with the preparation and submittal of the materials for this RFQ.
2. Public Records: All documents submitted in response to this Request will become the property of MCE upon submittal and will be subject to the provisions of the California Public Records Act and any other applicable disclosure laws.
3. No Guarantee of Contract: MCE makes no guarantee that a contractor and/ or firm added to the MCE Heat Pump Installation Participating Contractors List will result in a contract for heat pump installation. Contracts will be entered into by the LIFT participant and selecting a contractor is at the discretion of the LIFT participant.

## ATTACHMENT A:

### Participating Contractor Obligations & Requirements Under the LIFT Program:

In order to become a Participating Contractor in the LIFT Program for heat pump installation, contractors and/or firms are required to demonstrate an understanding of the program rules, expectations, project process, and obligations under the LIFT Program. The contractor may satisfy this requirement by reviewing and initialing each of the items listed below.

Please initial the following statements related to the obligations and requirements of a Participating Contractor under the LIFT Program.

#### Participating Contractor's obligations before heat pump installation:

- \_\_\_\_\_ Maintain license and insurance documentation, as required by the LIFT Program. (See Section V of MCE's Request for Qualifications for a Participating Contractor List for Heat Pump Installation).
- \_\_\_\_\_ Develop a construction schedule for the participating property and provide to LIFT participant or MCE's Technical Assistance Provider (TAP) to submit to MCE.
- \_\_\_\_\_ Coordinate schedule work with MCE's EM&V partner for the EM&V partner to perform spot measurement and install the sub-metering equipment on the existing equipment prior to its (the existing equipment) decommission and removal.
- \_\_\_\_\_ Attend on-site pre-bid and pre-construction meetings.
- \_\_\_\_\_ Follow all permitting requirements of a local jurisdiction.
- \_\_\_\_\_ Participating Contractor's contracts with the LIFT participant must provide a warranty for all labor and materials furnished or performed for the LIFT participant from defects in workmanship for a period of at least twelve (12) months after installation is completed. Warranty period shall commence on the date of LIFT participant's signature on a contractual agreement with the Participating Contractor. During the warranty period, Participating Contractor shall provide replacement materials and the necessary labor (at no additional cost to MCE or the LIFT participant) to replace the defective materials and repair incorrectly operating equipment.
- \_\_\_\_\_ Provide copies of all documents and warranties listed above, including license and insurance documents, warranty to LIFT participant, permits, construction schedule, and any necessary permits, to MCE and/or TAP for review prior to construction.

#### Participating Contractor's obligations during and after heat pump installation:

- \_\_\_\_\_ All installed measures must meet or exceed the requirements as listed in the Minimum Performance Requirements for measure materials and installation, as specified by MCE or TAP. A copy of the Minimum Performance Requirements will be provided to Participating Contractor prior to construction.
- \_\_\_\_\_ All installed measures will be completed in a professional manner, consistent with industry standards, and in conformance with all applicable building codes, zoning laws, local, state, and federal requirements.
- \_\_\_\_\_ Participating Contractor shall be solely responsible for the work of any and all subcontractors.
- \_\_\_\_\_ MCE and/or TAP may conduct quality control inspections during construction/installation and will verify heat pump installation at completion.

- \_\_\_\_\_ When multiple heat pumps will be installed for a property, Participating Contractor will install one heat pump and receive program installation approval by MCE and/or TAP before installing the remaining heat pumps for the property.
- \_\_\_\_\_ Participating Contractor will safely remove any sub-metering equipment, recording the date and time of removal, and coordinate with MCE's EM&V partner to return the sub-metering equipment, either at the site, or at MCE's office, or another aggregable alternative.
- \_\_\_\_\_ Participating Contractor will inform the site contacts (property owners/managers/residents) that MCE's EM&V partner will be returning at a later date to collect the equipment.
- \_\_\_\_\_ Participating Contractor shall complete MCE LIFT Program study questionnaire after completion of project.
- \_\_\_\_\_ Participating Contractor understands that a LIFT incentive will not be issued to the LIFT participant, or Participating Contractor as applicable, until the installed measure(s) have been verified and approved by MCE and/or TAP. If it is determined that the Minimum Performance Requirements for a measure were not followed, the LIFT participant or Participating Contractor as applicable, will not receive the LIFT incentive until installation issues have been addressed by Participating Contractor. Work needed to bring a measure up to the Minimum Performance Requirements will be done at no additional cost.
- \_\_\_\_\_ Provide MCE with line item pricing for MCE LIFT Program reporting.
- \_\_\_\_\_ Provide MCE with proof of permit closure upon completion of project.
- \_\_\_\_\_ Maintain accurate business records relating to the installation of measures according to customary industry practice for at least three (3) years following installation. Business records must be made available for verification by MCE if requested.

By signing below, Participating Contractor certifies it has:

1. Read and agreed to all of the requirements stated above for the LIFT Program and understands Participating Contractor's obligations and requirements under LIFT for heat pump installation.
2. Submitted all documents and materials required under Section V of MCE's Request for Qualifications for a Participating Contractor List for Heat Pump Installation and those materials are accurate to the best of Participating Contractor's knowledge.
3. No knowledge of any unresolved or outstanding complaints before the California State Department of Labor, Licensing and Regulation or a pattern of outstanding litigation that involves its work.

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Participating Contractor Signature

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Date