

5. SECTION B – SCOPE OF SERVICES

5.1. Background

Montgomery County Department of Housing and Community Affairs (DHCA) is soliciting proposals to operate a program to provide energy efficiency and electrification improvements to low-income owner-occupied homes in the County with an emphasis on elderly homeowners. The program will require conducting outreach to eligible clients, processing and approving applications, making referrals as required, conducting a field visit to approved applicants to prepare a scope of work, arranging installation activities with an installation contractor (to be provided by DHCA), inspecting the completed work, and arranging for payment to the contractor, as well as other reporting and record keeping activities, as further described below.

5.2. Intent

The Efficient Electric Appliance program will be funded for a two-year period and will have two components. One component is for the Efficient Electric Appliance Operations Program (EEAOP) (this RFP) which will administer the activities. The other component is for Efficient Electric Appliance Installation Services (EEAIS) which will provide the actual installation services for these improvements, and will be covered under a separate solicitation.

The total program budget for the two-year period (subject to availability of funding) for the EEAOP contract is approximately \$132,000.0000 and is separate from the funding for the EEAIS.

Efficient Electric activities will vary widely based on individual home needs and the total cost is expected to range from \$5,000 to \$ 50,000 per house. It is anticipated that approximately 25-40 homes will be completed over the two-year period.

The selected Contractor will be conducting outreach for, and administration of, the Efficient Electric Appliance Program as further described below and will make referrals as needed for repairs that may be required outside the scope of this contract. The Contractor will be compensated based on the rate negotiated and incorporated into the resultant Contract.

5.3. Scope of Services/Specifications/Work Statement

The Contractor must:

- a. Conduct outreach activities as needed to ensure full expenditure of allocated funding during the Contract Term(s).
- b. Provide applications to, and review responses from, applicants.
- c. Verify and document income, ownership, and other eligibility criteria and approve eligible applicants.
- d. Conduct a limited home inspection for all eligible applicants using a checklist provided by DHCA and produce and provide a home-specific Scope of Work to the EEAIS contractor. If an element on the inspection checklist is not present in the home (e.g., furnace, appliance), the item will not generally be replaced. However, its absence must be noted on the inspection checklist. If an attic is inaccessible to inspect the condition of the insulation, the inaccessibility must be noted on the home inspection checklist.
- e. Where applicable, include retrofitting or replacing of fossil fuel appliance with an electric-powered system or equipment; including but not limited to, high-efficiency heat pumps, electric heat pump water heaters, electric dryers, and/or induction and electric ranges / cooktops.

- f. Identify any housing code violations or other issues which may indicate conditions which could pose a hazard to health or safety during the inspection and contact DHCA within 24 hours to report these violations/hazards/conditions.
- g. For each project, after conducting the limited home inspection, submit a copy of the application, a copy of the inspection checklist and photographs of each of the elements recommended for replacement to DHCA, for review and approval.
- h. Refer eligible applicants needing additional life-safety or code related repairs, in addition to efficient electric related activities to appropriate program(s). If additional repairs must be completed prior to the energy efficiency modifications, such as a leaking roof requiring repair before installing attic insulation, DHCA must be notified to make a determination to delay the effected component of the work, or to delay the all the efficient electric upgrades for the property.
- i. Execute agreement with homeowners for work to be done (on documents approved by DHCA).
- j. Execute contract with EEAIS contractor (on documents approved by DHCA), for each approved client.
- k. Assist in resolving any questions or disputes, which may arise between homeowner and contractor, and make additional visits to the home as required.
- l. Inspect and verify quality and quantity of completed work in place by contractor at each property.
- m. Notify DHCA when projects are completed so that DHCA can make confirmatory field visits to representative projects, as may be determined by DHCA.
- n. pull Authorize payments to contractors.
- o. Provide monthly, quarterly, and annual reports to DHCA.
- p. Maintain individual client files for each approved applicant, to include application, eligibility verification, scope of work, and contractor invoice(s).
- q. Maintain complete and accurate financial records and provide access to DHCA for inspection, as may be requested.

5.4. Contractor's Qualifications

At Minimum, the contractor must have the following qualifications:

- a. Corporate good standing in Maryland.
- b. Minimum of five years demonstrated adequate organizational capacity to provide the deliverables under this contract, within time frames indicated.
- c. Experience in successfully conducting outreach to low-income Montgomery County residents, including the elderly and those with Limited English Proficiency (LEP).
- d. Experience in successfully administering public funds in compliance with requirements of such funding sources, as well as with County requirements.
- e. Experience in processing applications from low-income homeowners for eligibility for public funding and in obtaining verifications as required by funding sources.
- f. Experience in evaluating deferred maintenance, housing code, and life-safety deficiencies in single-family homes and
 - i. developing scopes of work for correction of such deficiencies,
 - ii. creating accurate in-house cost estimates, and

- iii. competitive solicitation of contractor proposals for repairs to single-family homes.
 - g. Experience in administering multiple simultaneous contracts, and resolving disputes, between construction contractors and low-income single-family homeowners, including those with LEP.
 - h. Experience with detailed file and document maintenance for individual projects adequate for audit compliance monitoring by public funding entities.
 - i. Experience in providing timely accurate regular reports including summaries of client income, demographics and activity progress.
- 5.5. County's Responsibilities- DHCA will provide the EEAOP Contractor with the applicable income limits and samples of the forms to be used. DHCA will review and process payment requests of the EEAOP Contractor and will conduct inspections of client eligibility files and of the completed homes, as the County deems necessary. DHCA may direct the Contractor to conduct additional or more extensive outreach in various communities based on need.
- 5.6. Reports/Deliverables - The Contractor must provide monthly reports to DHCA indicating monthly outreach efforts, the number of applications received, number approved, number funded, and number of homes completed. DHCA may also require additional client demographics or other information be provided. The Contractor must also provide quarterly reports summarizing activities for each quarter and an annual narrative report describing accomplishments and challenges identified.

6. SECTION C - PERFORMANCE PERIOD

6.1. TERM

The effective date of this Contract begins upon signature by the Director, Office of Procurement and ends after two (2) years. The period in which Contractor must perform all work under the Contract begins on the Contract's effective date and ends after a two (2) year period. Contractor must also perform all work in accordance with time periods stated in the Scope of Work. Before this term for performance ends, the Director at his/her sole option may (but is not required to) renew the term. Contractor's satisfactory performance does not guarantee a renewal of the term. The Director may exercise this option to renew this term one (1) year.

6.2 PRICE ADJUSTMENTS

- 6.2.1. Prices quoted are firm for a period of two (2) years after execution of the contract. Any request for a price adjustment after this two (2) year period is subject to the following:
- 6.2.1.1. Approval or rejection by the Director, Office of Procurement or designee
 - 6.2.1.2. Submission in writing to the Director, Office of Procurement and accompanied by supporting documentation justifying the Contractor's request. A request for any price adjustment may not be approved unless the contractor submits to the County sufficient justification to support that the Contractor's request is based on its net increase in costs in delivering the goods/services under the contract.
 - 6.2.1.3. Submission within sixty (60) days prior to contract expiration date, if the contract is being amended.
 - 6.2.1.4. The County will not approve a price adjustment request that exceeds the amount of the annual percentage change of the Consumer Price Index (CPI) for the twelve-month period immediately prior to the date of the request. The request must be based upon the CPI for all urban consumers issued for the Washington-Arlington-Alexandria, DC-VA-MD-WV Metropolitan area by the United States Department of Labor, Bureau of Labor Statistics for ALL ITEMS.