



# Scope of Work: Energy Efficiency and Electrification Support

## Introduction

The City of Ann Arbor has set the ambitious and essential goal of a just transition to community-wide carbon neutrality by the year 2030 (known as [A<sup>2</sup>ZERO](#)). Guiding this goal is the City's "Living Carbon Neutrality Plan", which includes seven strategies and forty-four actions. Two of the strategies outlined in [A<sup>2</sup>ZERO](#) are strategy 3: improving the efficiency of our homes/businesses/etc., and strategy 2: converting our appliances and vehicles to electric. While scientifically necessary, the City understands that, when viewed as isolated pathways, some actions are not always financially or technically simple, especially for those with lower incomes. Therefore, the City is looking for a consultant to help support the City's policy and programmatic initiatives aimed at ushering in a carbon neutral future in a just fashion.

Below are a series of interconnected tasks the City's Office of Sustainability and Innovations and Community Services Division are seeking consultant support to administer. Organizations interested in bidding on the below scope should submit a proposal, highlighting the firm's qualifications, previous experience, and ability to perform all tasks as outlined. For each Task, the consultant should submit the job title(s) and hourly rate(s) for the individuals that would perform the given task. This will provide the City with the flexibility to increase or decrease work in each area given budget considerations. Note that the City is only interested in firms able to complete all the tasks outlined below and that the City is not looking for a single budget proposal, but hourly rates and staff capable of undertaking each task.

The City anticipates awarding one contract for a three-year period with two optional one-year extensions.

All interested bidders should submit their proposal to the City of Ann Arbor no later than November 4, 2022 at 5pm eastern by sending a PDF proposal, not to exceed 20 pages, including all attachments, to [mstults@a2gov.org](mailto:mstults@a2gov.org) and [ddelacourt@a2gov.org](mailto:ddelacourt@a2gov.org).

## Scope of Work

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### TASK ONE: LOW INCOME SUSTAINABILITY GRANT ADMINISTRATOR

In the summer of 2022, the City launched a Low-income Sustainability Grant (LISG) program to support households making 80% area median income or less with undertaking actions that would improve home comfort, safety, and efficiency. This program will provide up to \$10,000 per eligible household to make upgrades to their dwelling that advance sustainability and health. To implement this program, the Office of Sustainability and Innovations (OSI) is seeking a Consultant to coordinate contractors, ensure required work gets completed and contractors paid, make sure work meets all code requirements, and is done to the satisfaction of the City. More specifically, the City is looking for a consultant to:

#### Serve as the General Contractor

As the General Contractor (GC), the consultant will:

1. Help the City finalize all application materials.
2. Work with the City to promote the program and get residents to apply.
3. Review applications to ensure applicants are qualified under the terms of the program.

4. Coordinate with eligible residents to schedule energy assessments from qualified Michigan Saves approved contractors.
5. Explain the results of the energy assessments to residents and work with residents to determine which improvements should be made to provide the most resident-centered benefit.
6. Provide a list of qualified Michigan Saves contractors that could perform the agreed upon scope of work. Secure resident's interest for which contractors to engage.
7. Coordinate with the resident to schedule all work to be completed with the contractors chosen by the resident.
8. Coordinate with the resident and contractors to ensure job scope is completed, including any permitting requirements and final documents such as workmanship warranties, completion certificates, and device warranties.
9. Coordinate with the resident to schedule follow-up energy assessments.
10. Coordinate with the City to ensure all contractors are paid for the services they provide. Funds will flow from OSI to Consultant who will then distribute the funds to the contractors.

### Create Educational Materials

Many of the upgrades under the LISG program might be unfamiliar to residents (e.g., heat pumps, induction stoves). To help residents understand how to operate their new appliances efficiently and ensure warranties are enforceable, the Consultant will develop educational materials and review those materials with the resident after the appliances/improvements have been installed. Consultant should develop easy to use leave behind materials as well. All materials will be shared with the City and available for use in other City-wide programming.

### Reporting and Accountability

The Consultant will prepare and submit monthly reports to OSI on the work completed, challenges faced, and opportunities for improvement. Reports will also serve as a form of accountability for administering the LISG. Reports must include each of the following for the reporting period and to date:

1. The number of applications received
2. The number of applications approved for funding
3. The amount of funding distributed, broken down by resident
4. A list of upgrades implemented in each home
5. The results of the pre- and post- energy audits
6. Suggestions for improvement

### Lessons Learned Report

OSI plans to ramp up the LISG after this initial time-period, especially if the 2022 Community Climate Action Millage is approved by the public. To better scale up this program, by the end of June 2023, the Consultant will prepare a report of lessons learned and suggestions to best meet the needs of the participating residents.

### Timeline for Low Income Sustainability Grant Program

The initial pilot of the LISG program will be from November 2022 – June 2023. For this pilot period the City has \$300,000 to disperse and all funds must be distributed by June 30, 2023.

If the program is successful, and the 2022 Community Climate Action Millage is approved by the public, there will be an opportunity for both massive growth and expansion of this service.

## TASK TWO: DESIGN, TRAIN, AND HELP ADMINISTER THE CITY'S RESIDENTIAL DECARBONIZATION ASSESSMENT

For nearly two years, the City has been working with Community Action Network and the residents of the Bryant neighborhood to design the nation's first carbon neutral, existing low-income neighborhood. This program has seen modest success, but dedicated attention is needed if the program is to achieve its ultimate objective. In particular, the City and partners have secured funding to create and test a resident-designed energy assessment in multiple homes in the neighborhood. This assessment is proving valuable for Bryant but could be useful across the entire City. As such, the City is seeking a consultant to take the work done to-date in Bryant and turn the technical assessment methodology created into a holistic assessment that any homeowner or renter in Ann Arbor could use (with or without the assistance of a technical energy assessor) to understand the actions they can take to reduce their energy usage, improve comfort, and enhance safety within their homes. This assessment must include energy waste reduction opportunities, beneficial electrification opportunities, onsite solar and storage potential, air quality assessments, onsite stormwater management potential, and any other assessments necessary to create a roadmap for how the residential unit could become carbon neutral. The final assessment must also include details about potential actions, the costs, the incentives or rebate programs available, and a proposed timeline for making improvements. More specifically, the City is seeking a Consultant to:

### Create an A<sup>2</sup>ZERO Home Decarbonization Assessment

The selected Consultant will be responsible for taking all methodologies and feedback on methodologies collected to-date and compiling them into a single A<sup>2</sup>ZERO Home Decarbonization Assessment. This assessment must have at least two versions:

1. A simple version that any resident can administer on their own; and
2. A detailed version that a qualified energy assessor can administer

The assessment must include information on energy efficiency opportunities, beneficial electrification opportunities, onsite solar and storage potential, onsite stormwater management opportunities, and solutions to improve indoor air quality. Where onsite opportunities do not exist, the Consultant must recommend offsite programs to help lower the resident's footprint.

The final A<sup>2</sup>ZERO Home Decarbonization Assessment must also include information on the cost of potential improvements, rebates and incentives available to support potential improvements, and a recommended timeline for making improvements based on the urgency, financial viability, and health concerns found during the A<sup>2</sup>ZERO Home Decarbonization Assessment.

### Train Energy Contractors and City Staff on the A<sup>2</sup>ZERO Home Decarbonization Assessment

The selected Consultant must create a training program (virtual, in person, or both) and conduct at least biannual training for local energy assessors and City staff on the A<sup>2</sup>ZERO Home Decarbonization Assessment. The training must be engaging and the content of the training capable of lasting for multiple years with only modest updates. All final training materials must be shared with the City of Ann Arbor. Additionally, training materials must be shared with Michigan Saves and through the Michigan Catalyst Communities program.

### Create Educational Materials about the A<sup>2</sup>ZERO Home Decarbonization Assessment

The Consultant must develop a series of educational outreach materials for homeowners and renters about the A<sup>2</sup>ZERO Decarbonization Assessment, its value, and why they should be seeking an assessor capable of administering it. These materials should be provided in a variety of outreach formats and for audiences of various interest levels. All final outreach materials must be shared with the City. The Consultant must work with the OSI in creating outreach and training materials to ensure the materials are consistent with other OSI initiatives.

### Help Administer the A<sup>2</sup>ZERO Home Decarbonization Assessment

The Consultant will help the City administer the A<sup>2</sup>ZERO Home Decarbonization Assessment, especially in the Bryant neighborhood and in other areas in which the Ann Arbor Housing Commission, Avalon, and Community Action Network heavily operate. This includes conducting the assessment and/or supporting residents with directly conducting the assessment on their own, answering questions, and helping identify the incentives and rebates that residents may be able to leverage to implement identified solutions.

### Timeline for A<sup>2</sup>ZERO Home Decarbonization Assessment

This scope of work will begin in early 2023 and carry forward during the duration of the contract. If the program is successful, and the 2022 Community Climate Action Millage is approved by the public, there will be an opportunity for both massive growth and expansion of this service.

### **TASK THREE: ADVISE AND SUPPORT ADMINISTRATION OF THE CITY'S ENERGY CONCIERGE PROGRAM**

In the fall of 2022, the City provided a contract with Elevate and partners to design and beta test an energy concierge service. The purpose of the energy concierge is to provide a one-stop, people service where residents can go to get advice, guidance, and support in their climate actions. The beta version of the energy concierge will be tested in a small subset of homes in Ann Arbor. If useful, the City is seeking Consultant services to:

#### **Administer the City's Energy Concierge Program**

The Consultant will lead administration of the Energy Concierge program, including providing the people services necessary to answer constituent questions, point residents towards proper and appropriate resources, and direct people to city, utility, state, and federal rebate and incentive programs. Administration includes working with the local and regional contractor landscape to ensure folk are aware and educated on Ann Arbor's climate and equity goals and have the capacity to provide the required skills and services. It may also mean working with local contractors to develop support for additional workforce training and development to fill any capacity gaps that exist.

#### **Advertise the Program**

The Consultant will develop advertising and outreach materials and work with the City and collaborators to distribute materials about the energy concierge. The intent of this action is to ensure as many City of Ann Arbor residents as possible are aware of the program and can access it, as needed, to identify and implement energy and health saving opportunities. Outreach and advertising materials should be developed to attract people from a variety of backgrounds by using a variety of medium, messages, and messengers.

#### **Annual Report on the Program and Provide Recommended Adjustments**

The Consultant must provide an annual report on the efficiency and impact of the Energy Concierge program, including details regarding the number of people served, the impacts of the concierge (e.g., GHG reductions, cost savings, health improvements), and opportunities for improvement.

#### **Timeline for Energy Concierge**

This scope of work will begin in mid 2023 and carry forward during the duration of the contract. If the program is successful, and the 2022 Community Climate Action Millage is approved by the public, there will be an opportunity for both growth and expansion of this service.

## TASK FOUR: ELECTRIFICATION SUPPORT

As outlined in Strategy 2 of the A<sup>2</sup>ZERO Plan, the City is working to support large scale electrification of homes, businesses, recreational sites, and vehicles. Supporting this work necessitates working collaboratively with the public, decision makers, our utility, appliance manufacturers, contractors, and others to create an ecosystem to support large-scale electrification. While the City has much of the skills, capacity, and expertise to move this work forward, the City wants to ensure that this work is done holistically and thoughtfully. As such, the City is looking for a Consultant to serve as a strategic advisor around beneficial electrification. Specifically, the City is seeking a Consultant to:

### Provide Strategic Planning and Strategy Advice on Electrification

The Consultant will join City staff during planning sessions and on key meetings to explore opportunities, constraints, and needed actions to support large-scale electrification of appliances, homes, businesses, and vehicles. This includes working directly with the City and the investor-owned utility to understand hosting capacity, circuit capacity, upgrade opportunities, future development priorities, and areas for greater collaboration between the City and the utility to ensure proper electrical capacity exists. This also includes helping devise strategies to support greater energy waste reduction and renewable energy adoption to reduce the demand on the grid as greater electrification takes place.

The Consultant will provide as needed support to staff in answering constituent questions and concerns, helping in the development reviews process, as needed, and join staff in meetings with developers, as needed, to help support beneficial electrification of new buildings.

The Consultant will also work with staff to design programs and incentives to support beneficial electrification retrofit programs for existing homes and businesses. This will include a market study to understand what rebates are most effective, guidance on utility rate structures that residents should embrace if moving to all-electric (and the provision of guidance on how a resident can move to said rate), and other electrification support as needed.

### Electrification Educational Support

The Consultant will work directly with City staff to create educational and training materials for developers, architects, engineers, and residents (separate trainings will be necessary) outlining what beneficial electrification is, what actions can be taken, what the benefit of those actions are, and what support resources exist to support the transition to all-electric. It is expected that this will be a combination of print, live, and recorded trainings. The Consultant should anticipate providing at least biannual trainings.

### Timeline for Electrification Support

This scope of work will begin immediately and be used, as needed, by the City's Office of Sustainability and Innovations and Community Services. It is anticipated that this scope of work will ramp up significantly over time.

## TASK FIVE: GENERAL GUIDANCE ON CARBON NEUTRALITY

This task includes general, on-demand technical and strategic advisory support as the City moves forward its carbon neutrality work. These technical and advisory services will change and evolve over the course of the contract but are likely to include:

- Strategic program planning support
- Support on building decarbonization for City facilities, including support and guidance related to achieving net zero energy affordable housing operations
- Suggestions and guidance on federal and state grant programs to pursue and, as relevant, support with related grant writing
- Strategic guidance related to supporting business electrification
- Other programmatic, policy, or strategic advice as needed to move A<sup>2</sup>ZERO forward

### Timeline for General Support

This task is expected to be minimal and ongoing throughout the life of the contract.

## ONGOING TASK: BI-WEEKLY CHECK-INS

To ensure the Consultant and the City operate as efficiently as possible, the City requires biweekly check-in meetings. These meetings are expected to last 30 minutes, except in rare occasions where the quantity of work or the topic at hand necessitates a full 60 minutes of discussion.