

# A<sup>2</sup>ZERO Home Energy Advisor: Revised Scope of Service

## Objective

The City of Ann Arbor is seeking an Administrator to operationalize and administer the Home Energy Advisor (HEA) Program. Activities include maintaining and sharing information on residential building decarbonization, coordinating and completing building assessments, assisting residents with identifying rebates and incentives for residential building decarbonization, and responding to resident requests for building-related decarbonization assistance. This work also includes coordinating with other City programs related to building decarbonization to ensure a seamless customer experience.

The City is seeking these services for a period of 36 months, with the City reserving the option to extend the contract for up to two, 1-year terms. The Administrator will work closely with City staff to establish the HEA Program, building off a successful pilot launched by the City and collaborators in the summer of 2023. The OSI Director (or their designee) will oversee the direction and quality of work under this contract.

The design and administration of the HEA Program needs to meet the City and the Ann Arbor Office of Sustainability and Innovations (OSI) goals, including:

1. *Equity*: Reduce energy burden and prioritize services to under-resourced and climate justice communities in Ann Arbor.
2. *Climate*: Make rapid progress on strategies 1, 2, and 3 of A<sup>2</sup>ZERO, which are deploying energy efficiency and all-electric technologies, as well as supporting renewable energy adoption.

In addition to the above, the HEA Program must:

1. Provide outstanding customer service.
2. Provide accessible, intuitive, and well-designed materials.
3. Support diverse market areas (single family, 1 – 4 unit multifamily, larger multifamily, owner-occupied, tenant-occupied, landlords, low-to-moderate income households, market rate households).
4. Provide a seamless process for participants to access programs, including the Ann Arbor Community Climate Action Millage rebates and Home Energy Rating Disclosure Program.

## Requirements

The following are requirements for the HEA Program Administrator:

**A. Program Planning.** The Administrator shall review outcomes and materials of the pilot program and all program goals and prepare a plan for operationalizing the HEA Program within 30 business days of contract award. Program planning must include, but is not limited to:

*1. Background and Information Gathering.* The Administrator shall complete the following tasks before preparing the program plan. These tasks must be informed by the lessons learned from the HEA Program pilot and from similar programs across the country. The Administrator may request additional information from OSI as necessary to complete the plan. Required tasks include:

a) Kick-off meeting with OSI staff;

b) Meeting with City staff representatives from relevant offices and programs to gather information relevant to design the HEA Program;

c) Reviewing materials from the HEA Program pilot, which include:

Summary Report of experience, findings, and lessons learned

Path to Zero Decarbonization Template

Energy Assessment Report

Operations Guide

d) Reviewing materials, experience, findings, and lessons learned from other communities that have operated similar programs, including Holland, MI.

e) Meeting with City staff representatives weekly to share status updates and collaboratively make program decisions.

*2. Operational Timeline Development.* The Administrator shall develop a detailed timeline for operationalizing the HEA Program, including key dates and deliverables, and a date certain for program launch. This will include collaboration with the Rebate Administrator, and ensuring the HEA is fully operational within 90 days from contract execution.

*3. Operations Plan.* A detailed plan outlining the approach to completing tasks B and C below, inclusive of process steps, key dates, deliverables, expected outcomes of deliverables, input needed from OSI, key outreach and engagement components, and information on any software, sub-contractors, or third parties used to fulfill requirements. This also includes development of a flow chart indicating the various participant pathways to engage with the HEA Program.

*4. Participant Eligibility and Verification Process.* Creation of a process and decision pathways for ensuring and validating that individuals coming to the HEA Program are eligible participants, including verifying eligibility for certain City programs.

5. *Draft Material Design.* Draft mock-ups of key materials, including decarbonization plans and assessment reports, which must be approved by OSI before being formalized into the program. All deliverables and public-facing materials, both online and printed, must be A<sup>2</sup>ZERO-branded, consistent with branding guidelines, and approved by OSI before being posted, circulated, or distributed in anyway.

6. *Metrics Tracking Plan.* A strategy, and ideally a platform designed, for tracking program performance, number of participants, and program impact, among other key data points must be fully developed for program launch. OSI will work with the Administrator to develop the key metrics necessary for program tracking, but the Administrator will be responsible for tracking these metrics.

**B. Administration of the HEA Program.** Once designed, the Administration will be responsible for operating and maintaining the HEA Program. Key tasks under this action include:

1. Administration of the participant eligibility and verification process, including a process for verifying income-qualified residents, if required, for certain programs.

2. Creation and real-time maintenance of web-based resources that provide information on home decarbonization, program information, contact information, and metrics demonstrating program impact. The website may be hosted on the City's website or hosted by the Administrator but the City will work with the Administrator to make a final determination of where the website should reside and must review all content before it is posted on any public facing website.

3. Creation and administration of a Help Center to receive and respond to phone calls, emails, forms, chats, referrals, and/or other submitted inquiries regarding building decarbonization. This includes responding to all requests that come in and documenting relevant information to understand frequently asked questions and concerns.

4. Customized building decarbonization plan development explaining how to combine energy efficiency, electrification, renewable energy, and health and safety improvements to transition the resident's home to carbon neutrality. Customized plans must be **actionable**, and include incentives, rebates, income-qualified programs where appropriate, contractor information, and financing resources, as well as next steps to action. A renter/landlord path will be developed as well, with resources and advice for renters to improve efficiency as well as engage their landlords.

5. Assessing individual buildings to gather key pieces of information on a building, its equipment, and its occupant's concerns to provide actionable information on decarbonizing. The assessment must:

a) Be compatible with the U.S. DOE Home Energy Score, when performed on-site.

b) Be administered by a qualified professional.

c) Include a virtual assessment process, which should be the primary option for most participants.

d) Include an in-person assessment process to meet the needs of participants with limited access to or familiarity with technology, limited mobility, or those otherwise requiring additional assistance.

e) Include reports with actionable information to the participant, and which are utilized to inform the customized building decarbonization plans discussed above.

6. Creation and maintenance of an internal, online-accessible database and report template that includes, but is not limited to:

a) Address of participant.

b) Demographic information.

c) Type of assessment completed and copy of assessment.

d) Log of communication with participant and time to resolution.

e) A "DTE: Customer Consent Release Form" (see Attachment A) and/or third-party utility data link (optional), and accompanying data.

f) Other metrics the Administrator deems necessary to complete the objectives of this RFP.

7. All services outlined above must be delivered in a timely manner, with responses to inquiries within 2 business days, and the ability to schedule meetings, building assessments, phone calls, and deliverables within a two-week timeframe from request. The Administrator will be evaluated based on the ability to, at a minimum, deliver the following:

- Average of 12 assessments per week
- Average of 12 Path to Zero (PTZ) Assessment Reports created and distributed to residents via virtual meeting per week
- Average of 12 resident follow-up calls per week for those that received a PTZ Assessment.
- Average of 10 calls per week through the help center where the Administrator assists with answering resident's on-demand questions, including responding to requests for technical assistance, project coaching, program referrals, etc.

At any point in the project, should volume of interest exceed stated levels, a waiting list will be maintained, with regular updates to those on the list about status and expected timeline. Additionally, OSI staff will immediately be notified if a waiting list is created and will retain the right to organize an immediate call with the Administrator to devise a plan to ameliorate the waiting list.

8. Twice a month meeting between the Administrator and the City's representative to assess program status. Program status meetings may be more frequent as necessary, as determined by the City.

9. Quarterly status reports, inclusive of successes and proposed HEA Program revisions. OSI may authorize changes to the HEA Program in alignment with the goals of the City and OSI, based on information shared in these status reports and twice monthly calls. This also includes biannual presentations to the City's Energy Commission and annually presenting to Ann Arbor City Council on the efficacy and impact of the program.

10. Regular and real-time communications, as necessary or requested, on the status of the program and any issues or concerns that arise.

11. Routine administration of participant evaluations to understand the impact, effect, and opportunities for improving the HEA Program. These evaluations must be given after anyone interacts with the HEA and aggregated and shared with OSI staff during at least the quarterly status reports, or at more frequent intervals as requested.

12. Preparation of an annual report, beginning 12 months after the launch of the HEA Program, summarizing the impact of the Program.

13. The Administrator shall support and supplement the City's outreach and marketing efforts, including but not limited to attendance at community events; engagement with community action agencies, faith-based and civic organizations; and social as well as earned media. The Administrator will coordinate an outreach/marketing strategy with the City to ensure effective use of City and Administrator resources. At least 120 hours will be allocated to marketing and outreach each year of the project.

### **C. Additional services as needed.**

The Administrator shall provide hourly bill rates, in addition to aggregate program costs for the tasks outlined above, for all key staff that may be needed to provide additional services as directed and approved by OSI, related to creation and administration of the HEA Program. If OSI identifies additional services are needed, a request will be made in writing to the Administrator from OSI and the Administrator will provide a quote for the work. OSI must give approval to proceed in writing before the Administrator begins work on any additional services or tasks. No additional funding will be provided, however, for tasks A and B unless the City decides to change the scope of these two tasks.