



**focus on energy**®

Partnering with Wisconsin utilities

**REQUEST FOR PROPOSALS FOR:  
Community Small Business Program**

Issued: Monday, August 8, 2022

Intent to Bid Due: Friday, August 12, 2022

**Proposal Due: Friday, September 2, 2022**

Submit to: APTIM Government Solutions, LLC

**FOCUS ON ENERGY® Program Administrator**

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## 1. Request for Proposal (RFP) Summary

Key Events	Key Date
<b>RFP Issued</b>	Monday, August 8, 2022, 12:00 pm CDT
<b>Intent to Bid Due</b>	Friday, August 12, 2022, 11:59 pm CDT
<b>Bidder Questions Due</b>	Friday, August 19, 2022, 11:59 pm CDT
<b>Bidder Q&amp;A Response Document Posted</b>	Friday, August 26, 2022, 5:00 pm CDT
<b>Proposals Due</b>	Friday, September 2, 2022, 11:59 pm CDT
<b>Notification of Request for Interview</b> Interviews will occur the week of September 26. Not all Bidders will be interviewed.	On or before Monday, September 19, 2022
<b>Notification of Successful Bidder(s)</b>	Wednesday, October 5, 2022
<b>Bidder(s) Accepts</b>	On or before Wednesday, October 12, 2022
<b>Program Launch</b>	Monday, January 2, 2023

The Focus on Energy Program Administrator (Administrator) is issuing this RFP for the selection of an Implementer with Implementer Subcontractor(s) to deliver a Community Small Business Program for Focus on Energy (Program). The purpose of this RFP is to provide Bidders with information which enables them to prepare and submit a proposal to support the Scope(s) of Work. The Administrator intends to use the results of this RFP to select a Bidder to implement the Work, with the selected Bidder beginning October 2022 and the program operating January 2, 2023, through December 31, 2024. The selected Bidder will complete program design, launch, and implementation activities. Costs incurred by selected Implementer for ramp-up and launch activities will come from the Total Contract Budget Amount.

## 2. Bidder Considerations

### a. Capitalized Terms

Capitalized terms not otherwise defined shall have the meaning provided in the Focus on Energy Policy Manual<sup>1</sup>.

### b. Program Implementation Experience

Bidders will be, at a minimum, entities with knowledge and experience performing the work for which they are bidding. It is within the Administrator's sole judgement to determine

<sup>1</sup> [Administrative Resources | Focus on Energy](#)

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whether a bidder meets the general criteria in this section for Focus on Energy selection. Any proposal not meeting the general criteria below may be rejected without review.

**c. Bidder Conflicts of Interest**

Organizations contracted directly with the Statewide Energy Efficiency and Renewable Administration (SEERA), the Public Service Commission of Wisconsin (PSC), or their Contractors doing Focus on Energy work are NOT eligible to bid on this RFP. This includes the Administrator, Evaluator, Fiscal Agent, and Compliance Agent. Current Focus on Energy Implementers are eligible to bid on this RFP.

Organizations implementing voluntary utility programs for Wisconsin utilities and organizations implementing Commitment to Community programs serving residential Customers either as prime or Subcontractors, may bid on this RFP.

An organization serving as an Implementer or Implementer Subcontractor will not have responsibility for more than 30% of the total Residential and Business Portfolio budgets (accounting for both implementation costs and Incentives). Refer to the Focus on Energy Policy Manual<sup>2</sup>.

**d. Financial Requirements**

Bidders are required to demonstrate and verify they have the financial resources and stability to perform the proposed work (see Section 6.f.).

**e. Requirement for Wisconsin Operations**

Bidders must be able to support staff in Wisconsin via operation of an office or home office(s). While not required, the Administrator prefers employees spending more than 50% of their time on Focus on Energy to be Wisconsin-based and will consider this when scoring proposals. Employees engaging directly with Customers, Trade Allies, and other stakeholders are expected to be able to attend in-person meetings with those parties when requested.

**f. Implementer Subcontractors/Vendors**

A successful Bidder can be either an individual organization or organizations teaming together to respond to this RFP. The Administrator reserves the right to counter-propose Vendor or Subcontractor relationships to bidders.

Focus on Energy does not permit mark-ups on Subcontractor, Vendor, or other costs nor will it allow for Subcontractors to have Subcontractors.

## 3. Introduction

The Administrator is seeking proposals from individuals or firms with expertise in small business engagement and energy efficiency to launch a Community Small Business Program supporting the unique needs of small business owners. Under this program, eligible participants are

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<sup>2</sup> [Administrative Resources | Focus on Energy](#)

expected to be identified by utilities and community-based organizations to receive additional support beyond current Focus on Energy offerings.

Traditional energy efficiency programs often see lower participation from small businesses for a variety of reasons. The quantity and diversity of small businesses, both geographic location and business type, make traditional marketing efforts less impactful therefore less productive at building program awareness. The need to maintain positive cash flow combined with the typical operating structure of a small business puts additional stress on business owners limiting their desire or ability to think about energy-saving improvements. To engage with small business requires a concentrated effort and additional resources which can come at a higher cost compared to serving other markets. These characteristics can be a deterrent for programs to target small businesses, particularly for those with aggressive savings goals or limited financial resources.

Focus on Energy recognizes the impact thriving small businesses can have on local communities. They play a key role in supporting economic growth, are actively involved in the local community, and help keep dollars local. Small businesses also play a critical role in shaping the community's identity. Focus on Energy sees significant value in supporting small businesses and the communities they operate in which is why it seeks to offer a program designed specifically to support their unique needs.

The next several years will continue to bring change to the energy industry and the energy efficiency marketplace. Focus on Energy needs to remain forward-thinking, adaptable, and a relevant and valued partner to its utility partners and stakeholders. Customers will continue to expect simple program participation pathways and experiences highly tailored to their individual needs. Policy makers also expect Focus on Energy to continue reaching ambitious energy-savings targets while serving all eligible Customers in the state.

Strategic goals for the 2019-2022 period (Quad III) were developed based on participant and stakeholder feedback. While the goals are expected to change for the 2023-2026 period (Quad IV), these elements will continue to remain important to Focus on Energy:

- **Utility Engagement:** Utility and cooperative partners are highly satisfied with Focus on Energy and see it as a value-added service for their Customers/members.
- **Innovation:** Focus on Energy deploys innovative solutions that deliver enhanced program quality, cost efficiencies, and lasting market changes.
- **Administrative Excellence:** Focus on Energy offers excellence in program administration and delivery, providing benefits to Wisconsin utility Customers greatly exceeding the costs to achieve them.
- **Customer Experience:** Wisconsin utility Customers have a strong understanding of what Focus on Energy is and recognize it as an accessible program with easy-to-understand participation paths.

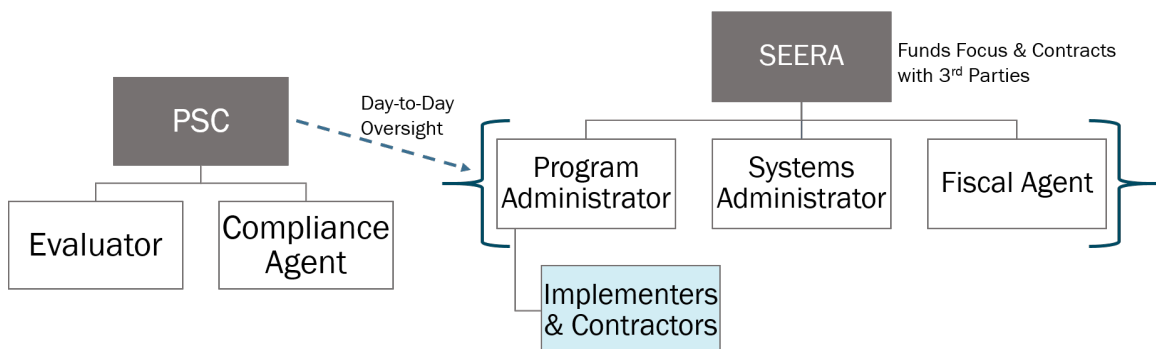
## 4. Background & Governance

Focus on Energy is funded by Wisconsin's investor-owned energy utilities, as required under Wis. Stat. § 196.374(2)(a) and participating municipal and electric cooperative utilities. Focus on Energy provides Customers with technical assistance and financial Incentives to help them

complete energy efficiency and renewable energy projects that otherwise would not be completed. Participating residents or businesses must be Customers of a participating utility<sup>3</sup>.

The primary roles and organizations that make up Focus on Energy include:

- **SEERA:** This organization, created by and consisting of investor-owned utilities, collectively funds and contracts for the administration of the statewide energy efficiency and renewable energy programs.
- **PSC:** This independent state agency regulates Wisconsin’s public utilities and oversees Focus on Energy.
- **Evaluator:** This organization performs annual process and impact evaluations and assesses portfolio cost-effectiveness.
- **Compliance Agent:** This organization performs annual audits of Focus on Energy activities and expenditures to ensure funds are spent prudently and consistently with the Focus on Energy *Policy Manual*.
- **Administrator:** This organization is responsible for (1) working with the PSC to establish portfolio, Market Sector, and individual program goals and budgets; (2) bidding out all programs and selecting and negotiating contracts; and (3) managing program and portfolio performance and goals. The Administrator is not allowed to implement programs in Wisconsin.
- **Systems Administrator:** This organization manages the Focus on Energy enterprise database software system and other software systems utilized for Focus on Energy.
- **Fiscal Agent:** This organization is responsible for paying all approved invoices and Incentives and rebates for Focus on Energy.
- **Implementers and Program Contractors:** These organizations deliver energy efficiency and renewable energy programs to eligible Wisconsin utility Customers and are responsible for meeting the Program goals as established by the Administrator and PSC.



More information on Focus on Energy can be found at [focusonenergy.com](http://focusonenergy.com).

#### a. Commission Quadrennial Planning Process (QPP)

State statute requires the PSC conduct a planning process every four years to set policies and provide guidance for the Focus on Energy Program and other utility energy efficiency

<sup>3</sup> [Participating Utilities | Focus on Energy](#)

efforts across the state. The PSC worked with the Evaluator to complete a potential study<sup>4</sup> prior to the start of the fourth QPP to inform energy savings and goals. Commission decisions impacting Quad IV are happening throughout 2022 and may impact the final program design. Complete Commission memos containing details of the items discussed in each phase are in the PSC’s E-Services Portal docket 5-FE-104<sup>5</sup>. The schedule is included below.

**Table 1 QPP Schedule**

QPP Task	Date
Commission decisions – scope	December 2, 2021
Commission decisions – Phase I (macro policy items)	April 7, 2022
Commission decisions – Phase II (micro policy items) <sup>6</sup>	August 4, 2022
Commission decisions – Phase III (budget and goals)	Q4 2022

**b. Administrator Initiatives**

**Utility and Stakeholder Engagement**

Focus on Energy closely collaborates with participating utilities and external stakeholders, such as national and state trade associations and advocacy groups, on many aspects of program operations, including marketing and Customer outreach activities, collection and sharing of Customer data, and coordination with utility programs. The Administrator is responsible for primary engagement and coordination with utilities and external stakeholders.

Implementers, in coordination with the Administrator, attend meetings with utility contacts to engage the utility account managers and customer service representatives relevant to utility coordination. Implementers closely coordinate with the Administrator to adapt engagement strategies and Incentives and rebates to meet utility expectations and priorities. They also coordinate with the Administrator on engagement strategies and opportunities with stakeholder groups. Implementers are expected to be involved in trade associations and their events through membership, volunteer, or sponsorship opportunities providing access to their target market.

<sup>4</sup> [Potential Study | Focus on Energy](#)

<sup>5</sup> [PSC - Electronic Records Filing \(ERF\) \(wi.gov\)](#)

<sup>6</sup> In its Phase II decisions on August 4, the Commission directed the Administrator to conduct an analysis during the first year of Quad IV to better identify underserved customers, target program offerings, develop KPIs and report back to the Commission by March 31, 2024. Further, they directed the analysis to emphasize small business customers. The Administrator started this analysis in preparation for the RFP, and the first year of program implementation will be used to inform the development of KPIs asked for by the Commission by March 31, 2024.

### Training

The Administrator manages a training program providing energy efficiency education to Customers, Trade Allies, manufacturers, and program staff across all Focus on Energy programs. As a deliverable, Implementers will provide the Administrator recommended training topics in August of each year.

Courses are chosen based upon their ability to reach multiple participants, impact low-to-no cost projects, and provide lift to existing offerings. The Administrator may work with Implementers to identify qualified trainers and Customer sites, as appropriate.

### Marketing

The Administrator develops and executes umbrella-level marketing and communications for Focus on Energy, along with setting overarching tone and messaging. Customers should perceive Focus on Energy as a seamless set of offerings and not distinct programs; thus, marketing will not specify program names but will instead focus on Customer type, Incentive or rebate, or technology. Implementers develop and deliver an annual Market Engagement Plan (MEP) outlining goals, strategies, and tactics to meet the overall Strategic Plan goals. All marketing plans, messaging, delivery, and implementation are reviewed and approved by the Administrator. Implementers are responsible for all campaigns and execution of any offerings within their oversight to ensure consistent messaging across Program offerings.

- **Public Relations & Media Support:** The Administrator is responsible for all media and publicity for Focus on Energy and may request support from Implementers to promote success stories.
- **Spanish Translation:** The Administrator will translate general program content into Spanish. Implementer should develop campaigns to drive participation for Spanish-speaking utility Customers using their respective marketing budgets.
- **Social Media Channels:** The Administrator currently manages Facebook, Twitter, LinkedIn, and Instagram accounts on behalf of Focus on Energy. Implementers submit social media content to the Administrator.
- **Website:** The Administrator is responsible for updating and editing the website, along with managing any tools linking to or integrating with the website. Implementers provide on-going edits to website content for their market. Implementers must submit any tools that will be integrated into the website or systems that will be linked to the website for approval by the Administrator.
- **Communications:** The Administrator sends monthly e-newsletters to its partnering utilities, quarterly emails to all past business and residential participants and Customers who have requested these, and as needed updates to Trade Allies. The Administrator requests content from Implementers for these emails. Implementers are encouraged to develop their own nurture campaigns to past participants and to drive awareness and/or participation in other Focus on Energy offerings.
- **Online Ordering Portal:** The Administrator maintains an online portal through which partnering utilities can order collateral for their own promotion of Focus on Energy. Implementers provide the Administrator with print-ready PDFs to keep this portal current.
- **Customer Satisfaction:** The Evaluator currently verifies Customer Satisfaction quarterly through ongoing emailed surveys. Survey responses are available through the database, and Implementers review survey responses regularly to identify trends



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or resolve Customer concerns. Implementers may propose additional surveys for review and approval by the Administrator.

### **Future Focus**

To foster innovation and continually grow and strengthen program offerings, Focus on Energy has a product development process called Future Focus. Future Focus is leveraged for all types of innovation, including potential pilot offerings, Environmental and Economic Research and Development (EERD) projects, significant offering changes, new measure development, and other areas identified over the course of the quadrennial period. Occasionally, Focus on Energy will release targeted calls for ideas. However, concepts and ideas will be accepted on a rolling basis through a point of contact or a submission form on the Focus on Energy website.

Implementers innovate in coordination with the Administrator through the Future Focus process. All Implementers will support innovation by adding new measures and technologies, improving the integration between measures, enhancing the delivery, and developing new market engagement strategies.

### **Diversity, Equity, and Inclusion**

Focus on Energy is committed to helping all ratepayers of participating utilities in Wisconsin reduce their energy use. It is our responsibility to ensure all eligible customers can participate in and receive value from our programs. Focus on Energy strives to use its influence in the community to increase access and participation by delivering equitable and inclusive programs empowering Customers, removing barriers, and meeting the needs of the diverse Wisconsin communities we serve. Implementers play a large role in this by inviting, engaging, and respecting a diversity of perspectives when designing and implementing programs.

## **5. Community Small Business Program**

Energy efficiency can be a valuable tool to keep small business operating expenses at a manageable level and help boost profit margins. The goal of the Community Small Business Program is to educate small businesses on the value of energy-efficiency as well as increase accessibility to energy efficiency improvements. As indicated by the name, this program will be focused on small businesses within specific communities or geographic territories. Because the offering is community specific, a strong emphasis will be placed on collaboration with community-based organizations and utilities to offer services or incentives above and beyond what is currently offered by Focus on Energy.

### **a. Overview of Previous Focus on Energy Small Business Programs**

Focus on Energy offered a Small Business Program from 2012 through 2019. From 2012-2016 the program targeted Customers with a monthly peak demand of less than 100kW. Customer eligibility was verified via Customer provided utility bills. Eligible Customers received a free lighting assessment, a consultation on energy-efficient upgrades, and direct installation of energy-efficient products by a qualified, participating contractor (Trade Ally). Data collected during the assessment was entered into a software tool and Customers received a report summarizing energy-saving opportunities. Customers then had the option

to purchase additional energy efficiency products, including lighting and refrigeration, at a significantly reduced price. Customers liked this model because it significantly improved the affordability and accessibility to measures providing immediate energy savings. Trade Allies liked the exclusivity of the program which provided them a competitive advantage in the market. Customer eligibility verification and quality control processes had flaws and costs to deliver energy savings increased which ultimately led to its discontinuation.

In 2017, the program was redesigned and targeted Customers with an average monthly consumption of 40,000 kWh or less during July and August. Customers were required to submit copies of their July and August utility bills with their applications to verify eligibility. The program shifted to a prescriptive rebate approach with a reliance on the existing Focus on Energy Trade Ally network to help small businesses identify and complete energy efficiency projects. Customers were eligible for as much as 30% more in financial incentives compared to prescriptive rebates for non-small businesses. Enhanced rebates were available for most technology categories including lighting, HVAC, refrigeration, and process systems. This was a more cost-effective option to deliver savings, and since it was similar to other programs, it was liked by Customers and Trade Allies. Trade Allies appreciated the fact any Trade Ally could participate in the program, creating more opportunities and reasons for them to support small businesses. Providing copies of utility bills was often a barrier to participation, and there was a high rate of incomplete applications submitted which ultimately impacted processing times. This program was discontinued at the end of 2019 due to the need for more cost-effective savings based on the goals and budgets set for Quad III.

In addition to the Small Business Program, a comprehensive program was offered in specific rural communities in 2017 and 2018 called the Community Small Business Offering which was a result of funding approved specifically to support rural customers. Customers in specific rural communities received a high-level facility assessment, a free pack of energy-saving products, and were eligible for Incentives 50% higher than offerings for nonrural small business Customers. Trade Allies were also offered incentives intended to encourage travel to targeted rural communities due to some having fewer local Trade Ally options. This offering included extensive, community-based outreach activities targeting utilities, community organizations, Trade Allies, and Customers to enhance awareness of energy efficiency opportunities. This offering was discontinued due to the unique funding to support these efforts expiring.

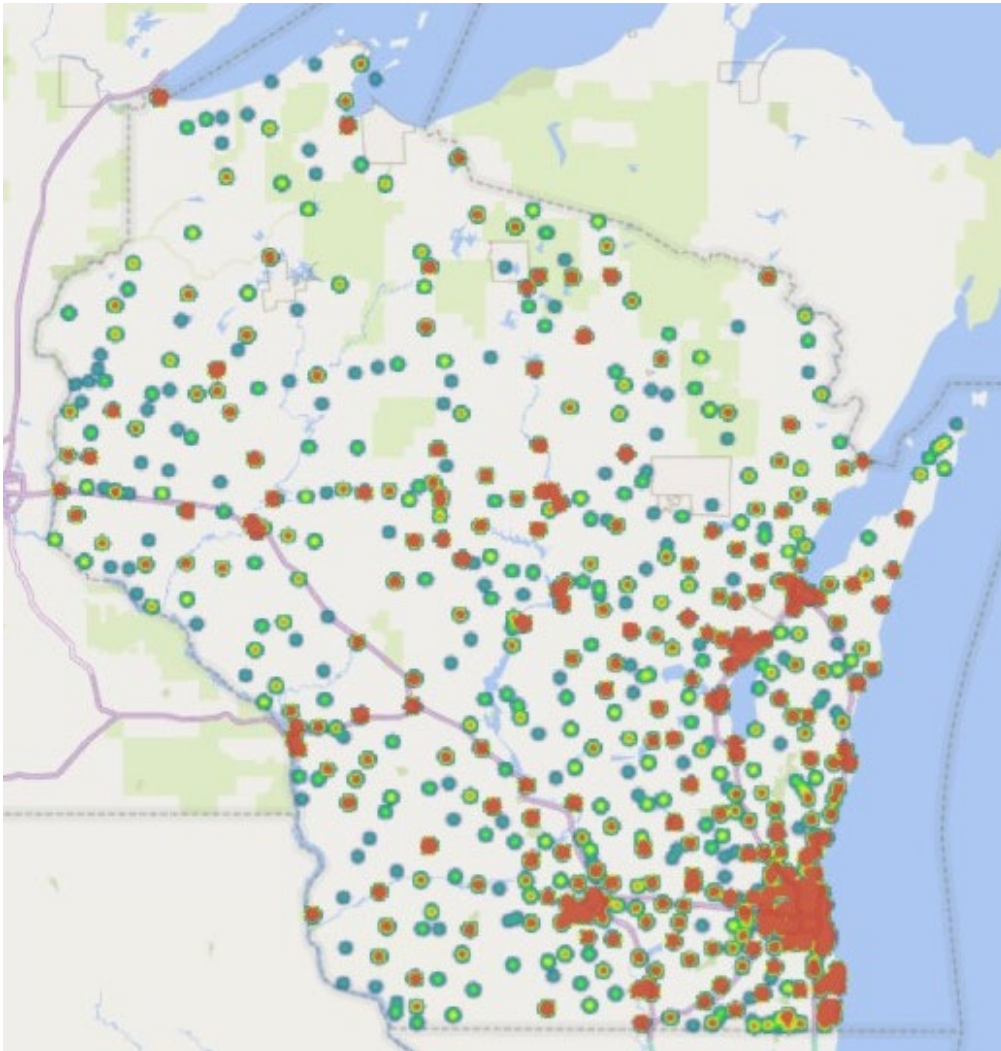
Small businesses are currently eligible to participate in custom incentive and prescriptive rebate offerings; however, there are not unique participation opportunities specifically for small business Customers.

A key consideration when deciding to launch a new program for small businesses was to ensure it was designed in a way which does not compete with existing programs and provides unique opportunities to key small businesses within targeted communities. Key small businesses are considered those who play an active role in the community, such as through supporting local organizations or non-profits, donating to community initiatives, or who have been influential in developing the community's identity. The program design should rely on input from community-based organizations and utilities to identify key small businesses within a community. Successful program designs will prioritize offering meaningful participation opportunities above achieving high participation or savings numbers and will focus on the unique needs of the identified key small businesses.

### Historical Customer Participation and Distribution

The maps below provides insight into the geographic density of customer participation in small business programs offered from 2015 to 2019.

**Figure 1 Geographic Distribution**



## b. Eligibility Requirements

### Eligible Participants

Small businesses eligible for this program should be businesses who play an active role in the community, such as through supporting local organizations or non-profits, collaborating on community initiatives, or who have been influential in developing the community's identity. These businesses should be identified based on input from community-based organizations and utilities who are closest to the small businesses within a community.

Beyond the eligibility requirements mentioned, it is preferred qualifying small businesses have between two and 100 employees and be independently owned and operated (i.e., chain stores and franchises do not qualify). Additional criteria should be identified by the bidder as part of their proposal.

Publicly owned businesses (schools and government), agribusinesses, and multifamily properties are not eligible for this offering. Businesses operating out of a single-family or multi-family property are also not be eligible.

### Eligible Program Types

The Community Small Business Program is intended to provide the additional support selected small businesses need to pursue energy-efficiency projects. This additional support may include, but is not limited to, providing in-depth energy-assessments, facilitating gathering contractor quotes, managing equipment purchasing and installation, and funding all or a significant portion of the project.

Bidders are encouraged to design the program in a way where there is a unique participation opportunity provided to eligible small businesses. This Program should not replicate existing program designs, meaning enhanced incentives on existing custom or prescriptive offerings is not preferred. Bidders should describe how they will partner with community-based organizations and other stakeholder groups during the design and program delivery phases. Bidders should describe how they plan to coordinate with other Program Implementers to provide a seamless and positive customer experience after participation in the program.

Energy-savings are expected to be generated as a result of related program activities; however, there are no energy-saving targets specified as part of this RFP. As part of the Proposal and Pricing Spreadsheet (Attachment C), Bidders should identify energy savings they expect to deliver because of the Community Small Business Program which would not otherwise be realized had the program not existed.

### Ineligible Program Types

Bidders should not propose a program which serves customers in the following areas:

- Programs targeting non-small business commercial, industrial, agricultural, schools, and government sectors.
- Home-based businesses.
- Behavioral programs.
- Appliance recycling programs.
- New construction programs.
- Renewable energy programs.

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## c. Key Delivery Elements

### Measure and Incentive Overview

#### Custom Incentives and Prescriptive Rebates

Focus on Energy currently offers businesses custom Incentives and prescriptive rebates for equipment in the following technology categories:

- Lighting – Including interior and exterior fixtures and controls.
- HVAC and Plumbing – Including space heating, cooling, building controls, and water heating.
- Process Systems – Including compressed air systems, variable speed drives, industrial specific equipment.
- Commercial Refrigeration – Including refrigerated case equipment, motors, lighting, and controls.

A complete list of incentives and rebates can be found by visiting the Focus on Energy website. Bidders can offer financial support for equipment upgrades in these categories and claim the corresponding savings; however, it is preferred this program design avoid traditional custom and prescriptive incentive models and application methods. Bidders should describe their incentive and measure strategy and justification for their proposed approach.

#### New Construction

New construction projects, including new buildings or major renovations, would not be eligible through this program.

#### Innovative Delivery

Successful bidders are encouraged to consider innovative design elements to differentiate their program design from historical delivery models.

#### Incentive and Rebate Limits

Total Incentives are limited to \$300,000 per project and \$400,000 per Customer per calendar year for all Focus on Energy Incentives and rebates (not including Midstream or Utility Voluntary Programs).

#### Incentive or Rebate Recipient

Incentives and rebates are paid to Customers of participating utilities where the Customer is the party listed on the electric or natural gas utility bill. The Customer for the project site participating in the program may assign their right to participate and receive Incentives to another payee.

#### Delivery Expectations

Implementers are expected to consider the following items when completing program design:

- **Community Specific:** Focus on Energy is interested in concentrating on specific communities or geographic territories for this program. Communities selected should



have community-based organizations and utilities who have a strong understanding of their small business population and a desire to collaborate with Focus on Energy.

- **Innovative Delivery:** Implementers will incorporate design elements which differentiate their delivery from historical models. These design elements may be to staffing, measure offerings, in-field tools, or marketing tactics.
- **Simple Participation:** Positive initial experiences will make businesses want to continue working with Focus on Energy. A single point of contact and simple process for participation and ongoing technical assistance can increase program participation and overall satisfaction.
- **Community Partnership:** Implementer will develop relationships with community-based organizations and other community resources to increase program awareness and participation.
- **Technical Assistance:** Strong technical assistance supports increased participation and Customer satisfaction by making energy efficiency improvements easier to understand and relevant to the unique needs of the property. Implementers will provide Customers with assistance identifying and quantifying energy efficiency opportunities, obtaining Incentives, and coordinating with Trade Allies, utility representatives, and other stakeholders.
- **Innovative Marketing:** Different marketing strategies and tactics should be used to inform potential participants what the program has to offer. As the dynamics of the small business market change on a regular basis, Implementers are expected to change their marketing strategies as well.
- **Coordination with Stakeholders and Other Programs:** Implementers will recognize the importance of close coordination with the Administrator, other Implementers, utilities, Trade Allies and their Associations, and other stakeholder groups in energy-related issues. Implementers will place specific emphasis on coordination and eligibility between the Community Small Business Program and other Business Portfolio programs focusing on approaches to help facilitate the exchange of leads among programs, taking advantage of the opportunities to serve as a feeder for other programs.
- **Exceptional Customer Support:** The customer support center is administered through Zendesk. Inquiries about specific programs are transferred to Implementers for additional Customer assistance and information, and all calls and online web inquiries are logged. Customer support representatives are required to respond to all inquiries within one business day. Implementers are required to have an agent available in Zendesk from 9 am to 5 pm CT Monday through Friday except for corporate holidays. It is preferred Implementers have one or more bi-lingual staff on their customer support team.
- **Enterprise Tracking Database System:** Focus on Energy uses a Microsoft Dynamics database to track all Customer- and application-related information. All information collected by Implementers belongs to Focus on Energy and must be stored in this enterprise system.

- **Policies and Procedures Compliance:** Implementer should refer to the Policy Manual<sup>7</sup> and Operational Procedures Guide<sup>8</sup> for guidance on Program requirements and how to meet contract deliverables.
- **Annual Evaluation Process:** Focus on Energy is evaluated by an independent third-party evaluator. The Implementer is responsible for responding to all questions and data requests from the Evaluator which can include documentation, savings calculations, and implementation processes. Implementers will play an active role in supporting annual program evaluations<sup>9</sup>.

### Savings Targets and Budgets

The program is proposed to operate in 2023 and 2024 with the potential for continuation through 2026. An energy-savings target was not defined for the Community Small Business Program; however, Bidders should identify how much energy-savings will be generated due to the presence of the Program.

Bidders should propose Performance Metrics outside of energy-savings to gauge their success in delivering the program and achieving the desired intent. These Performance Metrics may be related to the following key areas of delivery:

- Community Benefit
- Innovation
- Stakeholder Engagement
- Trade Ally Participation
- Customer Experience
- Customer Impact

The total budget for the Community Small Business Program is \$5 million for 2023 and 2024. No more than \$2.5 million can be spent in 2023 and any unspent funds from 2023 may carry over into 2024. The stated budget includes Incentive and non-incentive funds. Implementer should provide an expected budget for start-up costs occurring in 2022 if applicable.

## 6. Bidder Proposal Instructions and Requirements

Bidder's proposal should not exceed 50 pages, excluding: cover page, proposal check list, table of contents, collateral samples, financials, Affidavit of Non-Collusion, and the Proposal and Pricing Spreadsheet.

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<sup>7</sup> [Administrative Resources | Focus on Energy](#)

<sup>8</sup> [https://www.focusonenergy.com/sites/default/files/inline-files/RFP/2022\\_Focus\\_on\\_Energy-Operational\\_Procedures\\_Guide.pdf](https://www.focusonenergy.com/sites/default/files/inline-files/RFP/2022_Focus_on_Energy-Operational_Procedures_Guide.pdf)

<sup>9</sup> [Evaluation Reports | Focus on Energy](#)

**a. Cover Letter**

Bidder will include a cover letter with the proposal clearly identifying the name of the prime organization or individual proposing the program and the proposed teaming arrangement (if applicable). The cover letter should be signed by an authorized representative for the primary organization.

**b. Executive Summary**

Bidder will provide a high-level summary of its proposal and a brief description of the program design Bidder is proposing to implement.

**c. Implementation Approach**

Bidder will describe their proposed implementation approach, specifically addressing the items below.

**Team Structure**

For teams of Implementers and their Subcontractors, define roles and responsibilities by providing:

- An organizational chart showing relationships between the prime and various Subcontractors; and
- Clear definition of services provided by each organization represented.

**Strategy and Vision**

Provide details of how the proposed approach supports Focus on Energy strategy and vision, particularly:

- Emphasis on the Customer experience.
- Value-added services to utility partners.
- Benefits to Customers.
- Design variations supporting portfolio innovation and evolution.

**Task 1: Start-Up and Launch**

The Administrator recognizes creation of a new program will impact Customers, Trade Allies, and other stakeholders. A thoughtful and comprehensive approach is essential to ensure a smooth launch, especially if there is a change in Incentives and services offered to the market. Focus on Energy has a large and diverse group of Customers, Trade Allies, distributors, retailers, and other stakeholders vital to the success of its many programs. Bidders should demonstrate a solid understanding of all the elements involved in a successful launch and should provide evidence they have managed this in the past. In this section, describe the following:

- Identify key activities and milestones needing to be accomplished for a successful launch including:
  - Setting up key infrastructure.



- Demonstrating IT security controls are in place to protect confidential Customer Information accessed via the Focus on Energy enterprise tracking database.
- Participating in utility meetings, as requested.
- Developing necessary marketing materials.
- Provide a detailed start-up timeline emphasizing speed to market.
- Provide a risk mitigation plan.

### **Task 2: Delivery**

Effective delivery is key to achieving not only energy-savings goals but also ensuring utility partners are highly satisfied with Focus on Energy, as they see the Program as a value-add for their Customers, who have a strong understanding of what Focus on Energy is and recognize it as an accessible program with easy-to-understand participation paths. Bidders should describe their delivery approach and the rationale behind the approach.

#### Key Program Design Elements

Bidders should describe their program design including:

- Approach and strategy for final program design and implementation along with ideas for evolution should the Program continue into 2025.
- Areas to be targeted and the participation opportunity within those areas, including small business population, estimated participation, and energy-savings potential.
- Customer journey/experience including how Customers will be introduced to the program, how they will be supported, and their experience upon project completion. Consider providing a flow chart demonstrating how this will take place.
- Planned energy efficiency measures and/or services offered.
- Consideration of diversity, equity, and inclusion in program design ensuring all Customers can participate.
- Approach to coordination with other Implementers.
- Approach to coordination with community-based organizations and utilities.
- If Bidder proposes alternate offerings not covered in the core program scope or budget, details on those offerings and their associated launch timeline should be provided.

#### Customer Support

The Customer experience and Customer satisfaction are paramount to Focus on Energy's success. Often Customers will start with customer support teams, specifically customer service representatives. To provide a consistent experience across Focus on Energy, Implementers are required to use a Zendesk phone number for all public-facing communication requests. Customer service representatives are set up with Zendesk Talk and Chat access and are required to be logged in and available from 9 am to 5 pm CT Monday through Friday except for corporate holidays. Bidder should describe:

- Personnel structure within the call center(s), including geographic location(s) and an estimated number of customer support representatives.
- Call center capabilities including number and location of facilities, number of calls capable of handling (both inbound and outbound), and any non-English languages represented on the team.

- Strategy for handling backup or overflow calls.
- Recommended metrics to track outside the traditional number of calls and tickets handled, first response time, close rate, etc.

### Marketing

To ensure all Customers perceive Focus on Energy as a seamless set of offerings, marketing should focus on Customer type, technology, or service. All marketing materials should ensure the Focus on Energy brand is maintained and enhanced, and materials will be approved, by the Administrator, via a centralized system. In this section, please describe:

- Approach and capabilities to develop a market engagement plan to support program delivery including Customer participation.
- Customer or Trade Ally segments envisioned as targets and why.
- Strategies, messaging, and tactics used to reach Customers and/or Trade Allies.
- Approach to cross promoting other programs when applicable.
- How the success of proposed strategies will be tracked, evaluated, and measured.
- Where marketing staff assigned to the program will be based and as needed, their availability to meet directly with Administrator staff.
- Creative development and design capabilities, including ability to develop content for website, social channels, etc.

### Technical Assistance

Implementers provide Customers with assistance identifying and quantifying energy efficiency opportunities, applying for Incentives or rebates, and coordinating with Trade Allies and utility representatives. Bidders should describe:

- Approach to offering technical assistance to Customers.
- Qualifications of staff providing technical assistance.
- Other resources dedicated to providing technical support to Customers.

### Trade Ally Recruitment, Training, and Outreach

Trade Allies are a key delivery channel for the Program. Implementers collaborate with Trade Allies by providing regular program communication and ensuring they are informed and engaged. Implementers are expected to coordinate with each other to ensure consistent Program messaging and minimize Program points-of-contact. Bidders should describe:

- Previous experience managing Trade Ally relationships.
- Approach to ensuring an easy participation pathway for Trade Allies.
- Process for managing productivity, quality, and satisfaction of participating Trade Allies.
- Process for ensuring Trade Allies understand the entirety of Focus on Energy and view it as a seamless Program.

### Quality Assurance/Quality Control

QA/QC is a paramount component of program delivery as all operational stages. Bidders should describe how they maintain quality, including:

- Process/protocols employed to proactively identify and mitigate evaluation risk and prevent, detect, and resolve misconduct.
- Process for ensuring Customer eligibility.
- QA/QC relating to Incentive payment reviews, including documentation and project inspections (if applicable).

#### Incentive and Application Processing

Implementers are responsible for submitting all application data into the Focus on Energy Database. Data includes Customer, location, measure, Incentive, and Trade Ally information. Incentive payments are subject to QA/QC review to ensure all required documentation has been submitted, and Incentive calculations are correct. While the Implementers are responsible for processing applications, Incentive payments are issued by the Focus on Energy Fiscal Agent. All data collected by Implementers belongs to Focus on Energy and must be recorded in the Database. Bidder should describe:

- Controls in place to ensure accurate data entry and transfer to the database.
- Approach to maintaining a positive Customer experience, including minimizing Days Incentive Outstanding.
- Coordination with other Implementers to ensure timely payment is provided for complementary incentive offerings (if applicable)

#### Evaluation Support

Focus on Energy is evaluated by an independent third party, and Implementers are expected to actively participate in activities related to both impact and process evaluations. Key evaluation-related activities include:

- Participating in the TRM Management Committee to establish policy and requirements related to calculating energy savings.
- Developing measure workpapers based on sound engineering and research principles.
- Using evaluation findings to refine program design.
- Ensuring Evaluators understand and can appropriately evaluate program.

Bidder should describe their experience providing evaluation support for both process and impact evaluations, including:

- Approach to using evaluation findings to inform program design and operations.
- Program design strategies to minimize Free-Ridership.
- Experience working with evaluators to ensure they understand how to appropriately evaluate the program.
- Experience designing offerings that maximize net savings attributable to the presence of Focus on Energy, identifying key obstacles.
- Experience developing and applying technical protocols, qualified product lists, etc. and ensuring program operations are aligned.

#### **Task 3: Management and Oversight**

The Administrator emphasizes streamlining market delivery, reducing administrative costs, and maintaining high Customer satisfaction. Implementers with Subcontractors and Vendors

should consolidate management and oversight tasks under the prime Implementer, leaving Subcontractors to focus on implementation.

#### Budget Management and Forecasting

It is critical Implementers manage their budgets while achieving goals. Disruptions to the market can occur when budgets are not carefully managed and monitored and can have negative consequences to Trade Allies and Customers. Accurate forecasting, tracking, and reporting on budget spend and Key Performance Indicators (KPIs) and Performance Metrics are crucial to program success. All Implementers are expected to manage to the contracted budgets over the duration of the contract. Bidders should describe how they will:

- Develop forecasts, track performance to forecast, and make necessary adjustments.
- Monitor and respond to Incentive and non-incentive spending to meet market conditions.
- Provide examples of how program tactics could be adjusted to accommodate changes to program Performance Metrics and KPIs.

#### Tracking, Reporting, and Analytics

Data analytics are increasingly used to inform program delivery and development, as well as guide continuous improvement strategies. Effective data analysis allows Focus on Energy programs to quickly adapt to trends and orient the program delivery to meet changing market demands and embrace new opportunities. Bidder should provide detail on tracking and analytics offering insight on program performance beyond budget expenditures. This might include detail on market evolution, external stakeholders, and technology-based insights. Bidders should describe:

- Tracking and reporting on key program metrics and operational milestones.
- Establishing new performance metrics and milestones as needed.
- Tools, data sources, and metrics used to track performance.

#### Administration and Compliance

Implementers must comply with the Focus on Energy Policy Manual, Operational Procedures Guide, and their contracts. Implementers will be subject to compliance audits at the Administrator or PSC's discretion. Bidders should describe their compliance and risk mitigation capabilities related to fiscal management and information security including:

- Capabilities for ensuring costs are tracked and assigned appropriately.
- Approach to minimizing errors and associated administrative costs.
- Audits, such as Service Organization Controls (SOC) audits and other internal audits performed on a regular basis.

### **d. Cost Proposal**

Proposals must include implementation services costs, administrative support, Incentive reviews and approvals, QA/QC, project management, EM&V support, field resources, and ongoing program innovation and evolution. Bidders must provide all information below and for all proposed Subcontractors/Vendors, including the specific services to be provided and key staff allocated to working on Focus on Energy.

The cost effectiveness of the proposal will be determined using the Pricing Table in the Proposal Spreadsheet.

Bidders are encouraged to provide innovative and alternative proposals regarding pricing while adhering to the requirements of this RFP.

### **Price**

Bidders should propose a pricing structure for all services described in this RFP. A model with emphasis on compensation for performance is preferred but other models will be considered. Bidders should identify compensation linked to each of the performance metrics proposed in response to Section 5.

Budgets are provided in Section 5. Focus on Energy goals and budgets for Program Years 2023 through 2026 have not been finalized by the PSC and are subject to change. Any changes to allocations will be determined by the Administrator and based upon enhancing cost-effectiveness, meeting market demand, or other indicators as may be appropriate. Compensation may not exceed the total funding allocation as described in Section 5.

Additionally, Bidder should complete the Quad IV Summary tab in the Pricing Proposal Spreadsheet.

The selected Implementer will use the defined cost categories when forecasting and tracking expenditures:

- **Technical and Customer Support (T&CS):** Bidder should provide those costs directly associated with programmatic activities including implementation, Incentive reviews/approvals, QA/QC, project management, marketing, EM&V, customer support, etc. Subcontractors and/or Vendor costs should be included in T&CS. Focus on Energy does not allow mark-up on any Subcontractor or Vendor costs.
- **Marketing:** Bidder should provide those costs directly associated with marketing activities including things like collateral, memberships and sponsorships, and digital ad placement.
- **Administrative:** Bidder should provide those costs not directly associated with a specific programmatic activity but necessary to the development and administration of the program. Administrative costs include record keeping, payroll, accounting, auditing, billing, business management, budgeting and related activities, overhead allocation, and other costs necessary to direct the offering's organization but excluding evaluation.
- **Travel:** No reimbursement for any kind of travel expenses may be billed.
- **Incentives:** Bidder should provide estimated Incentive budgets. Incentives are a financial payment, product, or service provided to a Customer, Trade Ally, distributor, retailer, manufacturer, or designated payee, which enables or facilitates the implementation of an energy efficiency or renewable energy measure.

### **e. Qualifications**

Bidders must have the following minimum qualifications to be considered:

- Demonstrated experience with program implementation, oversight, design, marketing, and/or analysis related to similar types of energy efficiency and renewable resource programs.
- Demonstrated organizational, financial, data tracking, and reporting abilities.
- Demonstrated commitment to quality and Customer support.

### **Key Staff**

Bidders should provide details regarding key staff assigned to implementation and management activities, as well as startup and launch activities. Implementers should not change out key staff included in the bid proposal without advance written approval from the Administrator.

- Key staff are those allocated 50% or more to Focus on Energy, or are a manager, for at least six months of the year. Bidders must provide the names, credentials, and proof of experience of the key staff who are expected to be assigned to the project, along with their anticipated project roles and responsibilities. Bidders must discuss its capacity to adjust its staffing levels as needed to respond to Focus on Energy's evolving work scope, which may vary throughout the contract period.
- Provide a summary of the strengths and unique skills the key staff and management team, for both Implementer and Subcontractors/Vendors, will leverage to ensure the program is successfully and consistently implemented. Provide resumes for key personnel including relevant experience with time spent on the program and key projects relevant to the Focus on Energy work.
- Outline longer term staffing strategy for the program, including the expected number of field staff you plan to deploy and oversee, including any Subcontractors. Additionally, discuss your commitment to have dedicated Wisconsin-based staff working exclusively on Focus on Energy programs.

### **Diversity, Equity, and Inclusion**

The Administrator encourages Diverse Business Enterprises to submit proposals. Bidders should indicate if their organization is a Diverse Business Enterprise and list related certifications. Bidder should provide a summary of efforts and experiences in integrating diversity, equity, and inclusion internally in their organization, both in staffing and subcontracting for services.

### **References for Bidder and Proposed Subcontractor(s)**

Provide three client references from the past five years for the Bidder and two references for each proposed Subcontractor, including company name and contact information (name, title, phone number, and email). Additionally, Bidders should provide a brief description of the Bidder's and Subcontractor's services and how those services related to the work the Bidder proposes for each reference provided. Bidders should complete the "References" tab of the Proposal and Pricing Spreadsheet.

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## f. Administrative Documentation

### Conflict of Interest

All Bidders should review conflict of interest restrictions in Section 2.c. and disclose all affiliations or financial relationships with the Administrators, Fiscal Agent, Compliance Agents, SEERA members<sup>10</sup>, and PSC staff.

Bidders should disclose whether they are operating any energy efficiency or renewable resource programs in Wisconsin. For each program identified, Bidder should provide a short description of the program and identify the services and eligible measures and Incentives available through the program.

### Financial Requirements Documentation

Bidders are required to demonstrate and verify they have the financial resources and stability to perform the proposed work by providing documentation as described below.

- Last three years of audited financial statements for the organization and any significant Subcontractors, which should include a profit and loss statement, a cash flow statement, and a balance sheet (SEC form 10-k is acceptable).
- A nonpublic or nonprofit entity should provide adequate information comparable to the information required above allowing an assessment of financial status and capability to include, at a minimum, compiled statements prepared by a CPA.
- In the event a Bidder is forming a new organization to bid on this proposal, the Bidder should provide comparable documents from investors, partners, and/or principals.

### Affidavit of Non-Collusion

Pursuant to the Policy Manual, each Bidder, including the prime Implementer and all Subcontractors, should execute an Affidavit of Non-Collusion and submit it as part of the bid package.

## 7. Submittal Process

### a. Intent to Bid

Potential Bidders are required to submit an email notification of intent to submit a proposal in response to this RFP by Friday, August 12, 2022, at 11:59 pm CDT. The Bidder will receive a confirmation receipt. Submit an intent to bid to:

Email: [RFP@focusonenergy.com](mailto:RFP@focusonenergy.com)

Subject line: Intent to Bid: Community Small Business RFP

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<sup>10</sup> The SEERA members include representatives from various Focus on Energy participating utilities. The following utilities and entities are presently represented on the SEERA board: WEC Energy Group; St. Croix Natural Gas; North Central Power Company/Northwestern Wisconsin Electric; Superior Water, Light & Power; Consolidated Water Power Company; Xcel Energy; Madison Gas & Electric; and Alliant Energy.



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Bidders will provide a main contact person (name, address, phone, email). Any further communications about this RFP after this date will only go to Bidders who expressed an intent to bid.

**b. Submitting RFP Questions**

Any questions related to this RFP must be submitted via email by Friday, August 19, 2022, at 11:59 pm CDT. Submit RFP questions to:

Email: [RFP@focusonenergy.com](mailto:RFP@focusonenergy.com)

Subject line: RFP Questions: Community Small Business RFP

**c. Proposal Submission**

Proposals should be delivered in electronic format via email by Friday, September 2, 2022, at 11:59 pm CDT.

Email: [RFP@focusonenergy.com](mailto:RFP@focusonenergy.com)

Subject line: Proposal Submission: Community Small Business RFP

Proposals must be received by Focus on Energy by the time and date specified above.

**Requests for deadline extensions will be rejected, and no proposals will be accepted after the deadline.**

It is the Bidder's responsibility to ensure its proposal is received at the email address specified by the deadline for submission. Bidders will receive an email receipt of submission.

**d. Errors or Omissions**

A Bidder discovering an error or omission in its proposal may withdraw that response package and submit a revised version, provided it does so before the deadline for submission.

**e. RFP Updates**

Focus on Energy reserves the right to make changes or updates to this RFP. Any updates to this RFP will be communicated ONLY to prospective Bidders who have indicated their intent to bid.

**f. RFP Withdrawal**

Focus on Energy reserves the sole and absolute right to withdraw this RFP at any time before the duly authorized execution of the Agreement with Bidders for any reason, including, but not limited to, action that modifies or withdraws Focus on Energy funding. In its sole and absolute discretion, Focus on Energy may accept or reject all proposals and may accept a proposal that is not the most cost-effective proposal. Furthermore, Focus on Energy reserves the right to not select any proposals and to reissue a new RFP. Focus on Energy will not assume any liability, under any circumstances, to any Bidder submitting a proposal in response to this RFP.



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**g. Proposal Preparation Cost**

All Bidders accept all costs and/or expenses incurred prior to the duly authorized execution of the Agreement and may not seek reimbursement of any costs and/or expenses from Focus on Energy.

**h. Proposals Not Confidential**

Focus on Energy does not guarantee proposals will be kept confidential, including either the proposal submitted in response to this RFP or any Agreement arising from the solicitation. Specifically, Focus on Energy may submit Bidder proposals to SEERA or the PSC for review.

Furthermore, Focus on Energy will not assume any liability to a Bidder or other party as a result of any public disclosure of any proposal or the resulting Agreement.

However, Bidders will not be allowed to view other Bidders' proposals, in accordance with Section II of the Procurement Policy in the Policy Manual.

**i. Post-Proposal Contract Negotiation**

Focus on Energy expects to negotiate both price and nonprice factors separately, during any post-proposal negotiations with a finalist(s) but may not accept exceptions to flow down terms from the prime agreement with SEERA. Refer to Section 9 to view the general terms and conditions.

Bidder is instructed to identify any contract exceptions by denoting them in the Exceptions tab in the Pricing and Proposal Spreadsheet. Focus on Energy has no obligation to enter into negotiations or an Agreement with any respondent to this RFP and may terminate or modify this RFP at any time without liability or obligation to any Bidder.

## **8. Evaluation Selection Criteria**

**a. Evaluation Committee**

Accepted proposals will be reviewed by an evaluation committee and scored against the stated evaluation criteria. The evaluation committee will consist of representatives from the Administrator, SEERA, and the PSC. A Bidder may not contact any member of the evaluation committee in regard to its proposal until awards are announced.

**b. Minimum Threshold Criteria**

A Bidder must meet the following threshold criteria for its proposal to be considered:

- The proposal must contain all information required in this RFP (see Proposal Checklist).
- Bidding teams must have sufficient financial strength to successfully implement the proposed program.

Submitted proposals will be preliminarily reviewed to determine if minimum threshold criteria are met, as detailed above. Failure to meet threshold criteria may result in rejection of the proposal.

If all Bidders do not meet one or more of the minimum threshold criteria, the evaluation committee or Administrator reserves the right to continue the evaluation of proposals and to select the proposal most closely meeting the requirements specified in this RFP.

### c. Evaluation Criteria

Proposals will be scored by each member of the evaluation committee using a scorecard with the criteria detailed below. Bidders should specifically address these criteria in the relevant sections of their proposals.

Scoring Criteria	Weight
Implementation Approach	25%
Task 1: Start-Up and Launch	10%
Task 2: Delivery	25%
Task 3: Management and Oversight	15%
Cost Proposal	10%
Qualifications	15%

Scoring criteria directly correlates to the subsections of Section 6: Bidder Proposal Instructions and Requirements, and responses will be evaluated based on quality, efficiency, and level of detail in addressing the questions posed in each subsection.

### d. Evaluation Process

The evaluation committee's scoring will be tabulated, and proposals will be ranked based on the numerical scores received. The evaluation committee reserves the right to contact references and/or request interviews with Bidders. A combination of the scores received for the proposal, results of the interview, and Bidder reference checks will be considered when awarding contracts.

### e. Proposal Review/Clarifications

The evaluation committee may perform clarification interviews or request clarification in writing. A clarification interview may be performed via telephone and will focus on the information set forth in the proposals. It will not offer Bidders the opportunity to revise their proposal. Bidders will not be compensated for the time spent or the costs incurred for the interview(s) or for responding to a request for clarification.

## 9. Agreement General Terms and Conditions

Refer to [focusonenergy.com/about/rfp](https://focusonenergy.com/about/rfp).

## **10. Appendices**

- A. Proposal Checklist**
- B. Affidavit of Non-Collusion**
- C. Proposal and Pricing Spreadsheet**

## APPENDIX A - Proposal Checklist

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Bidders shall submit proposal in the format outlined below and as detailed in Section 6, *Bidder Proposal Instructions and Requirements*. A copy of this checklist shall be provided with each proposal submission. The checklist will not be counted toward the maximum page limit.

1. Cover Letter

2. Executive Summary

### **Implementation Approach**

Team Structure—Org Chart and definition of services

Strategy and Vision

Task 1: Start-up and Launch

Key Activities and Milestones

Timeline

Risk Mitigation Plan

Task 2: Delivery

Key Program Design Elements (8 elements)

Customer Support (4 elements)

Marketing (7 elements)

Technical Assistance (3 elements)

Trade Ally Recruitment, Training and Outreach (4 elements)

Quality Assurance/Quality Control (3 elements)

Incentive and Application Processing (3 elements)

Evaluation Support (5 elements)

Task 3: Management and Oversight

Budget and Savings Management and Forecasting (3 elements)

Tracking, Reporting, and Analytics (3 elements)

Administration and Compliance (3 elements)

Task 4: Innovation and Pilots (4 elements)

**Cost Proposal** - Refer to Section 6(d) for requirements

Complete the Quad IV Summary tab in the Excel Pricing Proposal Spreadsheet (see Appendix C and [website link](#))

## APPENDIX A - Proposal Checklist

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- Qualifications**
- Experience
- Key Staff
- Diversity, Equity & Inclusion
- References – *complete the “References” tab in the Excel Pricing Proposal Spreadsheet*
- Administrative Documentation**
- Conflict of Interest Disclosure – *Refer to Conflicts of Interest tab in the Excel Pricing Proposal Spreadsheet*
- Financials
- Affidavit of Non-Collusion – *see Appendix B*

## APPENDIX B – AFFIDAVIT OF NON-COLLUSION



\_\_\_\_\_, “Bidder”

State of \_\_\_\_\_) SS

County of \_\_\_\_\_)

\_\_\_\_\_, being first duly sworn, says:

In signing this bid, the undersigned affirms that they are a duly authorized representative of the Bidder submitting the competitive bid attached to this statement. The undersigned also affirms that neither they nor the Bidder nor any of the Bidder’s employees, agents, or assigns has, either directly or indirectly, entered into any agreement, prepared this bid in collusion with any other party, or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a bid; that this bid has been independently arrived at without collusion with any other Bidder, competitor or potential competitor; that the contents of this bid have not been knowingly disclosed or communicated by any employee or agent prior to the opening of bids to any other Bidder or competitor or any other person engaged in this type of business; and that the above statement is accurate under penalty of perjury.

### CERTIFICATE OF ACCURACY

I hereby certify that the information contained herein is true and correct to the best of my knowledge, information, and belief.

\_\_\_\_\_  
Signature (Authorized Agent)

Signed and sworn to before me

on \_\_\_\_ day of \_\_\_\_\_, 2022.

\_\_\_\_\_, Notary Public

My commission expires \_\_\_\_\_, 20\_\_\_\_.

(Seal)

## APPENDIX C – PROPOSAL PRICING SPREADSHEET

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SEE BELOW FOR THE PROPOSAL PRICING SPREADSHEET

<https://www.focusonenergy.com/about/rfp/SB-Pricing-Proposal>

RETURN THE FILE IN NATIVE FORMAT TO THE ADMINISTRATOR