



White River Valley Electric Cooperative

REQUEST FOR PROPOSALS

Home Energy Reporting Program

RFP Number: 1

Make all inquiries and send all questions to:

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Proposal Submission Deadline:

[August 23, 2010](#)

1. Purpose

The purpose of this RFP is to obtain proposed pricing, alternatives, and options to provide White River Valley Electric Cooperative (WRVEC) with a Home Energy Reporting Program.

2. Background

WRVEC is participating in the Missouri- Department of Natural Resources: Energize Missouri Homes, “Neighborhood Challenge” Program. The objective of the Neighborhood Challenge Program is to encourage participating homeowners to voluntarily reduce their energy use by providing them with information regarding how their usage compares to that of other program participants. The purpose of comparing program participants’ energy usage is to create a competitive atmosphere with the intended effect of increasing energy savings.

3. Introduction

WRVEC desires to contract with a Company that offers expertise in Home Energy Reporting Programs which:

- 1) Motivate targeted households to become more energy efficient, delivering energy efficiency savings of more than 1% over a 1-year period
- 2) Drive increased adoption of other WRVEC energy efficiency and demand-response programs
- 3) Increase customer satisfaction with WRVEC

4. Program Objectives

In evaluating the Company’s ability to deliver on the above objectives, WRVEC will assess the Company’s demonstrated capability to drive energy-efficiency savings, customer engagement, and action on a large scale, irrespective of customers’ technology access, socio-economic status, age, and other demographic factors. WRVEC desires to achieve energy-efficiency savings of at least 1% among households participating in the program.

In addition, WRVEC will assess the Company’s ability to increase participation in WRVEC’s programs, services, and rebates. WRVEC requires that the results of this program can be evaluated, measured, verified, and used to recover the costs of the program.

5. Scope of Services

To achieve the program objectives, WRVEC requires the Company to utilize a turn-key Home Energy Reporting Program that can be rapidly implemented with low risk. This solution will: 1) employ a proactive customer-engagement approach; 2) use deep, data-driven energy usage and customer profile analysis; and 3) include practical application of behavioral science. WRVEC desires a solution that has been field-tested and verified to be highly effective.

Reaching customers and driving them to take action requires a strategy that engages customers proactively by leveraging a multitude of channels, including direct mail, the Internet, e-mail, etc.

Strategies and approaches that only utilize digital media will not suffice for effective customer engagement; WRVEC requires a solution that includes direct mail as a key component.

5.1. General Requirements

WRVEC expects the Company to develop, implement, and manage a turn-key Home Energy Reporting Program, encompassing all functionality and services contemplated in this RFP, which can be implemented rapidly and with low risk through a Software-as-a-Service approach. The solution must not require installation within WRVEC's information technology environment or require technical integration with WRVEC systems. The Company must:

- Provide a true multi-channel platform—all channels (print, Internet, etc.) shall provide a unified customer experience and the information presented must be consistent between web tools and non-web tools
- Incorporate, at a minimum, the following direct engagement channels in the Company's solution to reach customers:
 - Direct mail
 - Customer portal (web-based)
 - E-mail
 - Customer service and administrative portal (web-based)
- Have the capability to provide complementary energy-efficiency messaging through:
 - Short Message System (SMS)
 - Integrated Voice Response (IVR)
- Motivate customers to save energy and money through the use of applied behavioral science and targeted consumer marketing techniques
- Promote and drive participation in WRVEC energy-efficiency and demand-response programs, services, and rebates through the use of targeted marketing techniques
- Increase customer satisfaction with WRVEC
- Deliver solution on behalf of WRVEC, under WRVEC's branding
- Utilize WRVEC customer account and energy usage data
- Utilize data from additional sources, acquired by the Company, to complement WRVEC's data
 - The Company must identify the sources it intends to use for third-party data
- Use an opt-out, experimental program design, allowing for measurable and verifiable energy savings
- Monitor and report program performance on a periodic basis
- Provide sub-segmentation analysis of participating customers to better understand how different customer segments are responding to the program

5.2. Direct-Mailed (Paper) Energy Comparison Reports

The Company must regularly deliver customized, direct-mailed energy comparison reports that motivate customers to take action through: 1) contextualized energy-usage information, 2) personal and neighborhood comparisons, and 3) energy savings recommendations based on customers' specific energy-usage patterns and characteristics. Energy comparison reports must work seamlessly with the

customer portal and other digital engagement tools (e.g., email, SMS) to reinforce messaging and drive customer action. Reports must include:

- Contextualized energy usage information (including normative comparison of customer’s energy use to a relevant peer group) and energy-efficiency recommendations that apply the principles of behavioral science
- Personal comparison of energy usage year over year
- Updates on customer’s progress towards personal energy-efficiency goals
- Consistently relevant information reflecting changes in the customer’s environment or customer’s account (e.g., seasonal changes, updates to customer accounts, etc.)
- Personalized and targeted recommendations based on customer characteristics, actions, and time of year, including:
 - Programmatic recommendations: promotion of WRVEC energy-efficiency programs, services, and rebates that help customers save energy and save money
 - Behavioral recommendations: energy-saving actions that customers can take independently to reduce consumption

The Company must have at least 100 already-developed tips and recommendations, based on best practices from other utilities, as part of the proposed solution.

- Dynamic, customizable, and fresh report content designed to keep customers engaged over program life

The Company must have a demonstrated ability to successfully print and deliver a high volume of individualized reports, securely and reliably. Reports must be produced using 30% post-consumer recycled paper.

5.3. Customer Web Portal

WRVEC must deliver a customer web portal that motivates customers to take action with interactive access to: 1) energy-usage information, 2) personal and neighborhood comparisons, and 3) energy savings recommendations based on energy usage patterns. The customer web portal must be available 24 hours a day, seven days a week, and work seamlessly with other customer engagement tools (e.g., energy comparison reports, IHDs, etc.) to reinforce messaging and drive customer action. The customer web portal must provide:

- Deep, data-driven energy usage presented through practical application of behavioral science, including normative comparison of customer’s energy use to an individually selected peer group
- Customer energy action plan setting and tracking capability to show customers how they are progressing toward personal energy-efficiency goals
- Information that is consistently relevant, reflecting changes in the customer’s environment or customer’s account (e.g., seasonal changes, updates to customer accounts, etc.)
- Energy spending presentment
- Personalized and targeted recommendations based on customer characteristics, actions, and time of year, including:

- Programmatic recommendations: promotion of WRVEC energy-efficiency programs, services, and rebates that help customers save energy and save money
- Behavioral recommendations: energy-saving actions that customers can take independently to reduce consumption
- Bill comparisons which identify and explain the difference between successive bills
- Self-service account provisioning, access, and customer configuration
- Customer education, including a comprehensive online archive of energy-usage recommendations, FAQ, technology education, etc.
- Ability for customers to learn from other customers through message boards, rating systems, etc.
- Quick, easy energy-efficiency audit capability that is a seamless part of the user experience, providing detailed feedback and recommendations based on customer input
- Ability to alert customers to take action:
 - WRVEC alerts: customer notification based on WRVEC-defined events
 - User-defined alerts: customer notification based on customer requests for action step reminders
- Ability to export any portal view for printing purposes
- Ability for customers to opt-into “paperless” reporting, where e-mail notifications are sent in lieu of direct-mailed energy comparison reports

5.4. Web Customer Service Interface

The Company must provide a web customer service interface that enhances the role of WRVEC’s customer care center as a customer engagement channel. The customer service interface will bolster customer satisfaction and assist customers with questions they have regarding the Home Energy Reporting Program. The web customer service interface must enable WRVEC customer service representatives to:

- View and update customer profiles and report delivery preferences
- Easily review and track changes made to customer profiles in a history table
- Access full copies of energy comparison reports and e-mail notifications
- Perform web masquerading, allowing customer service representatives to log into customer web session to “see what the customer sees”
- Opt customers out of the program if requested

In addition, the Company will provide comprehensive CSR preparation, through a train-the-trainer approach, to help CSRs manage the typical customer experience and fully utilize the web customer service interface, supporting first-call-resolution and short handle times.

5.5. Additional Customer Engagement Channels

Discuss if the Company has the capability to support and interface with additional engagement channels such as Short Message Systems (SMS) and Integrated Voice Response (IVR) systems to reach customers.

Explain how these or other channels will be integrated with the Company's solution and the benefits they may provide.

5.6. Information Security

Information must be secured through:

- A SAS-70 Type II data storage facility
- Information security and disaster recovery protocols
- Secure data storage, transfer, and disposal standards
- Malware security
- Identity and access management control policies
- Detection, monitoring, and logging for the Company's operational support tools

6. Proposal Requirements

1. Cover Letter identifying the company contact (with contact information) and acknowledgement of any RFP amendments that were issued [1 page]
2. Executive Summary [3 pages]
3. Company Profile [1 page]
 - a. Describe the Company's business and background, including the size, location, capacity, type of firm, and year established. Describe the company's structure, including an organizational chart, which illustrates leadership and roles.
 - b. Include a Company financial statement that provides a third-party audit and overview of cash flow.
 - c. Provide a list of entities with which the Company has relationships that create, or appear to create, a conflict of interest with the work that is contemplated in this request for proposals. The list should indicate the name of the entity, the relationship, and a discussion of the conflict.
4. Customer Engagement Strategy
 - a. Describe the Company's methods and technical tools used to reach customers, and explain how the Company's solution encompasses all functionality contemplated in *Section 5, Scope of Services*.
 - b. Identify the Company's approach to measuring and verifying (M&V) value delivered. The Company shall use statistically sound methodologies to design a test and control structure for WRVEC that will enable conclusive understanding of program results over time.
 - i. Results must be calculated with a confidence level of 95% and a margin of error of no more than + or -1%.
 - ii. Provide copies of at least three independent evaluations of results and measurement and verification approach.
5. Experience
 - a. Describe the Company's experience delivering at least three programs of similar size and complexity to WRVEC's program (including both direct-mail and online channels), each serving a minimum 100,000 customers.

- b. Describe the Company’s experience sustaining program results for over 1 year.
 - c. Describe the Company’s experience incorporating AMI data into Home Energy Reporting Programs for at least two other programs.
 - d. Provide at least three client references for programs of similar scope and complexity.
6. Program Approach
- a. Provide an overview of the Company’s program design, and how it best meets WRVEC’s goals and objectives.
 - i. Indicate the program population and any consumer targeting recommendations for achieving the best program results.
 - ii. Fully describe the deployment methodology you intend to use to provide the program and the timeline in which you anticipate the program to be executed.
 - b. Provide the program team’s qualifications.
 - i. Org chart: identify all key program team members and their program roles.
 - ii. Identify the project manager’s experience. This project manager should have experience working on at least three projects of similar scope and complexity.
 - iii. Role responsibility: describe the key program team member’s role responsibilities for WRVEC’s program.
 - iv. Resumes for all key program team members.
7. Pricing
- a. The proponent should list the first costs of a turn-key solution for a total of 12 months. Please breakdown total price, in a lump sum format, by year. For bidding purposes, the program population should be as follows:

Year	Number of Households
1	20,000

7. Selection Criteria

WRVEC staff will evaluate the proposals provided based on the following criteria:

Company Experience	30%
Customer Engagement Solution	30%
Program Approach	30%
Price	10%
Total	100%

Points may be amended and a proposal may be rejected based on whether the bid is credible to provide these services in a timely and professional manner.

8. Questions

All questions concerning this RFP should be submitted by e-mail to [\[Brian Coleman\]](mailto:bcoleman@whiteriver.org) at bcoleman@whiteriver.org.

Other WRVEC personnel are not authorized to discuss or answer questions about this RFP with responders. Contact regarding this RFP with any personnel not listed above could result in disqualification.

All questions regarding this RFP must be received no later than [\[5:00 p.m. CST\]](#), [\[Monday\]](#), [\[August 23, 2010\]](#).

9. Timeline & Due Dates

The RFP timeline is as follows:

RFP Issued	[August 10, 2010]
Deadline for questions, clarifications	[August 16, 2010]
Proposals Due	[August 23, 2010]
Finalist Identified	[August 24, 2010]
Vendor Selection and Contract Preparation	[August 24, 2010]
Contract Awarded	[September 6, 2010]
Work Commences	[September 7, 2010]

10. Submitting the Proposal

For consideration in this funding round, the proposal must follow the specified deadlines and format provided in this RFP (see RFP sections on Timelines & Due Dates, Proposal Requirements, and Submitting the Proposal). The proposal is considered “submitted” when the electronic proposal is delivered as a PDF document to bcoleman@whiteriver.org with “[RFP](#)” in the subject line of the e-mail.

11. Terms and Conditions

1. WRVEC reserves the right to amend or cancel this RFP at any time if the best interest of WRVEC requires such action.
2. WRVEC reserves the right to reject any or all proposals and to waive informalities and minor irregularities in proposals received and to accept any portion of a proposal if deemed in the best interest of WRVEC.
3. WRVEC assumes no liability in any fashion with respect to this RFP or any matters related thereto. All prospective service providers and their assigns or successors, by their participation in the RFP process, shall indemnify, save and hold WRVEC and its employees and agents free and harmless from all suits, causes of action, debts, rights, judgments, claims, demands, accounts, damages, costs, losses and expenses of whatsoever kind in law or equity, known and unknown, foreseen and unforeseen, arising from or out of this RFP and/or any subsequent acts related thereto, including but not limited to the recommendation of a service provider and any action brought by an unsuccessful prospective service provider.

12. Oral Interviews

Proposers may be required to participate in an oral interview. The oral interview will be a panel comprising members of the selection committee.

13. Notification of Award

Responders will be notified whether they are selected to provide the expertise and services requested within this RFP. Awards are contingent on available funding and the Company's successful execution of a contract agreement within the specified timeframe.

14. Term of Contract

The term of the contract shall extend from the date of execution by WRVEC for a period of 1.5 years.

15. Non-conforming Proposal

A proposal shall be prepared and submitted in accordance with the provisions of these RFP instructions and specifications. Due to the need to deploy this program quickly, experience with deploying similar programs is a critical criterion to determining whether a proposal is considered by WRVEC to be credible. Any alteration, omission, addition, variance, or limitation of, from, or to a proposal may be sufficient grounds for non-acceptance of the proposal, at the sole discretion of WRVEC. WRVEC shall have full discretion as to whether a bid is credible.