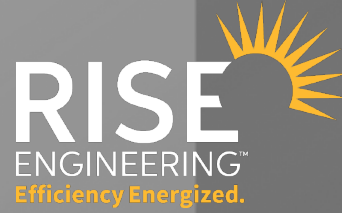


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# MASS SAVE 2025 RFQ INFORMATIONAL CALL

APRIL 2025

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# Call Structure

- Duration: 40-60 min presentation
- Call will be recorded and posted to the website
- All mics are muted
- Questions should be sent in via the RFQ website or sent to the RFQ inbox:
  - [www.wxpricebidding.com](http://www.wxpricebidding.com)
  - [MassSaveRFQ@therisegroupinc.com](mailto:MassSaveRFQ@therisegroupinc.com)
- Answers will be posted to the Q&A page on the website

# Today's Agenda

- Background on Weatherization Program Evolution
- 2025 RFQ Overview
  - Goals
  - Impact
- 2025 RFQ Process
- IIC Work Allocation
- HPC Customer Acquisition Fee
- RFQ Schedule

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# BACKGROUND ON THE RFQ

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# Purpose of a RFQ Process

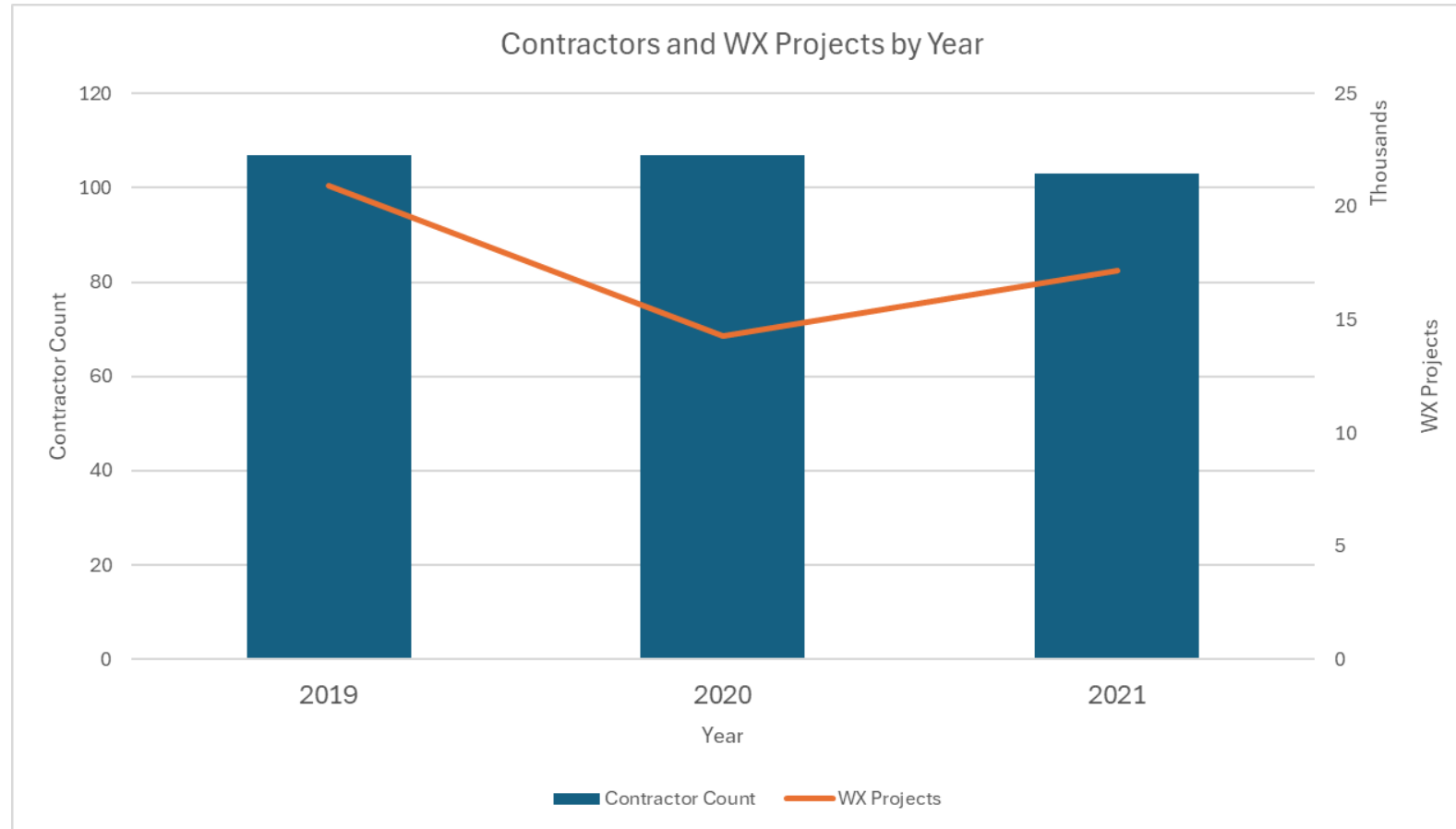
- Uses market information to determine pricing
- Competitive pricing supports greater volume of work
- Consistency with procurement practices across program portfolio

# Weatherization Program Pricing History

- Pre – 2022
  - Price Setting Mechanism -
    - Initially, pricing was set by a formal RFP process, with Lead Vendors responding and acting in a traditional General Contractor model
    - In the next iteration, pricing was set by negotiations with members of the BPWG, usually facilitated by each Lead Vendor. This resulted in different pricing across Lead Vendors and Program Administrators
  - Objective -
    - Ensure sufficient contractor capacity to meet expanding goals
    - Encourage creation of a weatherization industry

# Weatherization Market History

- **Pre-2019** – Market demand and IIC capacity largely in balance – sufficient utilization rates among IICs to support program demand.
- **2020** – COVID-19 driven volume downturn
- **2021**- Limited rebound from COVID, driven significantly in part by 100% weatherization incentives



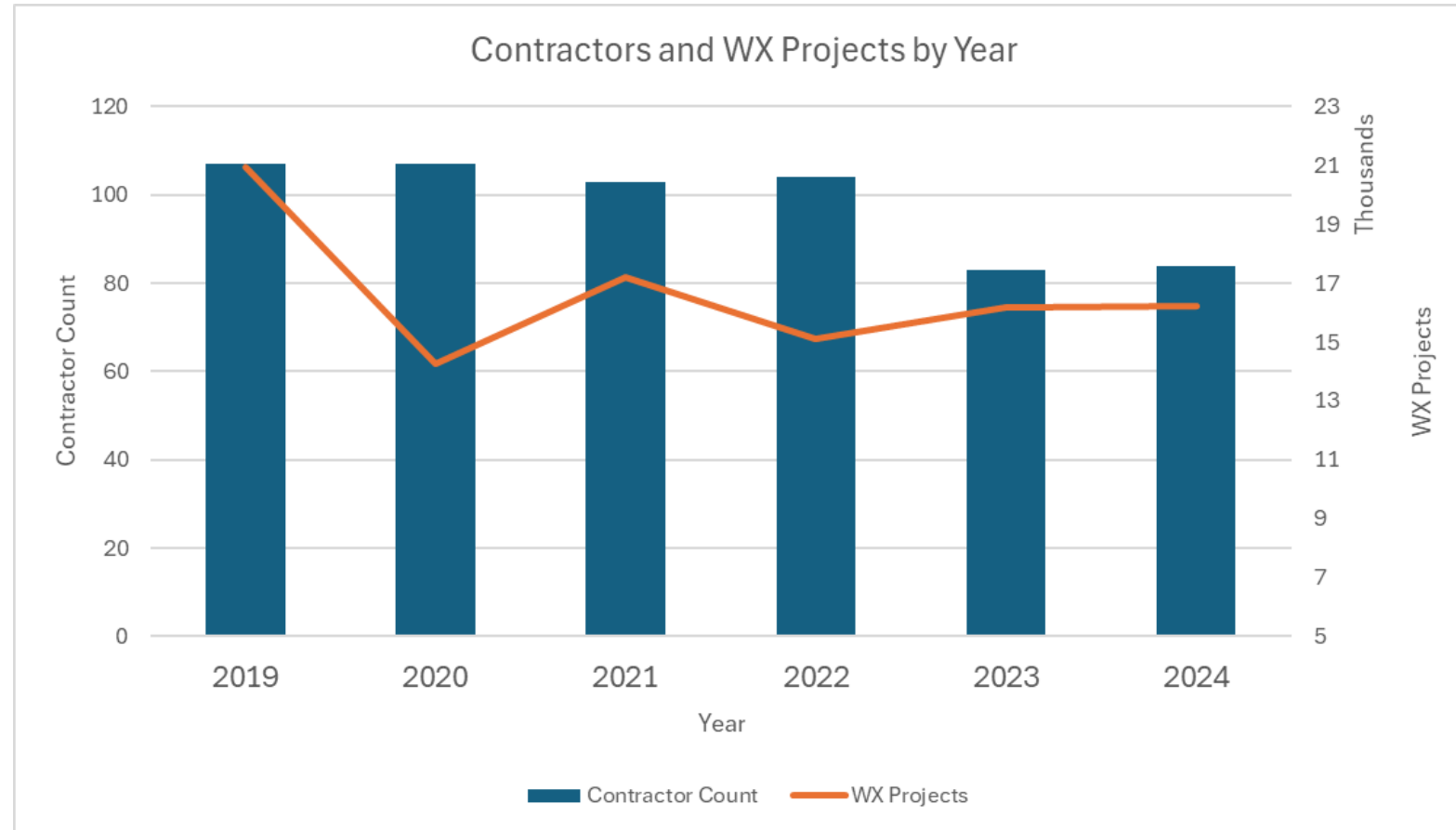
# RFQ Process 2022-2024

- 2022-2024
  - Price Setting Mechanism – Established and launched RFQ process with bid results factored into work allocations
  - Objective
    - Price discovery from established community of contractors
    - Maximize cost efficiency of programs, drive demand through limiting participating customer co-pays, limit budget / EE surcharge impacts on all customers
    - Encourage and reward cost-efficiency among contractors



# Current State of the Market

- Market demand failing to keep pace with IIC capacity
- Utilization rates for existing IICs are lower than anyone would like



\* Contractor decline between 2022 – 2023 is due to compliance related terminations.

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# 2025 RFQ GOALS AND IMPACT

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# 2025 RFQ - Objectives

- Right-size IIC capacity to current (and likely near-term future) market demand through limiting allocations to most competitive bidders
- Maintain a sustainable universe of most cost efficient IICs, supported by higher utilization rates
- Remove bid scores from work allocation methodology for those IICs whose bids make them eligible to receive work allocations
- Maintain participation pathways for IICs who can generate their own work
- Establish annual cadence for re-running RFQ process in order to re-set prices and allocation-eligible pool of IICs

# 2025 RFQ - Impact

- Not all bidders will continue to receive work allocations – pool of IICs receiving work allocations will be limited to the most competitive bidders up until zone-specific anticipated capacity needs have been met
- Those IICs who do remain eligible to receive work allocations from program will receive those allocations on the basis of historical methodology – bid scores will not factor into the ranking of contractors in the allocation pool
- IICs who are not selected for work allocation will remain eligible to perform work under Direct Weatherization/ECR/PCR/Customer Request pathway and will have opportunity to participate in future RFQs
- Any Contractor who completes weatherization work for a qualified referred customer will receive a Customer Acquisition Fee

# Feedback from Contractor Listening Sessions

Contractor Concern	Key Take Away
Bid Process Shouldn't affect Contractor Grade Score	Bid Score no longer included in Contractor Grade Scoring
Competitive pricing discourages long-term viability of contractor businesses	Competitive procurement is a critical tool to balance supply and demand (and support long-term contractor margin) Supports efficient use of customer dollars and program longevity
Bid process should reward longevity	Longevity is not a determining factor in competitive procurement
Contractor quantity/capacity exceeds program needs	Contractor bid results will determine inclusion in Work Allocation system.
Spread between largest and smallest HPC Customer Acquisition Fee was too great	Reduced the spread across all HPCs
HPCs wanted increased compensation based on size (both small and large HPCs sought increases)	There was no logical volumetric component that added to the competitive nature of the process

# Additional Contractor Resources

- Other Mass Save Programs
- Training Opportunities
- Other Work Streams
  - Heat Pump Installation
  - Barrier Clearing

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# 2025 RFQ PROCESS

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# Who Can Bid?

- The RFQ is open to all program participating IICs and HPCs in the Mass Save Residential Turnkey Services (RTS) program for single (1-4) family homes working on behalf of Eversource and National Grid
- All contractors must have an "In-Good-Standing" active contractor status in the program at the time that bid submissions are due.



# What Are You Bidding On?

- IICs will be bidding on:
  - All current weatherization measure prices
    - Selected Bids will inform the set price at which contractors will install each measure by taking the average of all accepted bids.
  - Allocation eligibility
- HPCs will be bidding on:
  - All current weatherization measure prices
    - Accepted Bids will inform the set price at which contractors will install each measure by taking the average of all accepted bids.
  - Relative bid rank will determine each HPCs' Customer Acquisition Fee

# Calculation of Bid Rank

- Each Contractor will receive a rank amongst their peers, IIC to IIC and HPC to HPC.
  - The volume of installed measures from January 2024 through December 2024 will be used to establish the total program spend, or baseline.
  - A contractor's bid price for each measure will be applied to that same quantity of installed measures and the resulting sum will determine what the program spend would have been if that contractor's bid prices were used.
  - Contractors will then be ranked according to what percentage their bid would increase or decrease the total spend baseline. Lower bids will be ranked above higher bids in order from first to last amongst all IICs and HPCs.
    - Non-Bidders will not be ranked.

# How Are Prices Set?

- All selected bids\*, on a measure-by-measure basis, will be averaged to set the standard pricing for all contractors (HPC & IIC) and customers.
- \*Selected Bids:
  - All HPCs
  - All IICs that were awarded Work Allocations in at least 1 zone
- The Requesters reserve the right to accept or reject any or all bids and determine final measure prices in the best interest of the program, if necessary.

# How Do You Bid?

- Use the link provided to you in the invite
  - [www.wxpricebidding.com/](http://www.wxpricebidding.com/)
- Download and review each document thoroughly
- Complete required documentation as prompted
- Upload your pricing spreadsheet and Capacity/Zone spreadsheet
- Click submit
- Emailed, faxed, or mailed quotations will not be accepted

# Program Spend by Category

- The Program Spend by Category list indicates the category/area of the home for all measures installed by Contractors for the period of January 2024 to December 2024 as a percentage of total program spend.
- Contractor bids are ranked based on their impact to the overall program spend.
- The Program Spend by Category list can also be found in the bid packet on ATTACHMENT 7

Category	% of Annual Spend
Attic	30.75%
Wall	25.22%
Air Sealing	14.89%
Kneewall	8.77%
Optional	4.30%
Ventilation	3.78%
Crawlspace	3.77%
Basement	2.73%
Other	2.30%
Garage	1.42%
Access	1.14%
Overhang	0.55%
Open Wall	0.37%

# Top 75 Measures by Program Spend

- The Top 75 Measures by Program Spend list indicates the top measures that have been installed by Contractors for the period of January 2024 to December 2024. The measures are in no particular order and the "ID" does not reflect a particular Measures Usage.
- The Top 75 Measures by Program Spend list can be found in the bid packet on ATTACHMENT 7

Instructions
The list below indicates the Top 75 Measures that have been installed by Trade Allies for the time period of January 2024 to December 2024. The measures are in no particular order and the "ID" does not reflect a particular Measures Usage, however, it does match the "ID" as listed on the Submission Template.

ID	Category	Description	Unit Type
2	Access	Door Thermal Barrier Polyiso 2" (Attic)	Each
3	Access	Hatch Thermal Barrier Polyiso 2 inch (Attic)	Each
6	Access	Temporary Access	Each
7	Air Sealing	6 mil Poly Vapor Barrier	Sq Ft
8	Air Sealing	Door Sealing	Each
9	Air Sealing	Exterior Door Weather Stripping	Each
10	Air Sealing	Perform Air Sealing at Estimated 62.5 CFM50 Per Hour	Per Hour
11	Air Sealing	Transition Air Sealing	Linear Foot
15	Attic	Attic Floor Enclosed Cellulose Dense Pack 6"	Sq Ft
17	Attic	Attic Floor Enclosed Cellulose Dense Pack 8"	Sq Ft
23	Attic	Attic Floor Open Blow Cellulose 4"	Sq Ft
24	Attic	Attic Floor Open Blow Cellulose 5"	Sq Ft
25	Attic	Attic Floor Open Blow Cellulose 6"	Sq Ft
26	Attic	Attic Floor Open Blow Cellulose 7"	Sq Ft
27	Attic	Attic Floor Open Blow Cellulose 8"	Sq Ft
28	Attic	Attic Floor Open Blow Cellulose 9"	Sq Ft
29	Attic	Attic Floor Open Blow Cellulose 10"	Sq Ft
30	Attic	Attic Floor Open Blow Cellulose 11"	Sq Ft
31	Attic	Attic Floor Open Blow Cellulose 12"	Sq Ft
32	Attic	Attic Floor Open Blow Cellulose 13"	Sq Ft
33	Attic	Attic Floor Open Blow Cellulose 14"	Sq Ft
34	Attic	Attic Floor Open Blow Cellulose 15"	Sq Ft
40	Attic	Attic Slope Enclosed Cellulose Dense Pack 6"	Sq Ft
42	Attic	Attic Slope Enclosed Cellulose Dense Pack 8"	Sq Ft
45	Attic	Attic Stair Cover Thermal Barrier	Each
46	Attic	Attic Stair Tent Cover	Each
47	Attic	Install 2" Thermal Barrier Polyiso On Open Gable Wall	Sq Ft
49	Attic	Install 6" Fiberglass Battling In Open Attic Floor	Sq Ft
50	Attic	Install 9" Fiberglass Battling In Open Attic Floor	Sq Ft
71	Attic	Recessed Light Enclosure	Each
75	Basement	Install 6" Fiberglass Battling In Open Basement Ceiling	Sq Ft
76	Basement	Install 9" Fiberglass Battling In Open Basement Ceiling	Sq Ft
77	Basement	Insulate Rim Joist With 2" Thermal Barrier Polyiso	Sq Ft
78	Basement	Insulate Rim Joist With 6.25" Fiberglass Battling	Sq Ft
98	Crawlspace	Install 2" Thermal Barrier Polyiso On Open Crawlspace Ceiling	Sq Ft
102	Crawlspace	Install 6" Fiberglass Battling In Open Crawlspace Ceiling	Sq Ft
103	Crawlspace	Install 9" Fiberglass Battling In Open Crawlspace Ceiling	Sq Ft
104	Optional	1 Hour Dart Sealing	Each

ID	Category	Description	Unit Type
111	Garage	Dense Pack 8" Cellulose In Garage Ceiling	Sq Ft
113	Garage	Dense Pack 10" Cellulose In Garage Ceiling	Sq Ft
137	Kneewall	Install 2" Thermal Barrier Polyiso On Kneewall	Sq Ft
138	Kneewall	Install 2" Thermal Barrier Polyiso on Open Kneewall Slope	Sq Ft
139	Kneewall	Install 3" Fiberglass Battling In Open Kneewall	Sq Ft
147	Kneewall	Install 6" Fiberglass Battling In Open Kneewall Slope	Sq Ft
153	Kneewall	Kneewall Floor Enclosed Cellulose Dense Pack 8"	Sq Ft
176	Kneewall	Kneewall Slope Enclosed Cellulose Dense Pack 6"	Sq Ft
187	Open Wall	Install 2" Thermal Barrier Polyiso on Open Wall	Sq Ft
194	Other	Damming	Linear Foot
195	Other	Insulation Removal	Sq Ft
203	Overhang	Dense Pack 10" Cellulose In Overhang	Sq Ft
209	Overhang	Insulate Overhang With 2" Thermal Barrier Polyiso	Sq Ft
211	Ventilation	12" Mushroom Vent	Each
214	Ventilation	Install Aluminum Soffit Vent	Each
215	Ventilation	Install Shingle Over Ridge Vent	Each
216	Ventilation	Install Turbine Roof Vent	Each
217	Ventilation	Proparent 2' or 4'	Each
220	Ventilation	Vent Bath Fan to Roof or Other	Each
222	Optional	Insulate 3rd Fl. Aluminum Sided Wall With 4" Dense Pack Cellulose	Sq Ft
252	Wall	Insulate 3rd Fl. Vinyl Sided Wall With 4" Dense Pack Cellulose	Sq Ft
258	Wall	Insulate 3rd Fl. Wood Shingle Sided Wall With 4" Dense Pack Cellulose	Sq Ft
269	Optional	Insulate Aluminum Sided Wall With 3" Dense Pack Cellulose	Sq Ft
270	Optional	Insulate Aluminum Sided Wall With 4" Dense Pack Cellulose	Sq Ft
276	Optional	Insulate Asbestos Sided Wall With 4" Dense Pack Cellulose	Sq Ft
287	Wall	Insulate Clapboard Sided Wall With 3" Dense Pack Cellulose	Sq Ft
288	Wall	Insulate Clapboard Sided Wall With 4" Dense Pack Cellulose	Sq Ft
296	Wall	Insulate Interior Buffered Wall With 4" Dense Pack Cellulose	Sq Ft
300	Wall	Insulate Multiple Sided Wall With 4" Dense Pack Cellulose	Sq Ft
305	Wall	Insulate Vinyl Sided Wall With 3" Dense Pack Cellulose	Sq Ft
306	Wall	Insulate Vinyl Sided Wall With 4" Dense Pack Cellulose	Sq Ft
311	Wall	Insulate Wall From Interior With 3" Dense Pack Cellulose	Sq Ft
312	Wall	Insulate Wall From Interior With 4" Dense Pack Cellulose	Sq Ft
314	Wall	Insulate Wall From Interior With 6" Dense Pack Cellulose	Sq Ft
315	Wall	Insulate Wood Shingle Sided Wall With 3" Dense Pack Cellulose	Sq Ft
316	Wall	Insulate Wood Shingle Sided Wall With 4" Dense Pack Cellulose	Sq Ft
322	Wall	Insulate Wood Sided Wall With 4" Dense Pack Cellulose	Sq Ft

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# IIC WORK ALLOCATION

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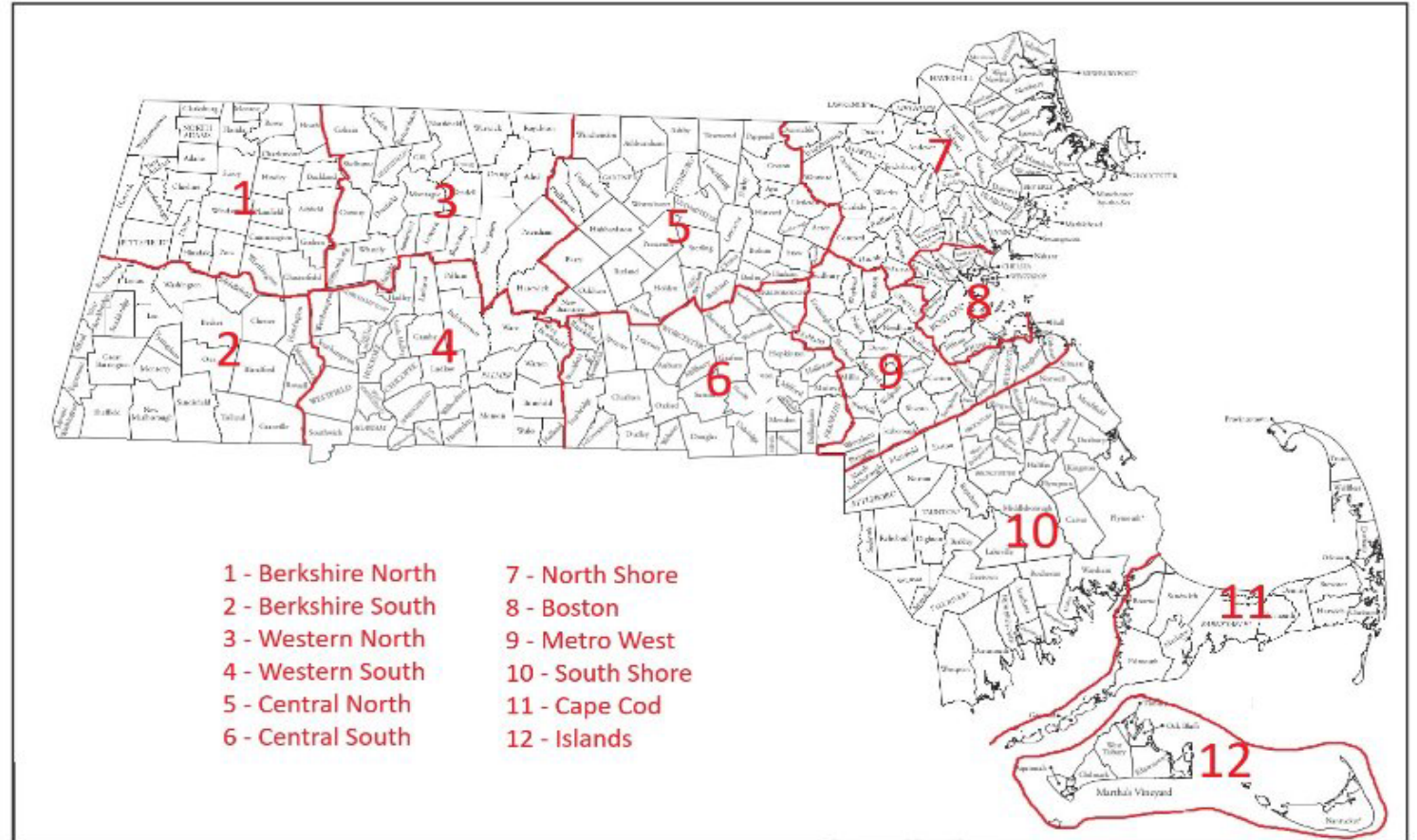
# IIC Work Allocation

- Our goal is to cultivate a stable and competitive market where Independent Installation Contractors (IICs) receive consistent work allocations that support business sustainability, workforce retention, and service excellence.
- In response to **CONTRACTOR FEEDBACK**, we are refining our IIC work allocation methodology through a **3-step** process:
  - Better aligns with ensuring fair opportunity, rewarding high work quality, cost effective pricing, and driving overall program success without creating financial instability for contractors.
  - Still maintaining competitive elements within the RFQ process.



# Step 1: Zone Changes

- The state will be broken up into 12 Zones where the Lead Vendors will identify anticipated work allocation for each zone.
- In the bid packet, contractors will identify which zones they work in, provide their overall allocation capacity, and provide an estimated allocation capacity for each zone they work in.



# Step 2: Quantity of Contractors to Receive Allocations

- On a zone-by-zone basis, the quantity of contractors awarded Work Allocations will be determined by the following metrics:
  - Lead Vendor-provided expected volume – per zone
    - Based on historical averages of allocated completed projects in each zone.
  - Contractor-provided expected capacity – per zone
    - Based on contractor defined capacity and historical contractor throughput.

# Step 3: Selection of Contractors

- The contractors, with the most competitive bid, per zone, will be selected for Work Allocation for the next 12 months until Lead Vendor-provided expected volume has been satisfied.
- Contractors may be selected for more than 1 zone.
- Contractors must maintain a minimum **Contractor Grade Score** of 9.0 or higher to continue receiving Work Allocations.
  - Work Quality – 60%
  - Customer Recruitment – 10%
  - Customer Service – 15%
  - Administrative – 15%
  - No longer scored:
    - RFQ Bid Score
    - Time to Serve
- New allocation and scoring metric will start September 1st, 2025.

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# HPC CUSTOMER ACQUISITION FEE

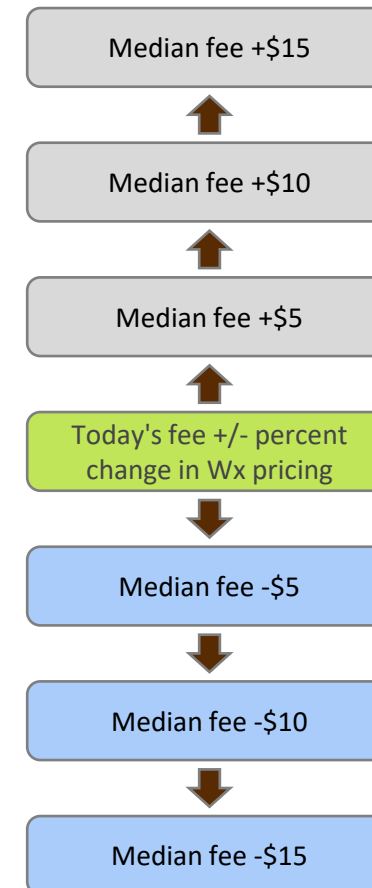
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# What is it?

- This fee is designed to place a value on customer acquisition costs.
- We heard your feedback from the listening sessions.
- Adjusted the methodology to reduce the spread across all HPCs.
- The updated fee will be reimbursed with all processed invoices for weatherization contracts >\$1,000.

# HPC Customer Acquisition Fee - Calculation

- An HPC's relative rank among all HPCs will determine their fee.
- Each incremental fee will increase/decrease by \$5.
- The current median fee will be adjust based on the increase/decrease of the Wx pricing
  - A 5% increase in Wx pricing will result in a 5% increase to the median fee
- This will be a more equitable distribution of fees



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## ADDITIONAL DETAILS

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# Schedule

- **Wednesday, April 2nd:** Posting of the Request for Quotes (RFQ)
- **Wednesday, April 2nd:** Written question submission opens
- **Wednesday, April 2nd:** Contractor RFQ Informational Call #1
- **Tuesday, April 8th:** Contractor RFQ Informational Call #2
- **Monday, April 14th:** Deadline for Contractors to submit written questions
- **Wednesday, April 23rd:** Responses to all written questions posted and closed
- **Wednesday, May 7th:** Proposal Submission Deadline
- **Friday, May 9th:** Notification of clarifications required as needed to specific contractors
- **Wednesday, May 14th:** Clarifications Due
- **Wednesday, May 28th:** Notification of results to Respondents
- **Monday, June 9th:** New Pricing Launch
- **Monday, September 1st:** New IIC Work Allocation and scoring system implemented



# Legal Notice

- **Prevention of Collusion, Fraud, or Intent to Deceive**
  - Bid-rigging or otherwise undermining a competitive process is a violation of the Massachusetts consumer protection act, (M.G.L. c. 93A.) and violators could be subject to legal action.
  - If it is found that any Respondent or group of Respondents is colluding to influence others, defraud, or artificially inflate quotation pricing, the Requestor can exercise their rights to reject those bids or all bids and require resubmittal, or set the price on their own.
  - Those who are found to have colluded may be barred from participation in the Mass Save Programs sponsored by the Requestors.
  - Respondents have a responsibility to report any knowledge of attempts to collude to influence others, defraud, or artificially inflate quotation pricing. Failure to do so may result in also being barred from participation in the Mass Save Programs sponsored by the Requestors.

# RFQ Website

- Questions should be sent in via the RFQ website or sent to the RFQ inbox:
  - <https://www.wxpricebidding.com/>
  - [MassSaveRFQ@therisegroupinc.com](mailto:MassSaveRFQ@therisegroupinc.com)

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**THANK YOU**

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