



# ZEOS Request for Proposals 2025

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# Overview

Through this Request for Proposals (“RFP”), the Rhode Island Housing and Mortgage Finance Corporation (“RIHousing”), the Rhode Island Office of Energy Resources (“OER”) and Rhode Island Energy, (“RI Energy”) (collectively, the “Program Partners”) seek proposals from qualified teams (“Project Teams” or “Project Team Members”) to design and construct affordable<sup>1</sup> energy efficient Zero Energy Building (“ZEB”) housing unit(s) to serve low-and moderate-income<sup>2</sup> (“LMI”) residents in Rhode Island.

Approximately \$1,274,000 of grant funding (subject to availability) has been allocated by the Program Partners for the development of these units. The housing units must employ solar PV and air-source heat pump (“ASHP”) technologies to achieve ZEB status. The units include new construction and/or renovation projects as detailed in the Project Requirements and outlined Scope of Work.

A ZEB is defined as an energy-efficient building, where, on a source energy basis, the actual annual delivered energy is less than or equal to the annual on-site renewable exported energy (based on the US Department of Energy’s ZEB definition<sup>3</sup>).

The Zero Energy for the Ocean State (“ZEOS”) program is the result of a collaborative approach by the Program Partners to expand ZEB housing to LMI sectors. The Program Partners seek demonstration projects that encompass four primary elements – design, explore, inform, and assess – meant to create a pathway for scaling ZEBs in LMI residential sectors as a means of reducing greenhouse gas emissions.

The program is in response to the recommendations included in the Rhode Island Zero Energy Task Force’s Zero Energy Building Pathway to 2035 white paper<sup>4</sup>. The white paper established a goal to create ZEB demonstration projects across building sectors. Grant funds are to be used for eligible hard costs that directly improve energy efficiency measures. ZEOS assisted projects must be completed within three years of commitment date or funds will be recaptured at the discretion of the Program Partners.

The ZEOS grant awards will be limited to \$18,200 per unit for 1-4 family developments and \$7,500 per unit for multifamily developments. The total award cannot exceed \$300,000 for any individual project. Buildings must qualify as ZEB (according to US Department of Energy’s ZEB definition) and participate in RI Energy’s Residential New Construction Program.

Projects must be located within Rhode Island and may include:

- 1-4 family new construction, or townhouses
- 1-4 family significant rehab, or townhouses
- Multi-family new construction
- Multi-family significant rehab

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<sup>1</sup> In general, housing for which the occupant(s) is/are paying no more than 30 percent of their income for gross housing costs, including utilities.

<sup>2</sup> Low- and Moderate-Income Family: families whose [combined] income does not exceed 60 to 120 percent of the median family income for the area.

<sup>3</sup> [https://energy.gov/sites/prod/files/2015/09/f26/bto\\_common\\_definition\\_zero\\_energy\\_buildings\\_093015.pdf](https://energy.gov/sites/prod/files/2015/09/f26/bto_common_definition_zero_energy_buildings_093015.pdf)

<sup>4</sup> [https://www.nationalgridus.com/media/pronet/ri-ee-task-force/cm6459-ri-zne-white-paper-12\\_16.pdf](https://www.nationalgridus.com/media/pronet/ri-ee-task-force/cm6459-ri-zne-white-paper-12_16.pdf)

Applicants will be expected to work closely with the Program Partners throughout the project design, construction, performance verification, inspections, interconnection and data collection processes.

## Objectives

### **The grant program will:**

1. Provide a grant to contribute to the realization of one or more ZEBs that are aesthetically attractive, affordable, replicable, and meet RIHousing Design Standards.
2. Stimulate innovative, replicable solutions to utilize cost saving clean energy and encourage demand response technologies in homes available to LMI customers through the efficient use of multi-agency funding.
3. Demonstrate the potential for solar PV systems in combination with ASHP, energy efficiency measures, and smart technologies to reduce the energy burden of LMI customers.
4. Deliver the highest, long-term utility bill benefits for the households living in the units.
5. Collect data to inform the design and administration of future programs benefiting LMI Rhode Island Residents.
6. Collect data to inform RIHousing, the OER and RI Energy on program design that will contribute to the mobilization of the ZEB market, and other goals as stated in the Zero Energy Task Force white paper.

### **The ZEOS project will:**

1. Establish a replicable ZEB model for LMI customers that can be brought to scale across the State.
2. Explore options for ZEB feasibility and impact in the residential sector.
3. Inform the Program Partners and stakeholders on new and available resources, benchmarking, project successes and details, and lessons learned.
4. Assess and evaluate aspects of the ZEOS project to identify areas for calibration and modification.
5. Identify options for customers to meet the zero-energy goal of their home.

# Applicant Eligibility

## Ineligible Applicants

1. Individual homeowners are not eligible to receive direct funding.
2. Previously funded ZEOS projects.
3. Projects located outside of Rhode Island.

## Eligible Applicants

Applicants may:

1. be a company, organization, or institution
2. be a Project Team consisting of a lead organization with additional organizations to complement the lead.
3. include, but are not limited to:
  - a. non-profit organizations
  - b. for profit organizations
  - c. community-based organizations
  - d. private consultants
  - e. contractors
  - f. Previously funded teams

Applicants must:

1. have sufficient technical capacity in the design and oversight of high energy performing building contracting.
2. include the following certificates and registrations listed in the chart below:

| Qualification Information   |  |
|---|--|
| Registered in Rhode Island  | All Applicants/Installers or Project Team members must be registered to do business in RI.<br><a href="http://www.sos.ri.gov/divisions/business-portal">http://www.sos.ri.gov/divisions/business-portal</a>  |
| State of Rhode Island Contractors' Registration and Licensing Board | Rhode Island law requires anyone who is in the business of commercial construction, home construction, alterations, remodeling, or repair to residential home be registered with the State of Rhode Island Contractors' Registration and Licensing Board. <a href="https://crb.ri.gov/">https://crb.ri.gov/</a><br>Please provide a scanned copy of the registration card.                             |
| Solar Master Electrician License                                    | The Solar Electrical Contractor's License already includes the work allowed by the Renewable Energy Professional (REP) <sup>5</sup> limited license.<br><br>Only contractors or individuals without an “A” Electrical License are required to obtain the REP limited license to perform ancillary non-electrical work on renewable energy systems. Please provide this information in the application. |

<sup>5</sup> <https://energy.ri.gov/renewable-energy/solar/renewable-energy-professional-rep>

|                          |  |
|--------------------------|--|
| HVAC Contractor Training | <p>To be eligible for this program, the HVAC contractor must have been HVAC Check trained in proper airflow and charge protocols through RI Energy’s Rhode Island Heating and Cooling program.</p> <p><b><u>THIS IS REQUIRED FOR PROJECTS WITH SMALL RESIDENTIAL STYLE HEAT PUMPS</u></b></p> <p><a href="https://www.rienergy.com/site/ways-to-save/save-money-with-rebates-and-incentives/electric-heating-and-cooling">https://www.rienergy.com/site/ways-to-save/save-money-with-rebates-and-incentives/electric-heating-and-cooling</a></p> <p><a href="http://www.rienergy.com/media/ri-energy/pdfs/energy-efficiency/rhode-island-electric-contractors.pdf">www.rienergy.com/media/ri-energy/pdfs/energy-efficiency/rhode-island-electric-contractors.pdf</a></p> <p>Clean Heat RI List of Contractors<br/> <a href="https://cleanheatri.com/resources/find-an-installer/">https://cleanheatri.com/resources/find-an-installer/</a></p> |
| Special Licenses         | <p>Contractors must possess all the applicable licenses and certifications required under RI law and regulations to install the technologies requested.</p>  |

All solar and HVAC subcontractors hired and used for any activities related to the project must be disclosed in writing to the Program Partners if they are not identified in the response to this RFP. All solar and HVAC subcontractor licenses, registrations and insurance requirements must be provided to the Program Partners at the time of hire. The Program Partners must approve the use of any solar and HVAC subcontractors in writing prior to the Project Team using funds to pay for expenses associated with subcontractor costs. The Program Partners reserve the right to verify the licenses, registrations, and insurance requirements of all solar and HVAC subcontractors to ensure compliance with Rhode Island State Law and the requirements of this Program.

## Project Costs

The costs outlined below are demonstrative and do not represent an exhaustive list. If you are uncertain about a cost’s eligibility, please refer to the [Questions & Answers](#) Section of this RFP on how to submit your question.

## Ineligible Costs

The following costs are fully Ineligible:

1. Indirect/ Administrative Costs including those related to the preparation of the response to this RFP and management of any awarded funding, if received.
2. Soft Costs including feasibility studies, systems design/ engineering, and energy modeling.
3. Permitting, commissioning, and testing.
4. Gap financing for total development costs.
5. Costs for certification of projects such as HERS, LEED, EnergyStar rated.
6. Tree trimming or other vegetation management.
7. Batteries or controllers associated with energy storage systems<sup>6</sup> (See eligible battery costs in next section).
8. Re-roofing costs.

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<sup>6</sup> If storage is proposed with the solar PV system, applicants must explain why this provides value to a low-or moderate-income tenant or resident.

## Eligible Costs

1. Purchase and installation of energy production systems such as: photovoltaic arrays.
  - a. Building integrated installations, such as solar shingles, are eligible assuming all other requirements are met.
2. Purchase and installation of equipment that directly increases energy efficiency such as mini-splits, VRFs, and ERVs.
3. Purchase of energy monitoring systems and technology such as smart thermostats.
4. Batteries installed **at the same time** as a PV installation (MUST be in same interconnection application to the utility as the solar).
5. Hiring of energy consultant to complete the annual ZEOS benchmark reporting (using RIHousing's portion of ZEOS funds and not OER's portion of ZEOS (RGGI) funds).

## Submission Guidelines

All proposals must be:

1. Received by the submission deadline.
2. Submitted using the OneStop application portal. Contact Nivea Linhares at [nlinhares@rihousing.com](mailto:nlinhares@rihousing.com) for your organization specific access code and instructions.
3. Completed in full. Failure to provide any information, certification, or document requested in this RFP may cause your submission to not be scored.

Applicants are advised that all submissions (including those not selected for engagement) may be made available to the public on request upon completion of the process and award of a contract(s).

By this RFP, the Program Partners have not committed themselves to undertake the work set forth herein. The Program Partners reserve the right to reject any and all proposals, to rebid the original or amended scope of work and to enter into negotiations with one or more respondents. The Program Partners reserve the right to make those decisions after their receipt of responses. The Program Partners' decision on these matters is final.

## Timeline

RFP Issued: February 10, 2025

Proposal Submission Deadline: April 7, 2025, at 5pm Close of Business

## Questions & Answers

Questions about this RFP can be submitted via email to [ZEOSprogram@rihousing.com](mailto:ZEOSprogram@rihousing.com) and Q&A will be publicly posted on the ZEOS RFP page on <https://www.rihousing.com/rfps-rfqqs/> and updated weekly.

# Scope of Work

The demonstration project must complete each Task as outlined in this RFP. Projects that also utilize demand response technologies such as battery storage, smart thermostats, or other smart appliances and participate in RI Energy’s demand response programs to optimize energy time of use, are strongly encouraged.

## Task 1: Project Design

1. Design the project to meet or exceed the Minimum Technical Requirements as shown in the chart below:

| Minimum Technical Requirements                |   |
|---|---|
| Item  | Notes   |
| Department of Energy, Zero Energy Ready Homes | In addition, the final project (including the PV solar installation) must meet DOE’s definition of a ZEB. An independent third-party must verify that the project meets the DOE ZEB.  |
| RI Energy, Energy Certification               | Must meet the requirements of RI Energy’s Residential New Construction Program and achieve a minimum of RNC Tier 2 (26% savings). RNC Tier 3 (40% savings) is encouraged.   |
| Solar PV and Air-Source Heat Pump (“ASHP”)    | Must demonstrate compliance with any Minimum Technical Requirements set forth in any incentive program for solar PV or ASHPs utilized in the proposed project.<br><br>Program Partners reserve the right to inspect any system installed under this program and withhold funding for any project that does not satisfy any relevant incentive program Minimum Technical Requirements. |
| Solar and Related Equipment                   | All installations must use solar photovoltaic (PV) technology. Proposed PV equipment must be UL listed. Equipment listed on the California Energy Commission’s list of approved equipment <sup>7</sup> is recommended.  |
| Solar PV                                      | All installations must use solar photovoltaic (PV) technology. Proposed PV equipment must be UL listed. Equipment listed on the California Energy Commission’s list of approved equipment <sup>8</sup> is recommended.  |
| ASHP  | Refer to the Northeast Energy Partnership’s listing of all models of ASHP systems <sup>9</sup> . Contractor must be HVAC Check trained in proper airflow and charge protocols through RI Energy’s Rhode Island Heating and Cooling program.   |

2. Identify homeowners or tenants and their eligibility under HUD’s 120% AMI guidelines.
3. Provide a detailed project approach which outlines all grant-related activities and associated milestones and deliverables.

<sup>7</sup> <https://www.energy.ca.gov/programs-and-topics/programs/solar-equipment-lists>

<sup>8</sup> <https://www.energy.ca.gov/programs-and-topics/programs/solar-equipment-lists>

<sup>9</sup> <https://ashp.necp.org/#/>



4. Photovoltaic (PV) System - Include a Solar Photovoltaic array proposal from a qualified and licensed professional. The proposal should include a solar study indicating system size, percentage of anticipated development electrical consumption based on an engineer’s analysis, return-on-investment analysis depicting up-front cost and life cycle savings, and meter narrative.
5. Final project proforma (sources and uses tabs at a minimum) with construction cost estimates.
6. Participate in periodic meetings and conference calls to review project status and identify appropriate project adjustments, as needed.

## Task 2: Project Execution

1. Systems shall be installed in a turn-key manner, with the Project Team leader overseeing all installation activities. All equipment shall be installed in a manner consistent with the minimum technical requirements found in this document. It is expected that a higher level of installation monitoring be conducted as installation of systems is critical to achieving maximum energy efficiency.
2. Include a data acquisition system (“DAS”) to be installed with the PV system. Specifications sheet(s) for the proposed DAS must be provided to and approved by the Project Partners. A list of DAS providers can be found in the [Additional Resources](#) section of this document. If wireless Internet will be a barrier to the DAS requirement at the proposed project location, solutions must be proposed and approved before DAS installation. The contract with the solar developer must explicitly identify the party responsible for the continuous functioning of the DAS system. The solar contractor must be made aware of this requirement.
3. Include additional on-site construction supervision by CLEAResult or other similarly qualified entity for the installation of energy efficient measures in the program design and construction costs.
4. Provide ongoing system maintenance services. Awardees will provide a minimum of a one-year construction warranty including operating, maintenance and monitoring services for installed systems according to the table below:

| Warranty Requirements |  |
|-----------------------|--|
| Item                  | Minimum Warranty Length Required by the ZEOS Program   |
| Air Source Heat Pumps | 7 years  |
| Battery storage       | 3 years  |
| EV Charging           | 5 years  |
| Commercial VRFs       | 5 years (10 years preferred with diamond installer)  |
| Solar PV              | 20 Years on Equipment, 3 years workmanship, 1 year Labor & Material, 1 year minimum on monitoring and/or reporting equipment services and maintenance.   |
| PV inverter(s)        | An extended warranty that must meet or exceed the expected life of the PV installation. If an extended warranty is not available or if the equipment is not warrantied for the entire expected life of the system (minimum 20 years), please detail the plan to replace the inverter(s) making sure to include the replacement cost in the proposed fee structure. |

- Obtain consent from the occupant(s) of the housing to maintain the data system and continue sharing data with the Project Partners for at least 5 years after construction, which is necessary to meet reporting requirements.

### Task 3: Certifications & Data Collection

- Obtain certifications that the building(s) meet the [DOE Zero Energy Home](#) standards and at minimum RNC Tier 2 (26% savings) as a building for multifamily, and single family as a unit. RNC Tier 3 (40% savings) and PHUIS certification is encouraged. Conduct testing that verifies the building is performing as designed and to the expected energy use goals.
- Project Team will work with RI Energy and Project Partners to conduct testing that verifies the building is performing as designed to meet expected energy use goals. Project Team will make adjustments to building systems to address any inefficiency as needed in order to maximize building performance.
- Conduct systems testing and performance monitoring measured, verified, and certified at various construction benchmarks and written reports supplied to Program Partners. This would be conducted by CLEAResult or similarly qualified entity.
- Collect and report project performance data and report Key Performance Indicators. Awardees will annually report on Key Performance Indicators including those listed in the chart below, for a period of five years following substantial completion.

### Task 4: Reporting

- Participate in ongoing installation monitoring and job progress reporting and/or meetings and payment requisition meetings.
- Awardees will be required to provide annual reporting on project performance for a period of 5 years following project completion.
  - The first report (the ‘year 1 report’) will be for the ‘current period’, which begins when a certificate of occupancy is granted and culminates on 12/31 of that year. This year 1 report should also include lifetime estimates that reflect impacts over the expected life of the project, beginning when a certificate of occupancy is granted and culminating at the end of the useful life of the equipment, building, or other appropriate benchmark.
  - The next four reports – year 2 report through year 5 report – should all provide annual data. Reporting will include, at minimum, the following performance indicators:

| Key Performance Indicators                                  |       |
|---|-------|
| Indicator   | Units |
| MWh avoided, current period and lifetime                    | MWh   |
| Oil Avoided (MMBtu), current period and lifetime            | MMBtu |
| Energy Bill Savings, current period and lifetime            | \$    |
| Demand Response Revenue Earned, current period and lifetime | \$    |

|   |               |
|---|---------------|
| CO2 emissions avoided (metric Tons of CO2), current period and lifetime | Tons (metric) |
| Expected Energy Savings for Building Residents                          | \$            |
| Expected Annual Demand Response Revenue (if included)                   | \$            |
| Funds Leveraged   | \$            |
| Construction Costs (above code)   | \$            |
| Operation & Maintenance Cost Estimates                                  | \$            |
| Solar PV System Size Installed  | kW            |
| Summer Peak Demand Reduction Expected (if included)                     | kW            |
| Number of Units Constructed/Renovated                                   | #             |
| Number of Customers Served  | #             |

## Task 5: Knowledge Sharing

1. Make available all design and specifications to be published publicly for the development of additional ZEB LMI housing units.
2. Make available a public construction best practice document for the development of ZEB projects.
3. Provide an Operations & Maintenance Training Manual for residents and make it publicly available to advance the operations knowledge of ZEB building owners.
4. Provide site access for tours and educational activities in coordination with the Project Partners.

## Evaluation & Selection

The Program Partners will review all proposals and make a determination based on the factors as outlined below. Top applicants may be asked to present their projects to the Program Partners.

All projects will be scored on their Project Team Experience, Project Approach & Goals, and Budget & Use of Funds totaling a maximum of 105pts. While not a requirement of the Program, applicants are highly encouraged to achieve up to 15 bonus points for the inclusion of Innovative Technologies in their Projects.

This is a competitive application process. The highest scoring projects will be prioritized to receive funding at their full requested amount. Lower scoring projects will be considered for funding as long as funding remains. The Program Partners reserve the right to not fund any projects that do not meet the minimum requirements of the Program.

| Point Allocation Summary   |                 |
|--|-----------------|
| Category   | Possible Points |
| <b>Project Team Experience (up to 20pts)</b>   |                 |
| Evidence of Project Team's technical capacity in High Performance Energy Contracting.  | 5               |
| Proof of Track Record of Success with: (Energy Efficiency, ASHP, Integrated Controls, Solar PV)  | 4               |
| Proven Record of creating LMI Housing  | 3               |
| Demonstrates Capacity within Organization to manage proposed project   | 2               |
| MBE/WBE Minority Status (Development Team Only)  | 2               |
| Proven Commitment to Affirmative Action  | 2               |
| Advanced Certifications and licenses (LEED, PHIUS, etc.) (Development Team Only)   | 2               |
| <b>Project Approach and Goals (up to 45pts)</b>  |                 |
| Replicable/ Scalable   | 5               |
| Affordable 60-120% AMI (60% or below full 5 pts)   | 5               |
| Development of Plans & Specifications: Schematic 2 pts; 50% 4 pts; 90% 6 pts; 100% 8 pts   | 8               |
| Clear Timeline/ Readiness to Proceed: Permit in hand eligible for full 10 pts; Master Plan 2 pts; Preliminary Plan 2 pts; Final Plan or Zoning by Right 4 pts  | 10              |
| Meets RNC Tier 3 (40% savings) or min. RNC Tier 2 AND Pre certified for Passive House (PHIUS). Demonstration of certifiability for Energy Star 1.1 Multifamily or Energy Star 3.1                              | 5               |
| Demonstrate pass-through savings to occupants<br><a href="https://www.hud.gov/press/press_releases_media_advisories/hud_no_23_162">https://www.hud.gov/press/press_releases_media_advisories/hud_no_23_162</a> | 3               |
| Walkability Metric from walkscore.com: 40-60 1pt; 60+ 2 pts  | 2               |
| HERS Energy Modeling of Design   | 2               |
| Solar sized for common areas only 1 pt; Solar sized for common areas and site 3 pts; Common areas, site, and entire building 5 pts   | 5               |
| <b>Budget &amp; Use of Funds (up to 40pts)</b>   |                 |
| Readiness to Proceed; Provide proof of commitment letters from all funding sources   | 10              |
| Leveraging of Funds to minimize ZEOS request. Ratio of Total Request/# of Units Effected   | 5               |
| Fees in line with RIH guidelines, developer fees, overhead and profit, general conditions  | 5               |
| Integration of existing energy efficiency & renewable energy programs & incentives (solar REG incentives are not eligible)   | 5               |
| Cost Benefit Analysis of energy efficiency and solar capacity (Solar array study with ROI and cost benefit analysis)   | 5               |
| Cost Effective, Durable and Long-Lasting Design  | 4               |
| Total Development Cost/Unit (at or below RIH Guidelines)   | 3               |
| Efficient ongoing maintenance cost   | 3               |
| <b>Total Possible Points</b>   | <b>105</b>      |

| Innovative Technologies (15 bonus pts)   |   |
|--|---|
| Energy Storage   | 3 |
| EV Charging Infrastructure (3 Full Points for EV Charger, 1 point for EV Ready)  | 3 |
| Energy Management Systems or Smart Controls (Wi-Fi enabled thermostats)  | 1 |
| Demand Response Program Participation and Expected Revenues (see the Additional Resources section for more information)      | 4 |
| Use of Rhode Island Stretch Code   | 2 |
| Other Energy Sources besides Solar and Resource Saving Equipment   | 1 |
| Green Site Design (bioswales, green infrastructure, building orientation, preserving of open space, clustering of buildings) | 1 |

## ZEOS Agreement

### Anticipated Term

It is expected that agreements will commence in Q3 2025. Final agreements are subject to successful negotiation of a final budget and scope of work. The agreement will be reviewed during its course and may be extended at the sole discretion of the Program Partners.

### Disbursement Schedule

Funding will be provided in increments of work completed for allowable costs per the executed agreement. Release of funding for completed solar installations will be withheld until an interconnection agreement and third-party inspection by an REF provider is obtained. A “hold-back” of 10% of the amount awarded to the project will be released pending all close-out items have been submitted to and accepted by the Program Partners, and the first year of reporting (of the 5 years required) has been submitted and accepted by the Program Partners.

# Application Submission Package

## Requirements

All items below must be included in your application submission following any specific instructions described in this list. As a reminder, failure to provide any information, certification, or document requested in this RFP may cause your application not to be scored.

### A. Executive Summary

If there is more than one organization on the Project Team, identify the lead organization (the “Lead Member”) and all Project Team Members.

#### 1. Project Narrative

Provide a detailed narrative of the development that reflects the goals of the ZEOS program. Include in the narrative your solutions for conducting the tasks detailed in the [Scope of Work](#) while delivering significant energy and cost savings for each dollar of public investment. The narrative shall be no longer than eight pages (not including construction plans & specifications). At a minimum, the narrative should include:

1. A description of how the proposed project approach will address existing ZEB market barriers for low-income residents and other sectors.
2. Additionally, provide a description of demand response technologies if they are proposed. Include a description to the extent that the proposed project has the potential to mobilize the ZEB market by demonstrating the benefits of ZEB, establishing scalability, and making a case for ZEB as a financially worthwhile choice.
3. A detailed timeline including dates for key milestones and deliverables associated with the [Scope of Work](#).
4. A methodology for evaluating and selecting participants that meet the 60%-120% AMI guidelines for the region as defined by HUD<sup>10</sup>.
5. Detail of expected project performance metrics. (Refer to Key Performance Indicators table) Applicants must provide a description of any qualitative benefits that will result from their proposed approach (i.e. better indoor air quality, greenhouse gas reductions, etc.).
6. Building Energy Modeling performed by CLEAResult or others, confirming projected energy savings percentage or RNC Tier level is encouraged.
7. A description of how demand response technologies will or will not be installed in the project and if they will be installed, how occupants or building owners will receive demand response program participation revenues.
8. A description of all education activities and materials as well as site tours that will be created/conducted during the project to satisfy [Task 5: Knowledge Sharing](#). Please pay particular attention to when and how residents will be trained in the Operations & Maintenance of the energy efficient technologies and energy conserving behaviors.

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<sup>10</sup> <https://www.rihousing.com/wp-content/uploads/FY-24-HUD-Income-Limits.pdf>

## **2. General Organization Information**

1. Name, telephone number and email address of the Lead Member organization authorized to discuss your proposal,
2. Name of the principal(s) of each Project Team Member,
3. Address of all offices of the Project Team Members.
4. An organizational chart that demonstrates reporting structures and roles and responsibilities for program administration, including key staff and any subcontracted firms.
  - a. Highlight all relevant certifications and registrations held by any Project Team Member.
  - b. Provide a written description, summarizing the overall project and methodology for achieving all required deliverables, tasks, and objectives outlined in the Scope of Work.

## **3. Experience and Resources**

1. Describe each Project Team organization and its capabilities and number of employees. In particular, provide a description of the Team's capacity to perform the proposed Scope of Work. Provide a description of the organizational history and current status including services, projects, staff capacity, and evidence of a proven track record of success with energy efficiency, ASHP, integrated controls, PV installations, and working with LMI programs and populations.
2. Provide a roster of principals and associates from the lead team member firm who would be involved in providing services to the proposed project. Provide appropriate background information for each such person and identify his or her responsibilities. Clearly demonstrate that the organization has the staff capacity and thorough understanding of the scope to quickly launch and deploy the project as proposed.
3. Include a current client roster, including a lead contact name and telephone number for each. [OR] Provide a detailed list of references, including a contact name and telephone number for organizations or businesses for whom you have performed similar work.
4. Provide case studies including photos of past work completed related to this Scope of Work.
5. Identify any conflict of interest that may arise as a result of business activities or ventures by your firm and associates of your firm, employees, or subcontractors as a result of any individual's status as a member of the board of directors of any organization likely to interact with RIHousing, the OER or RI Energy. If none, please provide a statement to such effect.
6. Describe how your Lead Member organization and all Project Team Member organizations will handle actual and or potential conflicts of interest.
7. Identify any material litigation, administrative proceedings or investigations in which your firm and all Project Team Member organizations are currently involved. Identify any material litigation, administrative proceedings or investigations, to which your firm or any of its principals, partners, associates, subcontractors or support staff was a party that has been settled within the past two (2) years. If none, please provide a statement to such effect.
8. Identify individuals in Lead Team with multi-lingual skills, who are available to assist with written and/or verbal communication in languages other than English. Please identify the language(s).

## **B. Construction Plans, Specifications, & Building Information**

At a minimum to include:

1. Construction Plans to include:
  - a. Site Plan w/ location map showing:
    - i. Zoning requirements & North arrow
    - ii. Setbacks
    - iii. Easements
    - iv. Streets
    - v. Parking
    - vi. Landscaping
  - b. Floor Plans
  - c. Elevations – Showing window types & finish materials.
  - d. Sections – Showing insulation & construction type
2. Outline Specification by Division
3. Solar Array Study with ROI, cost benefit analysis, and solar capacity to meet energy load
4. Fact Sheet Listing:
  - a. Proposed Building Type
    - i. Lot Size
    - ii. Gross & Net Building Area
    - iii. Unit count, type, size, & distribution
    - iv. % of lot covered by buildings, parking & other paved areas

## **C. Readiness to Proceed**

Include the Construction Requirements Checklist PDF attachment (download from ZEOS RFP website) and proof with documentation.

## **D. Development Budget**

Cost of services and the ability to leverage other funds are factors that will be considered in awarding this contract. Information requested in this section is required to support the reasonableness of the proposed budget. Costs incurred prior to the execution of an agreement with ZEOS will not be reimbursed.

1. Provide a cost proposal for completing the proposed development. Use Development Proforma (sources and uses tabs at a minimum) and Contractor's Cost Breakdown excel templates for reporting the project cost breakdown. At a minimum, the cost proposal should address:
  - a. Design and construction
  - b. All overhead and profit costs clearly identified
  - c. Additional technical expertise during the design phase
  - d. Additional onsite expertise during construction
  - e. Technology and equipment requirements such as solar panels, ASHPs, insulation, windows, and air sealing



- f. Cost benefit analysis of level of energy efficiency and solar capacity to meet energy load
  - g. Creation of replicable plans and specifications
  - h. Creation of Operations & Maintenance manuals for all the major equipment used in the project
  - i. Leveraged sources and dollars
  - j. Ongoing maintenance costs including inverter replacements or extended warranties
2. Provide an itemized breakdown of billing rates and hourly costs, list of key personnel and their hourly rates, reimbursable expenses, etc. for any services that may be requested in addition to the services previously described.
3. Provide any other fee information applicable to the engagement that has not been previously covered that you wish to bring to the attention of RIHousing, the OER and RI Energy.

### **Note on Available Solar PV Incentives**

RI Energy's Renewable Energy Growth program is **not** available to be used with projects in the ZEOS program. OER is utilizing Regional Greenhouse Gas Initiative (RGGI) funding for a portion of the grant award. RGGI funding cannot be combined with the REG program for any project or program.

The Renewable Energy Fund (REF) **can** be used for projects in the ZEOS program. If utilizing the REF, it is strongly encouraged to review the REF Minimum Technical Requirements.

## **E. Self-Scoring**

1. Use the self-scoring sheet and include with your project submission.

## **F. Minority Participation**

1. RIHousing and its Program Partners encourage the participation of persons of color, women, persons with disabilities and members of other federally and State-protected classes. Describe your Project Team's affirmative action program and activities. Include the number and percentage of members of federally and State-protected classes who are either principals, senior managers, contractor or sub-contractors on your Project Team, and the number and percentage of members of federally and State-protected classes on your Project Team who will work on RIHousing's engagement and, if applicable, a copy of your Minority- or Women-Owned Business Enterprise state certification.

## **G. Certifications**

1. RIHousing and its Program Partners insist upon full compliance with Chapter 27 of Title 17 of the Rhode Island General Laws, Reporting of Political Contributions by State Vendors. This law requires State Vendors entering into contracts to provide services to an agency such as RIHousing, for the aggregate sum of \$5,000 or more, to file an affidavit with the State Board of Elections concerning reportable political contributions. The affidavit must state

whether the State Vendor (and any related parties as defined in the law) has, within 24 months preceding the date of the contract, contributed an aggregate amount in excess of \$250 within a calendar year to any general officer, any candidate for general office, or any political party. Please acknowledge your understanding of this in your RFP response.

2. Does any Rhode Island “Major State Decision-maker,” as defined below, or the spouse or dependent child of such person, hold (a) a ten percent or greater equity interest, or (b) a Five Thousand Dollar or greater cash interest in this business?

For purposes of this question, “Major State Decision-maker” means:

- a. All general officers; and all executive or administrative head or heads of any state executive agency enumerated in § 42-6-1 as well as the executive or administrative head or heads of state quasi-public corporations, whether appointed or serving as an employee. The phrase “executive or administrative head or heads” shall include anyone serving in the positions of director, executive director, deputy director, assistant director, executive counsel or chief of staff;
- b. All members of the general assembly and the executive or administrative head or heads of a state legislative agency, whether appointed or serving as an employee. The phrase “executive or administrative head or heads” shall include anyone serving in the positions of director, executive director, deputy director, assistant director, executive counsel or chief of staff;
- c. All members of the state judiciary and all state magistrates and the executive or administrative head or heads of a state judicial agency, whether appointed or serving as an employee. The phrase “executive or administrative head or heads” shall include anyone serving in the positions of director, executive director, deputy director, assistant director, executive counsel, chief of staff or state court administrator.

If your answer is “Yes,” please identify the Major State Decision-maker, specify the nature of their ownership interest, and provide a copy of the annual financial disclosure required to be filed with the Rhode Island Ethics Commission pursuant to R.I.G.L. §§36-14-16, 17 and 18. If your answer is “No,” please provide a statement to such effect.

3. In the course of providing goods or services to RIHousing, the selected respondent may receive certain personal information specific to RIHousing customer(s) including, without limitation, customer names and addresses, telephone numbers, email addresses, dates of birth, loan numbers, account numbers, social security numbers, driver’s license or identification card numbers, employment and income information, photographic likenesses, tax returns, or other personal or financial information (hereinafter collectively referred to as the “Personal Information”). The maintenance of the Personal Information in strict confidence and the confinement of its use to RIHousing are of vital importance to RIHousing.

Please include a letter from your president, chairman or CEO certifying that, in the event your firm is selected:

- a. any Personal Information disclosed to your firm by RIHousing or which your firm acquires as a result of its services hereunder will be regarded by your firm as

- confidential, and shall not be copied or disclosed to any third party, unless RIHousing has given its prior written consent thereto; and
- b. your firm agrees to take all reasonable measures to (a) ensure the security and confidentiality of the Personal Information, (b) protect against any anticipated threats or hazards to the security or integrity of the Personal Information, and (c) maintain reasonable security procedures and practices appropriate to your firm's size, the nature of the Personal Information, and the purpose for which the Personal Information was collected in order to protect the Personal Information from unauthorized access, use, modification, destruction or disclosure; and
  - c. when discarding the Personal Information, destroying it in a commercially reasonable manner such that no third party can view or recreate the information, electronically or otherwise.

These provisions, which implement the requirements of the Rhode Island Identity Theft Protection Act, R.I.G.L. § 11-49.3 et seq., will also be incorporated into the final contract with the selected respondent(s). In addition, if selected, your firm may be requested to provide a copy of its information security plan.

4. Please include a letter from your president, chairman or CEO certifying that:
  - a. no member of your firm has made inquiries or contacts with respect to this Request for Proposals other than in an email or written communication to [ZEOSProgram@RIHousing.com](mailto:ZEOSProgram@RIHousing.com) seeking clarification on the Scope of Work set forth in this proposal, from the date of this RFP through the date of your proposal.
  - b. no member of your firm will make any such inquiry or contact until after June 06, 2025.
  - c. all information in your proposal is true and correct to the best of their knowledge.
  - d. no member of your firm gave anything of monetary value or promise of future employment to a RIHousing employee or Commissioner, or a relative of the same, based on any understanding that such person's action or judgment will be influenced.
  - e. your firm is in full compliance with Chapter 27 of Title 17 of the Rhode Island General Laws, Reporting of Political Contributions by State Vendors.

# Additional Resources

## Rhode Island Housing Guidelines

- [2025-Section-3-Underwriting-Guidelines-and-Development-Standards.pdf](#)

## Rhode Island Zero Energy Building Task Force

- [https://www.nationalgridus.com/media/pronet/ri-ee-task-force/cm6459-ri-zne-white-paper-12\\_16.pdf](https://www.nationalgridus.com/media/pronet/ri-ee-task-force/cm6459-ri-zne-white-paper-12_16.pdf)

## Rhode Island Stretch Codes

- <http://www.energy.ri.gov/policies-programs/lead-by-example/rhode-island-stretch-codes.php>

## RI Energy New Construction Incentive Program

- [ri-energy-rn\\_zero-energy-ready-program-description.pdf](#)

## RI Energy Demand Response Programs

- <https://www.rienergy.com/RI-Home/ConnectedSolutions/>

## Renewable Energy Fund (REF)

- <http://commerceri.com/finance-business/renewable-energy-fund/commercial-scale-projects/>

### REF Minimum Technical Requirements

- <https://commerceri.com/wp-content/uploads/2024/11/REF-MTR-2024-11.pdf>

## List of Data Acquisition Systems and related services

- <https://www.energy.ca.gov/media/3770>

## Voluntary “Cold Climate Air Source Heat Pump Specification” - NEEP

- [https://ashp.neep.org/#!/product\\_list/rhode\\_island](https://ashp.neep.org/#!/product_list/rhode_island)

## List of NEEP Referenced Resources on Heat Pumps

- [https://ashp.neep.org/#!/product\\_list/rhode\\_island](https://ashp.neep.org/#!/product_list/rhode_island)

## DOE Definition of a Zero Energy Buildings

- <https://energy.gov/eere/buildings/downloads/common-definition-zero-energy-buildings>

## DOE Zero Energy Ready Home Program

- <https://www.energy.gov/eere/buildings/doe-zero-energy-ready-home-zerh-program-requirements>