

# Request for Proposal (RFP)

**Equipment Replacement Scheme - Hot Water Heat Pump Installers Panel** 

RFP Released: 06 04 2023

Deadline for Questions: 19 04 2023

Deadline for Proposals: 5:00pm 04 05 2023

Energy Efficiency and Conservation Authority

www.eeca.govt.nz

Level 8/44 The Terrace

Wellington 6011

# **Contents**

The Opportunity	3
Section 1: Key Information	8
Section 2: Our Requirements	11
Section 3: Evaluation Approach	18
Section 4: Pricing	22
Section 5: Proposed Panel Agreement	24

#### **Appendices**

Appendix 1: Pre-conditions Response Form

Appendix 2: Relevant Experience and Track Record

Appendix 3: Process Map to Customer

Appendix 4: Co-funding Model

Appendix 5: Minimum Equipment Requirements

Appendix 6: Draft Panel Agreement

# The opportunity

This RFP is issued by Energy Efficiency and Conservation Authority referred to below as "the Buyer" or "we" or "us" or "EECA"

#### **Overview**

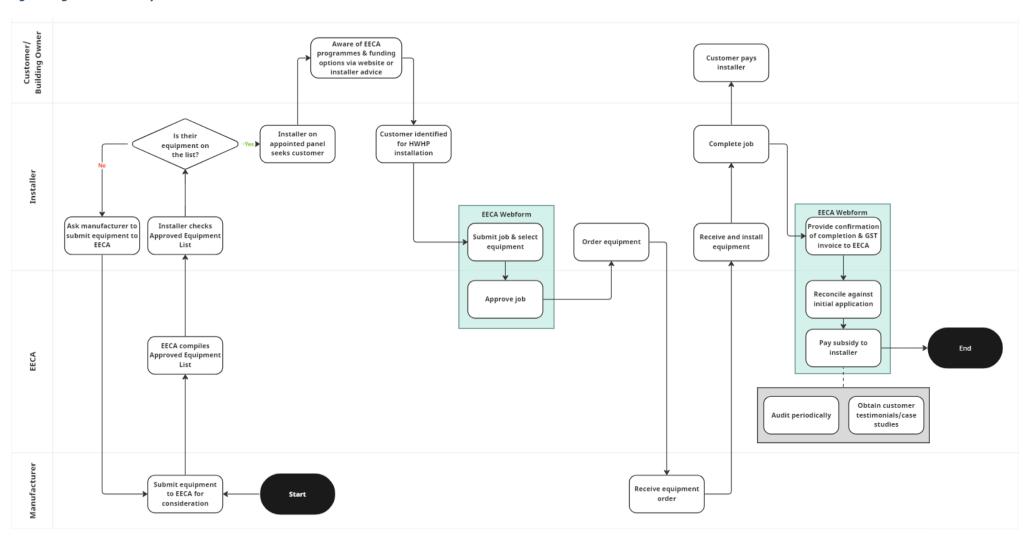
EECA is responsible for delivering the Government Investment in Decarbonising Industry Fund (GIDI), including an energy efficient equipment grant scheme which will, in part be operationalised through the Equipment Replacement Scheme (ERS).

Under the ERS, EECA has developed a programme which seeks to accelerate the adoption of hot water heat pumps for New Zealand's small and medium carbon emitters in the commercial and industrial sectors; the aim being reducing fossil fuel use and reducing carbon emissions. The programme will be focused on smaller package heat pump units (15-50kw), replacing existing califont instant/on demand hot water type boilers and/or providing new heat pumps to operate with existing combustions boilers (hybrid systems) for commercial buildings.

The definition of a commercial or industrial building is any building that is not residential or owned by central government but will include buildings leased to central government entities. This will be subject to review based on the performance of the programme.

To implement this programme EECA is seeking to establish a panel of hot water heat pump Installers with the capability and capacity to deliver the requirements of this programme. The panel agreement will be in place until 30 June 2024, with contract and project performance then assessed, and with potential for a further four-year extension depending on the outcome of that review.

Fig 1. Programme Delivery Model



#### Programme Delivery Model

- Hot water heat pump manufacturers review the Minimum Equipment Requirements (see Appendix 5) for the Hot Water Heat Pump programme and submit eligible equipment to EECA for consideration.
- EECA appoints the Installer Panel
- Installers on the panel approach customers (commercial businesses) throughout New Zealand and inform them of the programme and co-funding opportunity.
- Customer agrees to installer undertaking a site evaluation to determine whether their project qualifies for co-funding.
- Installer conducts site evaluation(s) to scope, size and price the installation to determine the correct solution for the customer, and to collect information for EECA's webform.
- Installer enters evaluation information into EECA's webform to determine whether the project qualifies for co-funding and to establish co-funding amount.
- For qualifying installations EECA will co-fund between 30-50% of total project costs (these are defined as the costs invoiced to the end user), up to a maximum project cost of \$150,000 excluding GST. Refer Appendix 4 for more information.
- EECA's webform notifies installer of project co-funding approval and co-funding amount. EECA will advise if monitoring equipment is a requirement for the project (this is to help verify the benefits of the new installations)
- Installer presents co-funding offer to customer. For projects that require monitoring equipment, installer will seek agreement from customer to install monitoring equipment and allow EECA to access data.
- Upon customer acceptance of installers' offer, a contractual relationship is entered into by installer and customer. (Note: EECA is not a party to the contract and so accepts no liability for non-performance or any other content of the contract).
- Installer will install hot water heat pumps that meet the minimum equipment requirements and undertake/oversee the decommissioning of the existing heating system and arrange for safe, sustainable and appropriate disposal.
- At completion of installation, customer pays installer.
- Installer notifies EECA of project completion by providing evidence of replacement and a GST invoice for the co-funding amount. If monitoring was a requirement of the project, the monitoring equipment reimbursement is claimed.
- EECA will pay all EECA co-funding to installer upon satisfactory reconciliation of project webform, invoice, and monitoring equipment reimbursement (if monitoring equipment was required).

• EECA will audit, at EECA's own cost, a sample of projects (across all panel installers) to confirm the equipment installation was delivered in accordance with programme eligibility criteria, webform details and co-funding agreement.

#### **Monitoring**

EECA will monitor a proportion of sites as part of the programme, the number and location of sites to be monitored will be determined by EECA and will commence on installation and run until a date yet to be determined, but potentially June 2025. EECA will monitor energy consumption, supplied hot water volume and temperature over this period to measure the performance of equipment and actual usage on site. This is to better determine the benefits of the programme.

We require Installers to seek written consent from customers to enable sharing of energy consumption and supplied hot water volume and temperature information with EECA.

Equipment in the programme will either have built-in capacity monitors or the ability to have monitoring equipment added, for each project where monitoring equipment is required:

- The installer will include the monitoring equipment as part of the installation. The type of monitor installed will be at the discretion of the Installer; the installed monitor must be able to capture and provide the data required by EECA.
  - Where monitoring equipment is required, the Installer will be paid \$1,000 excluding GST for each installation to cover the cost of equipment, installation and reporting. This monitoring cost can be claimed as a reimbursement on completion of the project alongside invoicing for co-funding.
- Where equipment provided for installation has in-built monitors; the equipment must be able to capture and provide the data required by EECA. The installer will be paid \$500 excluding GST for each installation to cover the cost of reporting.
- Two reports are required:
  - Six months from the date of equipment installation
  - Twelve months from the date of equipment installation

#### What we need

To implement this programme, EECA is seeking to engage capable hot water heat pump Installers under a panel agreement that will last until the 30th of June 2024 from the commencement date and annually thereafter for four years following review by EECA with no right of renewal. There are 5 key features to delivering the pilot:

- Identifying and approaching suitable business to participate in the programme.
- Conducting site evaluations and reporting finding, including costs for proposed work back to EECA through the webform.
- Presenting EECA's subsidised equipment offer back to businesses.
- Arranging and managing the installation of hot water heat pump systems, equipment and the removal of existing systems (where applicable) and their safe, sustainable and appropriate disposal.
- Completing the installation, invoicing EECA for its agreed contribution and providing monitoring reports where required.

#### What we don't want

EECA will not accept alternative proposals for increased scope of delivery or partial solutions. Before submitting its proposal, each supplier must be confident that it satisfies all pre-conditions.

### What's important to us?

EECA requires Installers to demonstrate the following attributes and capabilities:

- An ability and willingness to work collaboratively with the EECA and all other stakeholders throughout the supply chain to achieve the programmes objectives.
- Evidence of delivering on time, to budget and to the required standard
- Strong relationship management skills, data management and reporting systems.

Your commitment to this programme is particularly important to EECA. You will be the programme's representatives to customers and your company and personnel's knowledge of the programme, professionalism and commitment to its outcome will determine the programme's success.

### Why should you bid?

This is an opportunity for your business to continue to be at the forefront of heat pump technology and with a Government incentivised scheme to turbo charge the change. We need businesses to act now and switch from fossil fuel burning equipment to modern efficient technology; we don't have time to wait for old equipment to reach the end of its life. This is an opportunity for hot water heat pump Installers to be part of a nationwide initiative that seeks to help businesses act now to make a change for good. Panel participants will be acting as climate change leaders promoting the benefits of heat pumps to heat hot water for the benefit of all New Zealanders.

#### A bit about us

EECA is a Crown Agency whose purpose is to *mobilise New Zealanders to be world leaders in clean and clever energy use*. We aim to achieve a sustainable energy system that supports the prosperity and wellbeing of current and future generations. EECA works to create positive change across systems using a combination of three important levers – co-investing, motivating people and regulation.

# **SECTION 1: Key Information**

#### 1.1 Context

This Request for Proposals (RFP) is an invitation to submit a proposal for inclusion on The Equipment Replacement Scheme – Hot Water Heat Pump Installer Panel (the Panel).

This RFP is a single-step open procurement process. EECA will evaluate all proposals submitted and endeavour to establish a panel structured as below:

#### 1.2 Our timeline

**Supplier Engagement Session** 

Here is our timeline for this RFP (all are New Zealand times and dates):

Deadline for Questions	5:00pm 19-04-23

10:00am 18-04-23

Deadline for us to answer questions	21-04-23
-------------------------------------	----------

4-05-23
1

Successful Respondent(s) notified (	indicative)	WC 29-05-23

Proposals will be evaluated at the conclusion of the tender, those responses which meet all pre-conditions, the requirements of the tender and due diligence will be appointed to the panel.

#### 1.3 How to contact us

- a) Contact us through our Point of Contact via email or the Government Electronic Tenders System (GETS).
- b) Our Point of Contact:

Name: Brad McMeekin

Title/role: Senior Procurement Advisor Email address: applications@eeca.govt.nz

# 1.4 Developing and submitting your Proposal

- a) This is an open competitive tender process.
- b) Take time to read and understand the RFP.
- c) Take time to understand our Requirements. These are in SECTION 2: of this document.

- d) Take time to understand how your Proposal will be evaluated. See SECTION 3: of this document.
- e) For resources on tendering visit <a href="https://www.procurement.govt.nz/suppliers-2/">https://www.procurement.govt.nz/suppliers-2/</a>
- f) If you have questions, ask our Point of Contact before the Deadline for Questions.
- g) Use the Response Form attached to this Proposal.
- h) Complete and sign the declaration at the end of the Response Form.
- i) Check you have provided all the necessary information in the correct format and order.
- j) Submit your Proposal before the Deadline for Proposals.

### 1.5 Supplier Engagement

EECA is hosting a one hour market briefing session on 10:00am-11:00am, Tuesday 18<sup>th</sup> April on Zoom. During this time EECA will explain the purpose of the Hot Water Heat Pump programme and provide a step-by-step outline of how the programme will run. There will be 30-minutes for questions. At the end of the session questions and answers will be published.

We strongly encourage attendance at the session. For those who are unable to attend the briefing session, a copy of the presentations and a summary of any questions and answers from the meeting will be posted on GETS after the event (any supplier names and identifying company information will be removed).

If you are interested in attending the briefing session please register your interest by emailing;

#### applications@eeca.govt.nz

Include:

- Organisation name,
- Organisation home region,
- Number of attendees

Registrations close at 5:00pm on Friday 14<sup>th</sup> April 2023

# 1.6 Address for submitting your Proposal

All tender responses must be made through the GETS website <a href="www.GETS.govt.nz">www.GETS.govt.nz</a> or through the <a href="majorage-applications@eeca.govt.nz">applications@eeca.govt.nz</a> email address. If using the applications inbox to submit your response, please make sure you put the name of the tender in the subject line of the email.

Tender documents will also be available for download at: <a href="https://www.eeca.govt.nz/co-funding/join-the-equipment-replacement-scheme">https://www.eeca.govt.nz/co-funding/join-the-equipment-replacement-scheme</a> It is recommended that the uploading process be undertaken with sufficient time to allow the upload to complete before the deadline for tenders. Tender size is limited to 50MB.

We will not accept proposals sent by post or delivered to our office.

Make sure you include all attachments and reference material.

#### 1.7 Our RFP Terms

#### a) Offer Validity Period

By submitting a Proposal, the Respondent agrees that their offer will remain open for 4 calendar months from the Deadline for Proposals.

#### b) RFP Terms

By submitting a proposal, the Respondent agrees to the RFP-Terms described in the attached document.

Remember, if a Respondent commits a non-trivial breach of the RFP-Terms, we may exclude them from further participation in the RFP process, whether or not that requirement is contractually binding.

### 1.8 Later changes to the RFP or RFP process

- a) After publishing the RFP, if we need to change anything or provide additional information, we will let all Respondents know by placing a notice on GETS or contacting Respondents by email.
- b) If you downloaded the RFP from GETS you will automatically receive notifications of any changes through GETS.

#### 1.9 Defined terms

These are shown using capitals. You can find all definitions at the back of the RFP-Terms.

# **SECTION 2: Our Requirements**

# 2.1 Background

A key initiative of EECA is the Equipment Replacement Scheme (ERS) which was set up to support decarbonisation, by small to medium enterprises, and improve energy efficiency of smaller, less complex but more prevalent energy using technologies and processes. This means supporting Industry and working with businesses to optimise their energy use through Energy Insights and where possible, support their transition to low carbon alternatives through the adaption of new technologies and commercial offerings.

The Hot Water Heat Pump Scheme is a co-funding programme which seeks to accelerate the uptake of heat pump technology to replace fossil-fuelled and inefficient hot water boilers in New Zealand through an equipment replacement subsidy scheme. The scheme is aiming to replace smaller existing califont instant/ ondemand hot water boilers, other fossil-fuelled boilers and electric boilers with small to medium (15 – 50 kW) 'air-to-water' heat pump hot water systems.

### 2.2 Key outcomes

Key Outcomes EECA want to achieve are:

- a) To deliver carbon emissions reduction of 239,054.3 tCO2e by 30 June 2028, contributing to meeting New Zealand's climate change commitments.
- b) To deliver anticipated energy savings of 691.6 GWh by June 2028 to enable a just transition from fossil fuels.
- c) To develop working relationships with and an understanding of organisations that operate in the hot water heat pump value chain that can be leveraged on throughout the Equipment Replacement Scheme.
- d) To overcome customer and supply chain barriers with credible information and incentives thereby ensuring successful uptake of the scheme.
- e) To evaluate and improve co-funding methodologies and procurement approaches through a post implementation process review.

### 2.3 What we require

#### **Description of the Requirements**

Installers who are appointed to the panel will be required to deliver the following:

- Complete any training and/or other requirements deemed necessary by the suppliers whose equipment meet the EECA Heat Pump requirements to be able to meet the requirements to ensure full manufacturer's warranty is available.
- Attend a one-hour online supplier training session.
- Provide high quality customer service.

- Provide quality, cost-effective supply and installation of hot water heat pumps that meet the minimum product requirements.
- Provide onsite evaluations in line with EECA's evaluation criteria
- Accurately size, scope and price each installation.
- Provide a full installation warranty and any related backup service(s) that is valid for 12 months.
- Install monitoring devices as and when required.
- Undertake/oversee the decommissioning of the existing heating system and arrange for safe,
   sustainable and appropriate disposal of plant and associated waste.
- Maintain accurate records and allow open access to EECA's auditors.
- Obtain consents from customers for EECA access, use and sharing of data gathered from installed equipment monitors.

#### a) Track Record

EECA is looking for Installers who have experience and a track record of delivering projects on time to specified standards and on budget, Installers are asked to provide:

- Demonstrable competence and experience providing work in one or several commercial hot water heat pump end uses in a commercial and/or industrial environment.
- Demonstrable experience in the installation of hot water heat pumps by:
  - I. Identifying energy efficiency opportunities in commercial/industrial heat pump systems.
  - II. Managing the installation and delivery of commercial hot water heat pump appliances.
- Experience delivering programmes/projects where there is a strong focus on:
  - I. Health and safety processes and procedures.
  - II. Stakeholder management.
  - III. Robust reporting frameworks.

#### b) Capability

We are seeking Respondents that can demonstrate the following skills and expertise:

- Site evaluations to determine the viability of installs and appropriate sizing of system solutions.
- Installation of equipment that meets the minimum requirements of EECA
- A manufacturers accreditation for installation that ensures the terms and conditions of any warranty are valid
- Meet all Health and Safety requirements.

- The need for sites to be left in a safe and tidy condition.
- The ability to undertake/oversee the decommissioning of the existing heating system and arrange for safe and appropriate disposal if required.

#### c) Required Solution

We are looking to appoint Installers to the panel with the capacity, capability, and commitment to enable EECA to achieve its key outcomes and deliver the programme by June 2024.

Respondents will be required to demonstrate and/or provide the following:

- Established escalation protocols & issue resolution processes.
- Clear process for the replacement of product failures/faults
- Have robust quality assurance and auditing processes.
- Have in place administration systems, including checks for accuracy and completeness.
- Evidence of installation and disposal of decommissioned plant i.e. photographs of install and receipts of disposal.

#### **Monitoring**

For those projects selected for monitoring Installers are asked to:

- a. Gain written permission from the end user to use a monitoring device to collect the following information:
  - Energy consumption
  - Supplied hot water volume and temperature.
- b. Where the equipment provided for installation does not have monitoring capability the Installer is asked to source and install a monitoring device that can capture the information.
- c. Provide two reports to EECA in an agreed format on energy consumption and supplied hot water and temperature per monitored project at six months and twelve months post installation.

#### **Evaluation**

When a consumer agrees to a co-funding evaluation, the Installer will collect the following information and enter it into the webform:

- Fuel type of existing equipment
- Energy use for the last 12 months (in KWh or GJ)
- Energy cost for the last 12 months (in \$/KWh or \$/GJ or \$ total)
- Year the existing equipment was installed.
- Estimated maintenance cost (for the last 12 months or lifetime of existing equipment)
- Maximum litres of water used per hour.
- Average litres of water used per day.

- Average Inlet temperature (if Inlet is not ambient)
- Average Outlet temperature (Demand outlet and temperature or Unit's outlet and temperature)
- Storage tank capacity if a storage tank is required.
- Number of hot water heat pump units to be installed.

#### d) Capacity

We are seeking Installers that can demonstrate the capacity to deliver multiple installations by 30 June 2024. This requires sufficiency of resource in terms of personnel, management/technical services and installation and the ability to build a pipeline of demand.

Respondents will be required to identify who will be performing the onsite evaluations, installations and indicate which region(s) they have a local presence in.

#### e) Broader Outcomes

In October 2019, the Government incorporated four new priority outcomes in the Government Procurement Rules. EECA must consider, and incorporate where appropriate, these broader outcomes when purchasing goods and services.

Broader outcomes are the supplementary benefits that are generated from the procurement activity. Respondents are required to demonstrate in their proposal what they are doing as an organisation to achieve the following Government Procurement Broader Outcomes:

- Training, apprenticeships and/or cadetships and upskilling opportunities for employees. Of interest are any initiatives or pathways that support growth in number and capability of Māori and Pasifika in the workforce and seek to attract and develop a regional workforce.
- Environmental sustainability measures to reduce fuel consumption and CO2 emissions.
- Bespoke and innovative initiatives that provide social, cultural, economic, environmental or community outcomes.

#### **Public Liability Insurance**

The Installer is responsible for ensuring its risks of doing business are adequately covered by insurance.

#### **Supplier Code of Conduct**

The Government is committed to sustainable and inclusive government procurement that delivers for New Zealand and New Zealanders. This Supplier Code of Conduct outlines the expectations the Government have of Government suppliers.

As part of the tender process the Respondent is required to confirm that if they are successfully appointed, they will comply with the Code of Conduct and will also require must make their subcontractors/ subconsultants aware of this code.

#### 2.4 Other information

Payments will be made on the 20th of each month subject to invoices being provided no later than five business days before this date.

### 2.5 Panel Agreement term

We expect that the Panel Agreement will commence when both parties sign. The anticipated Panel Agreement term and options to extend are:

Description	Years
Initial Term of Panel	1 year
Options for EECA to extend the panel	1+1+1+1(4)
Maximum term for the panel	5 years

#### 2.6 Contract value

We estimate (subject to demand and ability of all parts of the supply chain to apply) the total value of Panel Agreements to be \$22M plus GST for the initial 12-month period which is part of a total ERS budget of \$330M.

#### 2.7 Other tender documents

These documents have been uploaded on GETS and are available to Respondents – they form part of this RFP. These include:

- 1) RFP Response Form
- 2) RFP Terms and Conditions
- 3) Appendix 1: Pre-Conditions Response Form
- 4) Appendix 2: Relevant Experience and Track Record
- 5) Appendix 3: Process Map to Customer
- 6) Appendix 4: Co-funding Model
- 7) Appendix 5: Minimum Equipment Requirements
- 8) Appendix 6: Draft Panel Agreement
- 9) Supplier Code of Conduct

10) Supplier Code of Conduct - Questions and Answers

# 2.8 Delivery Locations

This programme is to be delivered on a national level.

# **SECTION 3: Our Evaluation Approach**

This section sets out the Evaluation Approach that will be used to assess Proposals.

#### 3.1 Initial Checks

The Senior Procurement Advisor will undertake an initial review of the proposals to establish compliance and completeness. A compliant proposal must:

- Meet all pre-conditions.
- Include a signed declaration.
- Pass the Declaration check.
- Submission of a full suite of required documents.

EECA reserves the right to put aside any responses that are non-compliant or materially incomplete from further assessment. As part of the initial check a review of the preconditions will be undertaken.

Any response deemed by EECA at its sole discretion to have not meet the pre-conditions will be put aside from further consideration.

#### 3.2 Pre-conditions

Each proposal must meet the following pre-conditions. We will not consider proposals which fail to meet these conditions.

#	Pre-Conditions Pre-Conditions
1	Please confirm that you have completed at least 10 installs of hot water heat pumps 15-50KWs, or similar on commercial buildings in the last 18 months and provide a list of 10 customers where these installs occurred.
2	<ul> <li>You must confirm that your company is a full-service supplier, i.e. you manage the entire process, including:</li> <li>accurately scoping and pricing each installation.</li> <li>supplying and installing the hot water heat pumps.</li> <li>training the end users in its use; and providing warranty and back up service.</li> </ul>
3	Confirm that your company is accredited by at least one heat pump equipment supplier that can meet our product requirements
4	Please provide evidence of a Health and Safety pre-qualification from either IMPAC PREQUAL (60% +), SHE PRE-QUAL or SiteWise (75% +) that is appropriate to the size of the business, operating model (use of subcontractors) and the work being undertaken. If using subcontractors, evidence of their H&S pre-qualification must also be provided.

	Note: More details on this requirement are requested in the scored Non-Price Attributes section.
5	Please confirm that you have a system for handling complaints and customer liaison.  Note: More details on this requirement are requested in the scored Non-Price Attributes section.
6	Please confirm your company's compliance with the NZ Government Supplier Code of Conduct.

# 3.3 Evaluation Model

All compliant Responses will be evaluated on the criteria listed below:

Criteria	Weighting
Pre-conditions Pre-conditions	Pass /Fail
Refer to the table in section 3.2 pre-conditions and Appendix 1: Pre-conditions response form.	
1. Track Record	30%
1.1 Experience and track record of delivery. Refer Appendix 1: Response Template	30%
2. Capability	
2.1 Organisational Overview	20%
2.2 Key Personnel	
2.2 Health & Safety Policies and Procedures	
3. Proposed Solution	
3.1 Quality Assurance and Auditing Processes	
3.2 Innovation	30%
3.3 Systems and processes	
3.4 Waste Disposal	
3.5 Public Liability Insurance	
4. Capacity	
4.1 Organisational Structure	10%
4.2 Sufficiency of Personnel	
5. Broader Outcomes	
5.1 Workforce: Māori, Pasifika and Regional Development	10%
5.2 Environmental Sustainability	
5.3 Innovation	

The evaluation model is a "weighted attribute" model. Responses will be evaluated at the conclusion of the tender advertising period those responses which meet all pre-conditions, and the requirements of the tender will be appointed to the panel. Where a plus or minus 2 differential in individual scoring exists EECA will convene the evaluation panel for moderation.

All Proposals that meet the pre-conditions are evaluated using the evaluation model.

Suppliers must score 6 or above in track record, proposed solution, capability and capacity evaluation criteria for the supplier to be recommended for panel membership.

The tender will remain open for 18 business days, at any time, at the sole discretion of EECA the tender close date may be extended based on the demands of the programme. The panel membership numbers will not be capped, and a may be re-opened in the first 12 months following panel establishment.

#### 3.3 Clarifications

It is intended that, where appropriate, Installers are provided an opportunity to provide clarifications, to support EECA's evaluation being as accurate as possible. This will be in response to evident minor omissions or ambiguity in a compliant response.

EECA will determine whether to invite further clarifications from Respondents at its sole discretion. EECA does will not seek further clarifications where initial responses are non-compliant.

### 3.4 Scoring

The following scoring scale will be used in evaluating Proposals. Scores by individual panel members may be modified through a moderation process across the whole evaluation panel.

Rating	Definition	Score
EXCELLENT	Respondent demonstrates exceptional ability, understanding, experience and skills. The Proposal identifies factors that will offer potential added value, with supporting evidence.	9-10
GOOD	Respondent demonstrates above average ability, understanding, experience and skills. The Proposal identifies minor additional benefits, with supporting evidence.	7-8
ACCEPTABLE	Respondent demonstrates the ability to meet the criteria, with supporting evidence.	5-6
RESERVATIONS	Satisfies only a minimum of the criteria but not all. Reservations about the Respondent to adequately meet the criteria. Little supporting evidence.	3-4
SERIOUS RESERVATIONS	Extremely limited or no supporting evidence to meet the criteria.  Minimum effort made to meet the criteria.	1-2

### 3.5 Compliance

Proposals will be checked for compliance with the RFP conditions, including whether the submission:

- Has arrived in advance of the RFP closing date and time.
- meets compliance requirements i.e., format, signatures and requested attachments are provided.
- Is complete, sufficient in content/quality and/or provides a response to each component of the Response Forms. If a submission is manifestly short of the required standard, a recommendation may be made that it should not proceed to the full evaluation process; and
- Is relevant to the scope and/or Requirements out lined in this RFP. If a submission is manifestly not relevant, a recommendation may be made that it should not proceed to the full evaluation process.
- Conflicts of interest declared or identified by Respondents will also be considered and compared to internal, declarations already made. Any material issues will be raised with the relevant Respondent.

At our discretion, we may decide to progress or not progress any non-compliant response to the next stage of the process.

### 3.6 Due Diligence

EECA may undertake the following due diligence in relation to shortlisted Installers. The findings will be considered in the evaluation process. Should we decide to undertake any of these we will give Installers reasonable notice.

- a) reference check the Respondent, any other organisation and named personnel in the response.
- b) interview the respondent or any other organisation they propose to use.
- c) complete relevant health and safety checks including, but not limited to, assessing the robustness of the respondent's or any other organisation they propose to use health and safety documentation and processes against industry standards.
- d) other checks against the respondent or other organisation they propose to use e.g., Companies Office
- e) request the respondent make a presentation.
- f) inspect audited accounts for the last three financial years.
- g) undertake a credit check.
- h) product testing undertaken by a EECA appointed third party.

# **SECTION 4: Pricing information**

# 4.1 Pricing information provided by Respondents

There is no pricing information required from the Respondent.

# **SECTION 5: Our Proposed Panel Agreement**

# **5.1** Proposed Panel Agreement

The Panel Agreement that we intend to use for this procurement will be provided as an addendum WC 10<sup>th</sup> April 2023.

In submitting your proposal, you must let us know if you wish to question any of the terms or conditions in the Proposed Panel Agreement or wish to negotiate new terms or conditions.

The RFP Response Form contains a section for you to state your position. If you do not state your position, you will be deemed to have accepted the terms and conditions in the Proposed Panel Agreement in full.

# **SECTION 6: RFP Terms and Conditions**

View RFP terms dated June 2021 attached to this tender.