

Minimum Qualifications

Regional General Contractors (RGC) play a key role in ensuring Indiana Energy Saver Program (IESP) projects are properly scoped and installed. By overseeing IESP projects in one of the three state regions, RGCs will provide installation coordination, ensuring efficient and streamlined service to IESP participants. Within their assigned regions, RGCs will be responsible for defining a scope of work based on the eligible measures identified during the IESP energy assessment and assigning work to Qualified Contractors in their region. In addition, RGCs are expected to consistently communicate with the IESP staff and ensure compliance with all local, county, state, and federal regulations.

For IESP projects, RGCs will coordinate with Qualified Contractors in their region to assign work opportunities and ensure the completion of work orders. The RGC must ensure all Qualified Contractors in the region are given equitable opportunities to do work. For projects requiring multiple contractors, the RGC will develop and coordinate project schedules, overseeing all project contractors to ensure the installation activities comply with program requirements and all local, county, state, and federal regulations. To facilitate this work, RGCs must have the capacity to execute multiple concurrent contracts with homeowners and Qualified Contractors.

In addition to overseeing the installation of IESP projects, the RGC is responsible for paying contractors within 14 calendar days of receiving an approved work order completion form and verifying the installation by the Qualified Contractor. RGCs must demonstrate that they have the financial capacity and systems to make payments to multiple contractors using their funds while awaiting reimbursement from the IESP.

RGC Selection Process

After reviewing a base package of information to determine if the RGC candidate has the required capabilities, the IESP team will score the application. The top-ranked RGCs will participate in a final in-person interview. During this interview, the RGC candidate will be asked to give a presentation outlining their approach to two project scenarios, which the IESP team will provide in advance. Candidates will also have time to introduce key staff and describe how they would plan to manage their region and engage with IESP staff. This final interview aims to further evaluate a candidate's capacity based on the submitted materials and demonstrate how a candidate would plan to meet the program's expectations for maintaining compliance, schedules, and budgets. Following the final in-person interview process, the candidate's presentation will be scored by the panel. Based on the cumulative score of the panel, the IESP will then select the top 3 firms and assign them to a region.

Required Documentation Used to Select Regional General Contractors

Prospective Regional General Contractors will be required to provide the IESP with documentation to demonstrate they meet or exceed the following qualifications:

- Qualified to do business in Indiana
- Ability to obtain local and state building permit when applicable
- Ability to work on federally funded projects as tracked by SAM.gov

Supporting Documentation Used to Select Regional General Contractors

Prospective Regional General Contractors must provide documentation demonstrating experience in the following categories. Supporting documentation may be provided in narrative format and can include tables or attachments.

When responding in a narrative format, please include clear headings to denote each category. Responses need to address all applicable items listed in each category and contain sufficient detail to address the request. Outside of tables or attachments, narrative documentation cannot exceed 12 pages.

Provide Documentation That Shows or Demonstrates:

Housing and Grant Program Experience

- Describe prior experience working on multiple concurrent projects across large geographic areas.
- Describe prior work on federally funded programs. Include the name of the program and role.
- Describe your experience with federal grant-funded projects where you oversaw contractors.
- Describe your experience working on state-run programs. Include the name of the program and role.
- Provide examples of how your firm ensured compliance with local, county, state, and federal regulations at the property level.
- Describe your experience projects in low-income areas.

Homeowner Contracting Experience

- Provide examples of projects you have managed with multiple concurrent homeowner contracts.
- Provide the maximum number of contracts with active construction or installation activities occurring simultaneously in the past five years.
- Provide the total number of contracts executed with homeowners and multifamily landlords to perform work. Minimum of 20.

Staffing Capacity

- Provide details of any architecture and engineering (A/E) or (MEP) capacity you plan to have for the Program, whether using in-house resources or through a partner firm.
- Provide project management, project administration, technical staff, and construction administration capacity of your firm, including the total number of people.
- Summarize the roles of key personnel for this program.
- While not required, provide details about any staff credentialed to perform residential energy audits or energy inspections, including their certifications.
- While not required, provide details about any staff with residential energy efficiency expertise. Describe the work performed.

Energy Efficiency Project Experience

- Describe any projects with similar scopes of work, such as installing energy efficiency upgrades and retrofits for residential, multifamily buildings, and public housing facilities that attained the targeted performance metrics. Preferred experience includes installation of HVAC, heat pump HVAC, water heater upgrades, air sealing and insulation weatherization, and replacement of Energy Star-certified appliances.
- Describe your experience with residential or building energy efficiency projects. This could include but is not limited to state-funded weatherization, HUD Green Building Checklists, solar or LEED projects.

- Describe your team's knowledge and experience with projects requiring energy inspections and audits. Experience with BPI-2400 calibration and ASHRAE Level II standards is preferred.
- Provide examples demonstrating the ability to define a scope of work with engineered specifications using a single-family or multifamily property energy audit.
 - For more complex multifamily properties, RGCs must have in-house architecture and engineering capacity (or access to this from a partner) to design and engineer appropriate system-wide energy efficiency measures.
- Provide examples demonstrating the ability to perform quality workmanship and abide by warranty requirements and resolution procedures.

Project and Construction Management Experience

- Describe what project management, scheduling and cost control systems you use to provide project services.
- Describe your cost estimating experience. Experience with single-family and large multifamily buildings is preferred but not required.
- Provide an example(s) and details of any multifamily or large projects in which you developed a progress schedule to depict the steps and timeline for completing the project work.
- Provide examples of successful progress schedules.
- Describe your experience providing installation or construction management in residential buildings, including single-family and multifamily projects. If you have previous experience working with public housing authorities, please include those experiences.

Working with Subcontractors

- Demonstrate your experience overseeing multiple contractors on concurrent projects. Include the number of subcontractors by project.
- RGCs will be required to establish a contractor team using Qualified Contractors from the IESP Qualified Contractor Network. Qualified Contractors will be required to perform work at a property within 14 days of signing an agreement with a property owner. Provide examples demonstrating:
 - How you have developed contractor teams to conduct work on a property within the 14-day period.
 - Projects that require utilizing contractors to achieve a federal or state spending or participation set-aside. Primarily small business, veteran-owned business designations (XBE, women and minority-owned businesses, etc.)
 - How you allocate work to subcontractors for projects.
 - How you monitor subcontractors' progress on a project.

Financial Considerations

RGCs are responsible for submitting payment requisitions to the program for reimbursement. RGCs will pay Qualified Contractors when all assigned work has been completed and verified by the RGC. The Regional General Contractor must make payments within 14 calendar days of receiving a Qualified Contractor's invoice for a completed and approved installation. The RGC must be able to float the project costs for approximately 45 days after the installation to accommodate the post-installation verification and quality assurance inspection process. As a result, RGCs must have financial liquidity, a robust records management system, and internal controls in place to be able to make payments to multiple contractors before receiving reimbursement from the IESP.

- Provide documentation showing financial capacity to procure materials utilized by contractors on projects and to track sub-contractor work and coordination on projects.
- Provide evidence of current bonding capacity in compliance with levels shown in the Terms and Conditions

- Demonstrate the capacity to float the payroll for Qualified Contractors until work is completed.
- Please indicate any previous names for the firm (or branch office) within the last five years. Please provide the firm history, including the year established, ownership structure, the profile of the firm's experience in construction and project management, the annual average revenue for the last five years, and any relevant judgments or findings in the court systems in the United States.