

Request for Proposal (RFP) Customer Service System

Green Venture Home Energy Program Expansion Project

Green Venture would like to expand our home energy conservation programs to become the leader in providing homeowners in our region with the advice and incentives they require to retrofit their homes to protect the climate in a way that is cost effective and improves quality of life.

Green Venture's energy programs support homeowners to reduce greenhouse gas emissions and protect the climate. To meet municipal climate goals by 2050, approx. 98% of residential buildings built before 2017 need to be retrofitted to achieve a minimum of 50% energy savings. We aim to scale up to meet increased needs for energy audits and retrofits to support climate action.

About Green Venture Energy Programs

We currently provide energy auditing services via NRCan trained/licensed Energy Advisors, who determine a EnerGuide rating (measure a home's energy efficiency) and provide advice to homeowners to make homes more efficient, and apply for rebates. We also provide bundled one-stop energy auditing, retrofit management, and post-retrofit assessment services in partnership with Enbridge with our Low-Income Winterproofing Program for qualifying households in the Niagara Region.

For more information on Green Venture, please visit greenventure.ca.

Home Energy Program Expansion Project

Green Venture has been awarded funds by the Investment Readiness Program to prepare to expand our energy programs so that we can support more home retrofits in the communities we serve to reduce greenhouse gas emissions and protect the climate. These funds will be used for the following activities.

- Activity 1. To assess the market for home energy retrofits and identify opportunities and strategies for expansion.
- Activity 2. To develop business plan that provides a roadmap for expansion
- Activity 3. To prepare for expansion by developing and implementing improved systems for client engagement and managing the energy audit workflow.
- Activity 4. To prepare for expansion by recruiting and training more Registered Energy Advisor

This RFP is for Activity 3. Activities 3 and 4 will be informed by Activities 1 and 2.

The Investment Readiness Program

Funded by the Government of Canada, the Investment Readiness Program (IRP) supports social purpose organizations as they contribute to solving pressing social, cultural and environmental challenges across Canada.

Its goal is to help social purpose organizations build their capacity to participate in Canada’s growing social finance market and prepare for the Government of Canada’s broader investment in social finance via the [Social Finance Fund](#).

Contractor(s) Role

Green Venture is seeking service providers to provide strategic advice in support of our Home Energy Program Expansion Project in the Niagara, Hamilton, Halton Region. The work has been divided into three Tasks. Service providers may quote on any or all of the tasks.

Task	Scope of Work	Deliverables
Customer Service System Design and Enhancement	Design an effective and efficient workflow. Design customer service interface, including webpage, phone system and customer database.	Customer Service System Plan: <ul style="list-style-type: none"> ● Workflow optimization and documentation ● Webpage integration & SEO ● Customer Relationship Management software or specification ● Customer service templates & scripts ● New phone software or specification ● New phone hardware or specification
	Design and cost customer service interface	
	Prepare procedures, scripts, email templates and training materials for customer service and administrative staff	

Engagement Period The project is expected to take place between May 1, 2021 to June 30, 2021

Budget

The budget for this work is between \$4,875 and \$7,500.

Deadline (NEW)



Proposals will be reviewed as they are received. Please contact heather.donison@greenventure.ca with your intention to submit an application as soon as possible.

Proposal requirements

Firm or Independent Consultant Information

Please provide your firm's name, address, website and telephone number including information on the individual who will serve as your firm's primary contact. Include a brief description and history of your firm. Please include a summary of job title and experience of all key staff involved.

Approach

Please explain your project approach, style and process.

References

Proposals should include a list of at least 3 references for similar projects.

Schedule, Timeline and Budget

Proposals should include the proposed work schedule, timeline, deliverables and budget. The contract is expected to begin in April 2021 and must be completed in June 30, 2021.

Submissions

All proposals should be submitted via email to:

Giuliana Casimirri, Executive Director
Green Venture
22 Veivers Dr., Hamilton ON
Email: director@greenventure.ca

Any questions can be directed to **Heather Donison** heather.donison@greenventure.ca