



REQUEST FOR PROPOSALS

for Retrofit Management Service Providers
for the Built to Last Program

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1. Purpose

The purpose of this Request for Proposals (“RFP”) is to solicit pricing proposals from housing retrofit service providers (“Contractor”) who can deliver one or more professional services for the Philadelphia Energy Authority’s Built to Last (BTL) program. These services include:

- (a) Intake Services
- (b) Home Assessment and Project Development
- (c) Construction Management

The Program Team expects to select Contractors with this RFP for an initial contract term through December 2029, with the option to renew for up to two additional one-year terms (December 31, 2031).

2. Background

2.1 Definitions

Applicant: A Philadelphia resident who has filled out an Expression of Interest for BTL; applied for BTL through One Philly Front Door; has been referred to BTL by a BTL Team Member, or; who has otherwise sought BTL services.

BTL: Built to Last

BTL Implementers means PEA, PGCC, BTL Team Members, Retrofit Managers, PGCC Contractors, and their respective subcontractors of any tier, coventurers and agents engaged in implementing the Program.

BTL Retrofit Manager: An agency assigned by PEA to provide one or more of the following services for an Applicant or Participant: Intake Services, Inspection and Project Development Services, Construction Management Services.

BTL Team Member: a service provider that funds, delivers, and/or facilitates delivery of building services to low-income single family residential properties, and which partners with BTL to offer these services to BTL Participants

Participant: a household that has completed an application for the BTL program and qualifies for program services

PEA: Philadelphia Energy Authority

PGCC: Philadelphia Green Capital Corp

PGCC Contractor: A general contractor who has been vetted by the Built to Last program to provide work funded by PGCC. Sometimes referred to as a GC.

PGCC Work: The portion of a Project repairs and home improvement upgrades that are performed by a PGCC Contractor and paid for by PGCC, also called the Project Scope or Scope of Work.

PPA: Program Participant Agreement

Program Team: PEA and PGCC, collectively

Project: All Retrofit work performed in a Participant's residence under the BTL Program.

Project Scope or Scope of Work: also known as the PGCC work, the portion of a Project's repairs and home-improvement upgrades that are performed by a PGCC Contractor and paid for by PGCC. This scope is a subset of the larger Retrofit Work scope which also includes work completed by BTL Team Member programs

Retrofit Work: All work needed in a Participant's home that can be performed by the BTL Team Member services and PGCC Contractors.

QCL: The Qualified Contractor List is the pool of PGCC Contractors who have been vetted by the Built to Last program to provide work funded by PGCC.

2.2 About the Philadelphia Energy Authority

Philadelphia Energy Authority (PEA) is an independent municipal authority advancing projects and programs that deliver on the City of Philadelphia's most urgent priorities: lower bills, stronger infrastructure, safer neighborhoods, and quality jobs. Since 2016, PEA has supported over \$1.3 billion in investment, creating more than 11,000 jobs in Philadelphia and driving \$2.4 billion in economic benefits across Pennsylvania. Learn more at philaenergy.org.

PEA is a municipal authority and political subdivision of the Commonwealth of Pennsylvania, formed by the City of Philadelphia under the Pennsylvania Municipality Authorities Act, 53 Pa.C.S. § 5601 et. seq. ("the Act") for the purposes described in the Charter and included below:

The Authority's purposes and responsibilities shall be limited to actions for and concerning (i) the development, facilitation and/or financing of energy storage and/or generation projects, (ii) the development, facilitation and/or financing of energy efficiency projects, and (iii) the purchase or facilitation of energy supply and energy services on behalf of the City of Philadelphia, government agencies, institutions and businesses, as well as the education of consumers regarding choices available in the marketplace, and (iv) the promotion of a vital clean energy sector of the Philadelphia economy and increased employment in the sector by undertaking efforts to strengthen the markets for energy efficiency and energy storage and generation projects. The Authority shall have and may exercise all of the powers set forth in the Act that are necessary or convenient for carrying out its purposes and responsibilities.

2.3 About Philadelphia Green Capital Corp.

Philadelphia Green Capital Corp (PGCC) is a Pennsylvania nonprofit corporation that is qualified as a 501(c)(3) charitable organization to make and facilitate grants and program-related investments for environmental action. PGCC is an affiliate of the PEA and co-operates multiple programs with PEA, including Built to Last. As a green bank in Southeastern Pennsylvania, PGCC's mission is to connect projects to capital to drive a robust, equitable, clean energy market in the region, support PEA, and respond to the local challenges of climate change. PGCC uses proven green bank tools to unlock capital

for clean energy projects, to scale and amplify PEA's current work, and to bring new financial products to the Southeastern PA region's clean energy economy. Learn more at phillygreencapital.org.

2.4 About Built to Last

The Built to Last Program (BTL), operated by the PEA and PGCC, seeks to improve the condition of an aging housing stock throughout Philadelphia. BTL serves single-family owner-occupied homes where the households earn 60% of area median income and below. The focus of the repairs includes:

- Habitability - to reduce risks of fire, structural failure, water damage, and excessive heat and cold exposure
- Health - to reduce risks associated with trip and fall hazards, mold, lead, and other environmental hazards
- Accessibility - to help people with mobility challenges live with safety and dignity
- Energy Efficiency - to improve affordability and resilience

BTL addresses three gaps that have historically prevented low-income households from receiving home interventions that fully meet their needs: a) ensuring households can find and apply for the full set of programs for which they are eligible, b) assessing and identifying all home restoration needs, and c) coordinating the deployment of services to streamline home restorations, avoid service deferrals, cover gaps in home repair needs, and maximize impact.

Built to Last coordinates services and layers home repair funding from a network of partners, collectively referred to as BTL Team Members. The Retrofit Service providers identified through this RFP, collectively referred to as BTL Retrofit Managers, will perform one or more services, including: intake, home assessment and project development, and construction management, as described in section 2.5. These services will support each participant through the Project life cycle, from application through Project completion.

2.5 Program Design

This section summarizes the key elements of the program. Please reference **Appendix A - Retrofit Management Agreement** and **Appendix B- Built to Last Procedures Manual** for a detailed description of the Contractor's responsibilities and PEA's commitments.

2.5.1 Intake Services

Screen Applicants for their interest and eligibility to participate in the Program and in the BTL Team Member services. Collect all required enrollment information and documentation necessary for determining Program eligibility.

2.5.2 Home Assessment and Project Development

Conduct a comprehensive basic systems, energy, and health assessment of each BTL participant home identifying the home's repair needs as well as opportunities for energy saving upgrades. In consultation with PEA staff and BTL Team Members, compile a recommended general scope of work for home improvements (the Retrofit Work) which also recommends which services are supplied by BTL Team Members and which are performed by a PGCC vetted contractor (the PGCC Work).

2.5.3 Construction Management

Complete the PGCC Scope that was initiated by the project developer by finalizing the installation details and budget. Assign, manage, and oversee the PGCC Contractor performing the Participant's PGCC Work. Serve as the primary point of contact for Participants throughout the course of their Project. Collect and manage all necessary Participant Project documentation. Collect and manage all necessary PGCC Contractor documentation and invoicing paperwork. Serve as PGCC's representative to review and confirm the quality of work completed by the PGCC Contractor through inspections and oversight. Coordinate with BTL Team Member program as needed to ensure streamlined service delivery.

2.6 Job Training and Equal Opportunity Hiring

Diversity and inclusion in business ownership and workforce composition are core values for PEA. People of color are under-represented in the home repair workforce and contractors typically report difficulty finding qualified candidates for open positions. To build a well-trained, diverse workforce in Philadelphia, PEA supports workforce development in Philadelphia. Built to Last Contractors will be provided with opportunities to interview training program graduates, engage with trainees (e.g. guest speaking), or hosting classes for a virtual or in-person field trip.

2.7 Anticipated Procurement Timeline

The following procurement timeline is intended to begin the process of contracting with and onboarding Contractors into the Built to Last program starting in November 2026 through this RFP. Respondents are strongly encouraged to submit responses in accordance with the timeline below. However, **PEA will accept responses on a rolling basis**. Those responses will be reviewed and processed on a timeline no faster than the days elapsed between steps described below, as the dates below refer to the initial timeline for Respondents.

Step	Date
RFP released	September 15, 2026
Deadline to submit RFP questions	September 25, 2026
Responses to questions posted	September 29, 2026
Deadline to submit Proposals	October 9, 2026 at 5pm EST
Contractor interviews (estimated)	October 19-23, 2026
Contractor selections announced (estimated)	October 30, 2026
Expected execution date for agreement	November 13, 2026

3. Questions, Proposal Format and Submission

3.1 Questions

All questions regarding Built to Last and this RFP must be submitted by email to BuiltToLast@philaenergy.org.

Responses to questions received before 5pm on Friday September 25, 2026 will be posted on the RFP page on the PEA website (www.philaenergy.org). Contractors responding to this RFP are urged to check the website for the responses to the questions. All responses will be issued by 5pm on September 29, 2026. Oral responses by any PEA employee or agent of PEA are not binding and shall not in any way be considered as a commitment by PEA.

3.2 Proposal Deadline

Respondents to this RFP must submit an electronic version of all requested documents by email to BuiltToLast@philaenergy.org with the subject "Built to Last RFP Response - [Firm Name]" no later than 5pm on Friday October 9, 2026. **We strongly encourage Respondents to submit their Qualifications by 5pm on Friday October 9, 2026 to be considered for the Procurement Timeline in section 2.7.**

3.3 Notice to State Requested Exceptions to Contract Terms and Conditions

PEA's Retrofit Management Agreement is attached to this RFP as **Appendix A**. By submitting a Proposal in response to this RFP, the Respondent agrees that, except as provided here, it will enter into a contract with PEA containing substantially the Contract Terms and Conditions contained in **Appendix A**.

If Respondent wishes to request revisions to the attached Contract, respondents must provide an annotated copy of the Contract with the requested revisions. For each requested revision, the Respondent must propose alternative language or terms using tracked changes and state the reason for the request in a comment.

Requested exceptions to PEA's Contract Terms and Conditions will be approved only when PEA determines in its sole discretion that a Requested Revision makes business sense, does not pose unacceptable risk to PEA, and is in the best interest of PEA. By submitting its proposal, the Respondent agrees to accept all Contract Terms and Conditions to which it does not expressly seek a Requested Revision in its proposal. Blanket reservation of rights to exceptions to the full contract will not be accepted. PEA reserves the right, in its sole discretion, to evaluate and reject proposals based in part on whether the Respondent's proposal contains Requested Revision to Contract Terms, and the number and type of such requests and alternative terms proposed.

If, after PEA issues its notice of intent to contract to a Respondent, the Respondent seeks Requested Revision to Contract Terms that were not stated in its proposal, PEA may, in its sole discretion, deny the Requested Revisions without consideration or reject the proposal.

PEA reserves the right, in its sole discretion, (i) to waive any failure to comply with the terms of this Notice if it determines it is in the best interest of PEA to do so; and (ii) to require or negotiate terms and conditions different from and/or additional to the Contract Terms and Conditions in any final contract resulting from this contract opportunity.

3.4 The Philadelphia Tax and Regulatory Status and Clearance Statement

It is the policy of the City of Philadelphia and PEA to ensure that each Contractor and subcontractor has all required licenses and permits and is current with respect to the payment of City taxes or other indebtedness owed to the City (including, but not limited to, taxes collected by the City on behalf of the School District of Philadelphia), and is not in violation of other regulatory provisions contained in the Philadelphia Code. To assist PEA, through the City of Philadelphia Department of Revenue and Department of Licenses and Inspections, in determining this status, each Respondent is required to submit with its proposal a Tax Clearance Certificate from the City of Philadelphia which can be requested at https://tax-services.phila.gov/_/#3.

If the Respondent is not in compliance with the City's tax and regulatory codes, an opportunity will be provided to enter into satisfactory arrangements with the City to achieve compliance. If satisfactory arrangements cannot be made, Respondents will not be eligible for award of the contract contemplated by this RFP.

The pre-approved Respondent will also be required to assist PEA in obtaining the above information from its proposed subcontractors. If a proposed subcontractor is not in compliance with City Codes and fails to enter into satisfactory arrangements with the City, the non-compliant subcontractor will be ineligible to participate in the contract contemplated by this RFP and the pre-approved Respondent may find it necessary to replace the non-compliant subcontractor with a compliant subcontractor. Respondents are advised to take these PEA policies into consideration when entering into their contractual relationships with proposed subcontractors. If a Respondent or a proposed subcontractor is not currently in compliance with the City's tax and regulatory codes, please contact the Revenue Department to make arrangements to come into compliance at 215-686-6600 or revenue@phila.gov.

Respondents need not have a City of Philadelphia Business Income and Receipts Tax Account Number (formerly Business Privilege Tax Account Number) and Commercial Activity License Number (formerly Business Privilege License Number) to respond to this RFP, but will be required to obtain both prior to commencing work if pre-approved for award of the contract contemplated by the RFP.¹ Applications for a Business Income and Receipts Tax Account Number or a Commercial Activity License² may be made online by visiting the City of Philadelphia Business Services Portal at <https://www.phila.gov/services/business-self-employment/register-a-business/> and selecting eCLIPSE to submit online applications. If you have specific questions, call the Department of Revenue at 215-686-6600 for questions related to City of Philadelphia Business Income and Receipts Tax Account Number or the Department of Licenses and Inspections at 215-686-2490 for questions related to the Commercial Activity License.

¹ Respondents that have a Business Privilege Tax Number should use that number, as it is automatically their Commercial Activity License Number, and need not apply for a new Commercial Activity License Number. Similarly, Respondents with a Business Privilege Tax Account Number should use that number as their Business Income and Receipts Tax Account Number.

² Commercial Activity Licenses are not typically required for non-profit organizations; however, Business Income and Receipts Tax Account Numbers typically are required.

3.5 Submittal Requirements

Respondents are encouraged to be concise and to respond as directly as possible to the requirements set forth in this RFP. The requirements set forth in this Section represent the minimum content required and, unless expressly stated otherwise, are not intended to limit substantive content. It is Respondent's responsibility to include information in the Proposal that meets the minimum content requirements and any additional information that further demonstrates relevant experience and capabilities.

3.5.1 Introduction and Executive Summary

Provide a summary of the major features of the Respondent's proposal. It should describe how the Respondent is best able to provide services that meet the PEA objectives. It should provide an overview of the planned approach and include a summary of the firm's experience with similar projects. This section should be limited to 3 pages and include the following details:

a. Contact information

- i. Business name
- ii. Contact name and title
- iii. Contact phone
- iv. Contact email

b. Business information

- i. Year business was established
- ii. FEIN
- iii. Commercial Activity License #
- iv. Other relevant licenses
- v. Legal structure (for-profit corporation, non-profit corporation, limited partnership, general partnership, limited liability corporation, sole proprietorship, other)
- vi. Business headquarters
- vii. Philadelphia address (if different than headquarters)
- viii. Website

3.5.2 Technical Submittal

Technical submittal requirements should include the following.

a. Experience and Capacity

- i. Services. PEA is seeking Respondents that can deliver one or more services listed in Section 2.5 and detailed in the Built to Last Procedures Manual, **Appendix B**. Describe which services the Respondent is proposing to deliver in its role as Contractor. For each scope, describe the volume of Projects that Respondent will be capable of servicing during the contract period.

- ii. Relevant Experience. Provide a narrative describing the Respondent's experience delivering this set of services. Include a description of Contractor's work on other projects or programs that demonstrate applicable experience.
- iii. Staffing. Provide resumes for staff that will be dedicated to the program, including intake personnel, home auditors, inspectors, construction managers, and program-specific administrative staff. Staff resumes should list certifications relevant to completing the listed services, certificates by the Building Performance Institute, or equivalent certifying agency for auditors and inspectors.
- iv. Financial. Respondent must submit audited financial reports for the two most recent fiscal years as an exhibit to the Response. If audited statements are not available, include the business's federal tax returns for the two most recent years.

b. Pricing

Respondent is invited to propose pricing for each scope of services it is submitting to provide. To the extent possible, provide pricing for individual services. Respondent may indicate per home costs for bundles of services where appropriate and this should be clearly explained in the Proposal.

If the Respondent would like to propose an alternative pricing structure, clearly explain the alternate structure and your reason for proposing it.

Please note that PEA must adhere to the federal procurement standards described in 2 CFR § 200.318-326. As such the final contract will contain a ceiling price that the Contractor exceeds at its own risk.

Scope 1: Intake Services

*Intake Services will be provided in accordance with the procedures outlined in Section 3 of the Built to Last Procedures Manual, **Appendix B**.*

Service	Unit Price
Complete BTL Application <i>Notes: Collect and verify all all documents required to determine program eligibility</i>	
Closure of partially complete application <i>Notes: Follow deferment protocols in manual</i>	
Optional: Support access to One Philly Front Door (OPFD) <i>Notes: As assigned by PEA, support select individuals who are on the BTL waitlist with enrolling for broader services using the OPFD portal.</i>	
Optional: BTL Eligibility Enrollment from Team Member Program <i>Notes: For BTL Team Member agencies only. This is the cost of additional intake</i>	

activities needed to enroll a Team Member Program Participant in the BTL Program.	
Optional: Other Add/Alternative services	

Scope 2. Home Assessment and Project Development

*Home Assessment and Project Development Services will be provided in accordance with the procedures outlined in Section 4 of the Built to Last Procedures Manual, **Appendix B**.*

Service	Unit Price
Conduct Whole-Home Assessment, provide assessment report, and Retrofit Work recommendations, including an initial PGCC Scope of Work.	
Optional: Other Add/Alternative services Notes: For example: Sewer scoping, structural assessments, etc.	

Scope 3. Construction Management

*Intake Services will be provided in accordance with the procedures outlined in Section 6-13 of the Built to Last Procedures Manual, **Appendix B**.*

Service	Unit Price
Finalize PGCC Scope of Work, assign to PGCC GC, oversee work, provide progress and final inspections, manage project documents and paperwork, submit pay requests, coordinate warranty work.	
Optional: Other Add/Alternative services	

c. Local and Diverse Hiring Plan:

Though not required, Respondent is invited to explain your strategy for creating a robust, diverse, local green home repair workforce, which could include the Respondent's ability to commit to actions such as, but not limited to, the following:

- i. Recruiting candidates for new positions who reside in the City of Philadelphia, who identify as minority, women, disabled, returning citizens, veterans, and/or who have completed Philadelphia-based training programs.
- ii. Supporting Philadelphia-based training programs by, for example, hosting trainees as interns, and providing guest speakers for classes and field trips. Please describe any previous experience considering applicants from workforce development initiatives.

d. Warranties

Respond to the following questions.

- i. Is the business or its management involved in any pending lawsuits, regulatory proceedings or other legal actions involving the business? (Yes or no. If yes, explain.)
- ii. Have you or any officer of your company been involved in bankruptcy or insolvency proceedings? (Yes or no. If yes, explain.)
- iii. Is the business a Minority/Woman/Disadvantaged/Local Business Enterprise certified? If so, provide details on the certifying entity.

e. Insurance

Submit a copy of the Respondent's liability insurance and worker's compensation insurance policies.

4. Public Disclosure and Confidential Information

All Responses, Exhibits, and other information submitted in response to this RFP are subject to the public disclosure requirements of applicable law, including the Pennsylvania Right to Know Law. To the extent permitted by applicable law, PEA will use its best efforts to keep from public access the specific information that is identified by the Contractor as confidential. If a Contractor claims an exception to public disclosure requirements and desires that PEA keep certain information from public disclosure, then the Contractor must include a notice in the Proposal as follows:

"Confidential Information Notice Pages _____ of this Proposal, identified by a bold vertical line along the right-hand margin, contain information that is excluded from public disclosure under applicable law. Contractor requests that such marked information be utilized by PEA only for evaluation of this Proposal, but Contractor understands that PEA is bound by applicable law and that such information may be disclosed in accordance with such law. "

Notwithstanding any such notice, however, PEA may disclose such marked information to individuals participating in the review or evaluation of Proposals, including members of the Selection Committee, other PEA employees, and advisors, attorneys, and consultants.

5. Evaluation Criteria

Proposals in response to this RFP will be evaluated by the PEA Selection Committee. PEA may invite finalists to make a brief oral presentation and be interviewed by the Selection Committee.

Selection criteria include:

- **Overall Quality:** Proposal's consideration of and responsiveness to the criteria set out in this RFP.
- **Experience:** Degree of Contractor's experience and proficiency in the scope of work, including demonstrated experience in the region.
- **Value and Price:** The set of services being proposed, and the value offered by the pricing of those services.
- **Implementation Capacity:** Ability to provide timely, quality intake services, site visits, audits,

design of scope of work, and other related services. Selected Contractors must be able to demonstrate sufficient staff capacity to successfully carry out this role.

- **Adequate Financial Capacity:** Selected Contractors must be able to demonstrate sufficient financial strength to successfully carry out this program.
- **Licensing and Insurance:** Contractors must be licensed in Pennsylvania to do the contracted work and must carry adequate insurance coverage, as detailed in the Contract for Services Between Contractor and the Philadelphia Energy Authority attached.
- **Potential for Growth:** The Respondents will be evaluated on their potential to have a lasting job creation impact, in line with the goals of the Philadelphia Energy Campaign.
- **Local and Diverse Hiring Plan:** Quality of and ability to commit to a clear plan to promote hiring local and diverse workers.
- **Language Accessibility.** The Respondents will be evaluated on their ability to provide language assistance services to persons of limited English proficiency and to persons with disabilities that impact their ability to hear, see, or to speak.

The Retrofit Management Agreement is included here as **Appendix A**. By responding to this RFP, Respondent agrees to the terms of the Agreement, except as specifically provided in Section 3.3.

6. PEA's Additional Procurement Rights

PEA reserves the right to modify this selection process, which may be exercised in its sole discretion at any time during the procurement process to:

- Cancel this RFP or the procurement process, with or without the substitution of another pre-qualification or procurement process;
- Waive any informality, defect, non-responsiveness, or deviation in a Proposal, or other submission, that is not material;
- Require one or more Contractors to supplement or clarify the Proposal or to provide additional information after the submission of Proposals including with respect to any exceptions to PEA's Contract Terms and Conditions;
- Take any action affecting the RFP process that would be in the best interests of the PEA or City;
- Conduct investigations and make inquiries concerning any aspect of any Proposal;
- Reject any or all Proposals;
- Reject a Contractor that has been delinquent or unfaithful in the performance of any contract with or obligation to the PEA or City is financially or technically incapable, or is otherwise not responsible; and/or
- Make judgments about the contents of any Proposal with respect to the requirements and criteria set forth in this RFP.

7. Costs

Any and all costs incurred by the Contractor, or other party in connection with this RFP or other aspect of the procurement process shall be at such party's expense and risk. The procurement team accepts no liability and will not be responsible under any circumstance for any cost or expense incurred to respond to this RFP or otherwise participate in the procurement process.

Appendix A: Retrofit Management Agreement

Appendix B: Built to Last Procedures Manual