



**EFFICIENCY MAINE TRUST  
REQUEST FOR PROPOSALS (RFP) FOR  
ONBOARD EV CHARGING MANAGEMENT**

**RFP EM-006-2022**

**Date Issued: November 4, 2021**

**Proposals Due: December 3, 2021  
3:00 p.m. Eastern Time (US)**

## Table of Contents

|   |           |
|---|-----------|
| <b>SECTION 1 – RFP INFORMATION AND INSTRUCTIONS .....</b>                             | <b>3</b>  |
| 1.1 PURPOSE .....   | 3         |
| 1.2 DESIGNATED CONTACT PERSON FOR THIS RFP .....                                      | 3         |
| 1.3 SCHEDULE .....  | 3         |
| 1.4 ANTICIPATED CONTRACT TERM .....   | 3         |
| 1.5 ANTICIPATED CONTRACT BUDGET .....   | 3         |
| 1.6 PROPOSAL SUBMITTAL DEADLINE .....   | 4         |
| 1.7 SUBMITTING QUESTIONS .....  | 4         |
| 1.8 PROPOSAL CONFIDENTIALITY .....  | 4         |
| 1.9 CONTRACT AWARD .....  | 4         |
| 1.10 CONTRACTING PROCESS .....  | 4         |
| 1.11 RFP PROCESS – RESERVATION OF RIGHTS .....  | 4         |
| 1.12 CONTRACT AGREEMENT .....   | 4         |
| 1.13 REQUEST FOR RECONSIDERATION .....  | 5         |
| <b>SECTION 2 – BACKGROUND INFORMATION .....</b>                                       | <b>6</b>  |
| 2.1 EFFICIENCY MAINE TRUST .....  | 6         |
| 2.2 BACKGROUND AND CONTEXT .....  | 6         |
| 2.3 PROGRAM OVERVIEW, OBJECTIVES, DESIGN AND REQUIREMENTS IN THE TRIENNIAL PLAN ..... | 6         |
| 2.4 ADDITIONAL SOURCES OF INFORMATION .....   | 7         |
| <b>SECTION 3 – SCOPE OF WORK .....</b>  | <b>8</b>  |
| 3.1 OVERVIEW .....  | 8         |
| 3.2 PRIMARY TASKS .....   | 8         |
| 3.3 PROPOSAL TASK DESCRIPTIONS .....  | 9         |
| 3.4 PROJECT DELIVERABLES .....  | 10        |
| <b>SECTION 4 – PROPOSAL REQUIREMENTS .....</b>  | <b>12</b> |
| 4.1 PROPOSAL PACKAGING AND PHYSICAL CONTENTS .....                                    | 12        |
| 4.2 FORMAT REQUIREMENTS .....   | 12        |
| 4.3 CONTENT AND ORGANIZATION REQUIREMENTS .....                                       | 12        |
| <b>SECTION 5 – PROPOSAL EVALUATION CRITERIA .....</b>                                 | <b>15</b> |
| 5.1 EVALUATION CRITERIA .....   | 15        |

**Separate attachments:**

Attachment A – Proposal Cover Sheet Form

Attachment B – Standard Agreement

Attachment C – Project Proposal Cost Form

Attachment D – CIMS Appendix B

## SECTION 1 – RFP INFORMATION AND INSTRUCTIONS

### 1.1 Purpose

Through this RFP, the Efficiency Maine Trust (the Trust) seeks one qualified bidder or bid team to support the Trust in its goal of managing electric vehicle (EV) charging through software-based interventions, default charging schedules and performance-based incentives, to shift charging behavior to off-peak hours and maximize low carbon generation.

### 1.2 Designated Contact Person for this RFP

Jack Riordan  
 Strategic Initiatives Manager  
 Efficiency Maine Trust  
 168 Capitol Street, Suite 1  
 Augusta, ME 04330-6856  
 Phone: (207) 213-4147  
 Email: jack.riordan@efficiencymaine.com

### 1.3 Schedule

|   | Milestone                                      | Date/Deadline                                       |
|---|--|---|
| 1 | RFP Issued                                     | November 4, 2021                                    |
| 2 | Questions Due                                  | November 10, 2021                                   |
| 3 | Responses to Questions Posted                  | November 12, 2021                                   |
| 4 | Proposals Due at Efficiency Maine Trust Office | <b>December 3, 2021 3:00 p.m. Eastern Time (US)</b> |
| 5 | Anticipated Award Date                         | December 10, 2021                                   |
| 6 | Anticipated Contractor Start                   | December 17, 2021                                   |
| 7 | Program or Project Launch                      | January 1, 2022                                     |

Schedule changes: The Trust reserves the right to modify this schedule at its discretion. Any changes or additional information regarding the RFP schedule and pre-bid activities, including responses to questions, will be posted on the Trust's website at: <http://www.efficiencymaine.com/opportunities>

### 1.4 Anticipated Contract Term

The anticipated term of the contract is January 1, 2022, through June 30, 2022, with three possible one-year extensions.

### 1.5 Anticipated Contract Budget

The total budget for the award to be made under this solicitation is \$80,000 and may be allocated towards a single award. The individual contract will be compensated on a fixed-price or time and materials not-to-exceed basis.

### 1.6 Proposal Submittal Deadline

Proposals must be received at the Trust's office by the due date and time specified in section 1.3. Any proposal received after the deadline will not be considered. Proposals must be complete when submitted; changes or additions will not be accepted after the specified due date and time, except for any clarifications requested of bidders by the Trust.

### 1.7 Submitting Questions

It is the responsibility of all Bidders and other interested parties to examine the entire RFP and to seek clarification, in writing, if they do not understand any information or instructions. Questions regarding this RFP must be submitted by email to the Designated Contact Person listed in section 1.2 prior to the due date above. The subject line of the email should be: "Request for Proposals (RFP) for Onboard EV Charging Management". Responses to questions will be posted on <http://www.energymaine.com/opportunities>. All clarifications and amendments released regarding the RFP will be posted on <http://www.energymaine.com/opportunities>. It is the responsibility of all interested parties to check this website periodically to obtain clarifications and amendments. Only those clarifications and amendments posted on this website are considered binding.

### 1.8 Proposal Confidentiality

Bidders should be aware that information provided to the Trust is subject to the Maine Freedom of Access Act (FOAA), 1 M.R.S. §§ 401 et seq., unless there is a specific confidentiality exemption in the Efficiency Maine Trust Act, 35-A M.R.S. §10106. Bidders should assume that all information submitted in response to this RFP will be considered public records available for public inspection pursuant to the Maine FOAA following announcement of an award decision.

### 1.9 Contract Award

The Trust will notify all bidders of the contract award decision by email. The Trust reserves the right to negotiate the final terms and conditions of the contract award with a winning bidder whose proposal is selected by the Trust, and to reject any winning bidder with whom the Trust cannot agree to terms and conditions meeting the Trust's needs, in the Trust's sole judgment. The Trust reserves the right to reject any proposal that does not meet these requirements.

### 1.10 Contracting Process

The selection process is governed by the Efficiency Maine Trust Rule Chapter 1: Contracting Process for Service Providers and Grant Recipients, which can be found on the Trust's website: <http://www.energymaine.com/docs/Chapter-1-Contracting-Process-for-Service-Providers-and-Grant-Recipients.pdf>.

### 1.11 RFP Process – Reservation of Rights

The Trust reserves the right to cancel or extend the RFP process at any time, and to issue clarifications and amendments to the RFP/Q. The Trust also reserves the right to reject noncompliant submissions in response to this RFP. The Trust, in its sole discretion, reserves the right to recognize and waive minor informalities and irregularities found in proposals received in response to this RFP/Q.

Issuance of this RFP does not commit the Trust to make an award or to pay any costs or expenses incurred by a bidder in connection with preparation of a proposal or response to this RFP.

### 1.12 Contract Agreement

A copy of the Efficiency Maine Trust Standard Agreement appropriate to this RFP is provided as **Attachment B – Standard Agreement**. This is the standard document that will complete the agreement for

services between the winning bidder and the Trust. Information regarding a customer that has participated or that may participate in a Trust program is deemed confidential by the Efficiency Maine Trust Act. The winning bidder and its agents and subcontractors will be required to execute a nondisclosure agreement. See <http://legislature.maine.gov/statutes/35-A/title35-Asec10106.html> for additional information on related confidentiality restrictions.

### **1.13 Request for Reconsideration**

An aggrieved person may request a hearing for reconsideration of a contract award decision by filing a written petition with the Executive Director of the Trust within 14 calendar days of the notification of the contract award. Each petition to reconsider must meet the requirements specified in Efficiency Maine Trust Rule Chapter 1, Contracting Process for Service Providers and Grant Recipients, Section 5(B), which can be found on the Trust's website under Documents and Services:

<http://www.efficiencymaine.com/docs/Chapter-1-Contracting-Process-for-Service-Providers-and-Grant-Recipients.pdf>

## SECTION 2 – BACKGROUND INFORMATION

### 2.1 Efficiency Maine Trust

The Trust is the independent administrator for programs to improve the efficiency of energy use and reduce greenhouse gases in Maine. The Trust does this primarily by delivering financial incentives on the purchase of high-efficiency equipment or changes to operations that help customers save electricity, natural gas, and other fuels throughout the Maine economy. The Trust is a quasi-state agency governed by a Board of Trustees with oversight from the Maine Public Utilities Commission.

### 2.2 Background and Context

The Trust's Innovation Program provides funding to support pilot projects that demonstrate new types of energy efficiency, conservation, or alternative energy measures or new strategies for promoting such measures. The program focuses on measures or strategies that show significant potential to be cost-effective and provide energy or greenhouse gas savings but that are not yet well understood or established in the marketplace. The measures piloted may or may not prove to be cost-effective or popular in the Maine marketplace. Part of the purpose of the Innovation Program is to use smaller pilot projects to generate findings of cost-effectiveness and market demand before making larger investments on incentives and program delivery.

### 2.3 Program Overview, Objectives, Design and Requirements in the Triennial Plan

In its Fourth Triennial Plan (TPIV), the Trust identified Distributed Energy Resources (DERs) and the “smart grid” as a significant area of opportunity for exploration through the Innovation Program. TPIV noted that periods of peak demand have led to concerns about prices, grid stability and grid reliability. Indeed, Maine's electric utilities are making significant investments in transmission and distribution infrastructure to meet grid reliability needs. The Trust is therefore interested in exploring cost-effective ways to help Maine consumers reduce the inefficient use of the grid by managing load to favorably impact peak demand.

The Trust is looking to develop strategies for managing the timing of residential Level 2 (L2) EV charging to capture more potential benefits of transportation electrification and potentially mitigate its costs. Electric vehicles are already more efficient and cleaner than internal combustion counterparts. If their charging can be shifted to a time of day with a higher penetration of renewables and lower cost energy, then those benefits will only increase. If uncontrolled charging adds to peak usage and requires potentially costly transmission and distribution upgrades, then those overall benefits could be lower.

The Trust is currently conducting a similar pilot focused on the role that hardware-based solutions (i.e., 40-amp networked L2 home chargers) could play in shifting charging load. The goal of the new pilot is to focus on “onboard” solutions to achieve the same outcome. These solutions could be solely software/ API-based or could utilize technology that is easily integrated into the vehicle itself (e.g., equipment that plugs into the vehicle's OBD port).

#### 2.4 Additional Sources of Information

Following are links to additional information that bidders may find helpful in preparing a response to this RFP:

| <b>TITLE</b>                                | <b>LOCATION (link)</b>  |
|---|---|
| Efficiency Maine Trust website              | <a href="http://www.energymaine.com">www.energymaine.com</a>  |
| Efficiency Maine Trust Annual Reports       | <a href="https://www.energymaine.com/about/library/reports/">https://www.energymaine.com/about/library/reports/</a>   |
| Efficiency Maine Trust – Triennial Plan     | <a href="https://www.energymaine.com/about/library/policies/">https://www.energymaine.com/about/library/policies/</a>   |
| Efficiency Maine EV Baseline Charging Study | <a href="https://www.energymaine.com/docs/CDA_Efficiency_Maine_EV_Baseline_Charging_Study.pdf">https://www.energymaine.com/docs/CDA_Efficiency_Maine_EV_Baseline_Charging_Study.pdf</a> |

## SECTION 3 – SCOPE OF WORK

Following is a task-by-task description of the work covered by this RFP. As explained in section 4.3, below, bid proposals must reflect the bidder's plan, approach, capacity for each task and describe related experience.

### 3.1 Overview

This pilot project will compare its findings with those generated through the [L2 Smart Charging Pilot](#) as well as the Trust's [Residential Level 2 Electric Vehicle Charging Baseline Study](#) to better understand the role that onboard charging management could play within its programs.

The Trust is also interested in how charging management can be scaled to a full program in the Triennial Plan V<sup>1</sup> period that starts on July 1, 2022. The successful bidder must measure the value of the onboard charging intervention against a pre-established baseline.

**Managed Charging Group:** The managed charging group will consist of at least 40 participants who will enroll in the onboard charging management services of the successful bidder. This group will have their charging controlled by the third party in an opt-out scenario, allowing the customer to clearly have the option to not participate in a managed charging scenario should their current situation not be conducive to it. For example: if an EV is plugged in while the owner is grocery shopping, they would opt out of the managed charging schedule.

**Control Group:** The Trust worked with Convergence Data Analytics to establish a statewide charging behavior baseline from usage data. The study aimed to understand the current charging behavior in Maine using the AMI data of a sample of registered EVs in the state. The full report can be found [here](#). The Trust will provide the successful bidder the raw data required to measure interventions against this baseline.

### 3.2 Primary Tasks

The primary purpose of this RFP is to procure the services of one or more qualified bidders to collaborate with onboard charging management service providers, the Trust's qualified partner network, and the Trust's Electric Vehicle and Innovation teams to further the Trust's understanding of effective charging management strategies.

The Trust seeks qualified bidders to partner with OEMs who **currently market** onboard charging management systems that meet the below criteria:

- a. Has an interface that readily allows third parties (in this case the Trust), installers, or customers/end users to easily program or participate in a predetermined off-peak charging schedule, as established by the Trust;
- b. Has the ability to communicate with a central aggregator database or dashboard (proprietary to OEM or third-party) that would allow a third party to manually set "allowable charging period time" parameters as needed and track charging behavior and energy usage in a format that can be provided to the Trust;
- c. Effectively communicate these changes to customers/end users and easily provide them with the opportunity to opt-out;
- d. Allow customers/end users the ability to easily override the predetermined off-peak charging schedule without the need for reprogramming the following day;

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<sup>1</sup> <https://www.energymaine.com/triennial-plan-v/>



- e. Track charging behavior and energy usage in a format that can be provided to the Trust.

The primary tasks that will be requested of the successful bidder are to:

- (1) Supply at least 40 subscriptions that meet the criteria outlined in [Section 3.1](#) at a reduced, incentivized cost, to pre-approved end customers;
- (2) Serve as a primary point of contact for customers interested in participating in the pilot project;
- (3) Ensure the networking functionality is properly working for all pilot participants and that the equipment is communicating with the central aggregator/database.

### 3.3 Proposal Task Descriptions

The bidder(s) are expected to propose how they will perform the following tasks:

#### **Task 1: Project Kickoff Meeting and Transition Plan**

The bidders(s), in consultation with the Trust, will organize and facilitate a Kickoff Meeting to establish a foundation for the pilot, review the proposed statement of work and schedule, consider any revisions or adjustments that may be necessary, and establish communication protocols.

**Task 1 Deliverables:** *Kickoff Meeting materials*

#### **Task 2: Customer Acquisition Plan**

The bidder(s) must develop a detailed Customer Acquisition plan that details the specific means through which the bidder will target, enroll, and manage customer's charging behavior. This plan should also specify marketing strategies, technologies that are to be leveraged in the process of customer acquisition, and explain the arrangements made with vehicle OEMs that predicate the use of their vehicle's API for managed charging (which manufacturers are supported, what services can be provided through the vehicle API, what arrangements exist between the bidder and the vehicle OEMs to guarantee continuous service to the end customer over the course of the pilot, etc.).

**Task 2 Deliverables:** *Customer acquisition plan, documentation detailing the bidder's compliance with vehicle OEM(s) API, description of bidder's data security measures, and signed MOU(s) with database or aggregator (if relevant)*

#### **Task 3: Measure Deployment Plan**

The bidder or bid team must develop a detailed Measure Deployment Plan that details the role that they will play in:

- (1) enrolling customers into the pilot project;
- (2) ensuring continued service to the end customer;
- (3) achieving the Trust's goals of shifting load; and
- (4) implementing a quality assurance plan for the enrollment of customers and the security of their personal identifiable information (PII).

**Task 3 Deliverables:** Customer Outreach/Acquisition and Measure Deployment Plan

#### **Task 4: Project Management and Reporting**

The bidder or bid team will manage all aspects of the pilot, including management of all tasks, oversight of any subcontractors, and submission of all deliverables. Management of the pilot must be designed to deliver high-quality, on-time, on-budget services to the Trust. As part of this ongoing task, the bidder will, at a minimum:

- Implement formal and informal communication strategies (e.g., status reports) throughout the contract period to maintain effective and timely communication with the Trust;
- Prepare interim memos documenting key findings as they are reached; and
- Prepare comprehensive draft and final reports on the pilot.

**Task 4 Deliverables:** *Monthly Project Status Reports; Draft and Final Pilot Reports; Draft and Final PowerPoint Presentation.*

#### **Task 5: Option to Extend**

The bidder or bid team will include an additional scope and budget that covers the costs of expanding the managed charging services for the full Triennial Plan V period through three annual contract renewals. In the proposed Triennial Plan V, the Trust estimated that it could enroll the following number of participants per fiscal year:

- FY2023: 773
- FY2024: 2,084
- FY2025: 4,199

Bidders should indicate cost savings that could be realized by expanding the pilot into a full program.

**Task 5 Deliverables:** *Task 1-4 deliverables scaled to meet the above criteria.*

### **3.4 Project Deliverables**

The bidder or bid team will be responsible for timely completion of all requirements specified in the Scope of Work. Specific deliverables to be completed by the bidders(s) will include, but are not limited to, the following:

1. Interim reports to the Trust in the form of conference calls, emails, and/or memos.
2. Draft and final Pilot Implementation Plan that outlines the approach used by bidders(s) to implement their proposal.
3. All customer-facing instruments, documents, or protocols to ensure they meet the Trust's standards.
4. Monthly Project Status Reports
5. Original data files and final, cleaned project data and analysis files resulting from the pilot, as needed.
6. Draft and final report summarizing the results of the pilot.

7. Draft and final presentation summarizing the results of the pilot to the Efficiency Maine Board of Trustees.

The bidder must commit to completing all tasks within the time frame established in the approved Pilot Implementation Plan. The bidder must provide Efficiency Maine with electronic copies of all deliverables in Microsoft Office software format or other appropriate format approved by Efficiency Maine.

## SECTION 4 – PROPOSAL REQUIREMENTS

### 4.1 Proposal Packaging and Physical Contents

Proposals must be delivered to the Trust as an electronic file or in an envelope or package clearly labeled, "Request for Proposals (RFP) for Onboard EV Charging Management". All proposals must adhere to the instructions and format requirements outlined in this RFP and the written supplements and amendments issued by the Trust.

The proposal submission must include:

- One electronic copy of the complete proposal. Files must be provided in Microsoft Word and/or PDF format and a copy of Attachment C must be provided in Microsoft Excel format.

Please attach all documents required by the RFP including, but not limited to, the proposal, and Attachments A and C. Please include the bidder or bidder team names in name of the document, as well as a clear label. For example, "Bidder\_ABC\_Proposal"

### 4.2 Format Requirements

Proposals will be evaluated for adherence to the following format requirements:

- Proposals must be typewritten.
- Pages must be numbered.
- Unnecessary attachments (e.g., any attachments beyond those sufficient to present a complete, comprehensive, and effective proposal) will not be considered in the evaluation of the proposal.
- Proposals must adhere to prescribed page limits specified in this RFP. The Trust values concise proposals.

### 4.3 Content and Organization Requirements

The proposal must include the following contents, which should be presented in the following order:

#### 1. Proposal Cover Sheet Form

- Include a completed, signed Proposal Cover Sheet Form, which is provided in Attachment A of the Request for Proposals.
- Proposals that include teaming arrangements must designate one party as the lead bidder.

#### 2. Table of Contents

#### 3. Letter of Transmittal (1 page)

Include a brief Letter of Transmittal, on company letterhead, signed by an appropriate officer of the lead bidder who can bind the company to a contract.

#### 4. Letters of Commitment (1 page each)

If the proposal involves any subcontractors, include a letter of commitment from each subcontractor, signed by an appropriate officer of the subcontractor who can bind the company to a contract. Include a statement certifying that the provision of services to the Trust will not result in a conflict of interest.

## 5. Introduction (2 pages maximum)

Summarize understanding of the services requested in the RFP and proposed approach to fulfilling the requirements of this RFP. Briefly describe the proposed project team and qualifications.

## 6. Statement of Work (8 pages maximum)

- **Overview:** Provide an overview of the proposed approach. Describe how the project will be implemented to fulfill the objectives of the pilot, as specified by the Trust, and the requirements of the Scope of Work (Section 3).
- **Task-by-Task Program Implementation Plan:** Specify the proposed Program Implementation Plan for accomplishing each individual task specified in the Scope of Work. Each task-specific plan should outline the approach to the task and specify the relevant methods and deliverables.
- **Technical overview of equipment:** Describe the technical capabilities of the onboard charging management platform to perform the requirements described in section 3.2.
- **Schedule and Deliverables:** Provide a chart or outline detailing the proposed schedule for the pilot, including proposed timelines for each task and a

## 7. Qualifications, Staffing and Management (5 pages maximum)

### a. Corporate Qualifications

Describe the bidding team's qualifications, including brief descriptions of experience on contracts of similar scope and size. For each, provide the client's name, the results achieved, and how the work is relevant to the current RFP.

### b. Individual Qualifications

For each staff member that is bid on the project, please provide a brief narrative that includes a description of the individual's role on this project and a summary of his or her relevant education, training, experience, and expertise. Include resumes in Appendix B.

### c. Organizational Chart

Provide an organizational chart of the proposed team for the program. The chart should identify key team members where identified, their roles, and relationships between staff and organizations (the Trust, the contractor, and any subcontractors). Clearly indicate the day-to-day primary point of contact for the Trust as well as the lead executive contact.

### d. Financial capability

Disclose and provide details regarding any bankruptcy petition (whether voluntary or involuntary), receivership, insolvency event, or similar adverse financial circumstance suffered or incurred by bidder (or any predecessor entity) within the three years preceding the date of submission of this proposal. Disclose and provide details regarding any litigation, arbitration, or administrative proceedings involving bidder within the three years preceding the date of submission of this proposal in which the amount claimed or adjudged against bidder exceeded \$50,000.

## 8. Cost Proposal (use Project Cost Form - Attachment C, provided)

**Cost Information:** Provide either a fixed-price or time and materials not-to-exceed bid for

delivering the pilot. The bid should reflect an understanding that under the resulting contract agreement the winning bidder will be bound by the labor rates and not-to-exceed level specified in the contract and will be required to complete all tasks specific in that agreement without charges above the total agreement price.

**Narrative:** Provide a brief narrative explanation of the project cost proposal, including the total price, price for each task, and any relevant assumptions.

**Cost Form:** Provide a completed Project Proposal Cost Form (Attachment C) detailing the breakout of costs, including labor hours, hourly rates, and costs for all personnel, including any subcontractors; other direct costs; and total costs in sufficient detail to allow assessment of the reasonableness of the basis for the not-to-exceed level proposed. All related expenses must be included and itemized on this form; any costs not included on this form will be disallowed. A hard copy of this form must be included in all copies provided but will not be counted against the page count requirements.

## 9. Appendices

### a. Appendix A - References

Provide a list of references for the lead bidder and any subcontractors included in the bid. At least three references must be provided for each organization included in the bid. For each reference, please provide current contact information (name, company, telephone number, and email address) and a brief description of the work conducted for the reference and its relevance to the current RFP. If evaluations of bidder's programs are available, please provide a list of them that includes the report title, author/independent evaluator, publication date, and URL (or filename if provided electronically) for accessing the report.

### b. Appendix B - Resumes

Provide resumes of key project team members. Key project team members identified in the proposal must be dedicated to the proposed project in the role proposed. Any substitutions of key project team members must be approved by the Trust.

### c. Appendix C – Samples

Please provide at least three samples of recent work pertinent to the expertise for which the bidder is submitting qualifications and rates.

## SECTION 5 – PROPOSAL EVALUATION CRITERIA

Proposals that meet the requirements established in the RFP will be evaluated by a proposal review team. The Trust reserves the right to decide whether a proposal is acceptable in terms of meeting the requirements of this RFP and to accept or reject any or all proposals received.

In evaluating proposals, the Trust reserves the right to take any of the following steps, with respect to either all of the proposals received or to a subset of proposals selected as superior to the others: (1) consult with prior clients on the performance of the bidder or of particular persons proposed for this bid; (2) schedule presentations or interviews with representatives of the bidder or persons proposed for the project; (3) conduct a review of past performance, including a review of reports, analyses, or other materials that would reflect the bidder's performance; and, (4) request additional data or supporting material.

### 5.1 Evaluation Criteria

In evaluating proposals submitted in response to this RFP, the proposal review team will use the following criteria:

| Scoring Category  | Maximum Points |
|---|----------------|
| <b>1. Statement of Work</b> <ul style="list-style-type: none"> <li>a. Does the Statement of Work present a comprehensive, sound approach for accomplishing the requirements of this RFP?</li> <li>b. Is the Statement of Work thorough, specific, and responsive to the requirements and details specified in the RFP?</li> <li>c. Does the proposal demonstrate a clear understanding of the Statement of Work and the Trust's expectations?</li> <li>d. Does the Statement of Work reflect best practices in delivering the specific programs described in this RFP?</li> </ul> | 35             |
| <b>2. Staff and Organization Qualifications</b> <ul style="list-style-type: none"> <li>a. Is the proposed project staffing plan clear, well-defined, appropriate, and realistic for the scope of the services requested?</li> <li>b. How qualified are the proposed personnel in terms of skills, expertise, and experience relevant to this program?</li> <li>c. How qualified are the proposed organizations (lead bidder and subcontractors) in terms of demonstrated experience and capacity to execute this type of program?</li> </ul>                                      | 25             |
| <b>3. Project Cost/Budget</b> <ul style="list-style-type: none"> <li>a. Are appropriate resources being devoted?</li> <li>b. How does the total bid cost compare to other comparable proposals?</li> <li>c. Is the proposed budget consistent with the requested Statement of Work?</li> <li>d. How do the quoted rates compare to other comparable proposals?</li> </ul>   | 25             |
| <b>4. Overall Quality and Responsiveness</b> <ul style="list-style-type: none"> <li>a. What is the overall quality of the proposal submission, including: completeness, clarity, attention to detail, adherence to instructions and lack of errors?</li> <li>b. Does the proposal reflect and respond to the Trust's priorities?</li> </ul>   | 15             |
| <b>Total</b>  | <b>100</b>     |

### 1. Statement of Work

- Does the Statement of Work present a comprehensive, sound approach for accomplishing the requirements of this RFP?
- Is the Statement of Work thorough, specific, and responsive to the requirements and details specified in the RFP?
- Does the proposal demonstrate a clear understanding of the pilot and the Trust's expectations for the Innovation program?
- Does the Statement of Work reflect best practices in program delivery?
- If the proposed pilot is successfully implemented, to what degree will the technology, application or configurations used in the pilot have the potential to deliver future quantifiable, cost-effective, load management and reduced costs for the utility customers and/or the grid in Maine?

## **2. Staffing, Management and Qualifications**

- Is the proposed pilot staffing plan clear, well-defined, and appropriate to the substance and scope of the services requested by the Trust?
- How qualified are the proposed personnel in terms of skills, expertise, and experience relevant to this pilot?
- How qualified are the proposed organizations (lead bidder and subcontractors) in terms of demonstrated experience and capacity to execute this type of pilot?

## **3. Project Budget/Cost**

- Are appropriate resources being devoted to the individual tasks and sub-tasks?
- How does the total bid compare to other comparable proposals?
- Is the proposed budget consistent with the proposed Statement of Work?
- To what degree do the budget details reflect cost conservation and the likelihood to successfully complete the project as proposed?
- Where appropriate/relevant, does the proposal reflect a reasonable incentive structure to encourage participation in the pilot?

## **4. Overall Quality and Responsiveness**

- What is the overall quality of the proposal submission, including but not limited to: completeness, clarity, attention to detail, adherence to instructions and requirements and lack of errors?
- Does the proposal reflect and respond to the specific attributes of the pilot and the Trust's priorities for the Innovation program?