



**EFFICIENCY MAINE TRUST
REQUEST FOR PROPOSALS (RFP) FOR
DEMAND MANAGEMENT PROGRAM SUPPORT**

RFP EM-008-2025

Date Issued: October 3, 2024

Updated: 10.24.24

**Proposals Due: November 14, 2024, 11:59 p.m. Eastern Time
(US)**

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Separate attachments:

Attachment A – Project Cost Proposal Form

Attachment B – Standard Agreement

Attachment C – Team Commitment Form

Attachment D – Confidentiality, Non-Disclosure and Protective Agreement

SECTION 1 – RFP INFORMATION AND INSTRUCTIONS

1.1 Purpose

The Efficiency Maine Trust (the Trust) seeks a qualified contractor or team of contractors to support the Trust's Demand Management Program.

1.2 Designated Contact Person for this RFP

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1.3 Schedule

	Milestone	Date/Deadline
1	RFP Issued	10/3/2024
2	Questions Due	10/17/2024
3	Responses to Questions Posted	10/24/2024
4	Proposals Due	11/14/2024, 11:59 p.m. Eastern Time (US)
5	Anticipated Award Date	11/26/2024
6	Anticipated Contractor Start	12/10/2024

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 RFP EM-008-2025 webpage at <https://www.efficiencymaine.com/opportunities/rfp-em-008-2025/>.

1.4 Anticipated Contract Term

The Trust anticipates awarding one contract to a single bidder or team of bidders to cover a period of performance from December 10, 2024, through June 30, 2028.

1.5 Anticipated Contract Budget

The anticipated budget for this program is outlined in the Trust's proposed Triennial Plan VI (Fiscal Years 2026 –2028). The budgets are currently estimated at \$1,586,201 for FY2025, \$3,774,048 for FY2026, \$6,286,490 for FY2027, and \$9,771,052 for FY2028. The Trust's fiscal year runs from July 1 to June 30.

The proposed budgets for this initiative should cover all costs of the operation under the awarded contract, including administration, measure incentives, and marketing. Note that a portion of the authorized budgets may support program-related activities conducted by Trust staff or separate contractors. Note that incentives typically account for approximately 80% of a Trust program budget. As a placeholder budget in the proposed Triennial Plan, Trust staff indicated that Demand Management program delivery would not exceed \$750,000 annually during the Triennial Plan period.

The Trust will refine its estimate of the program delivery budget after reviewing submitted bids. Bidders are encouraged to propose the most cost-effective approach that meet the requirements laid out below. The resulting contract will be structured on a Time and Materials basis with a Not-To-Exceed maximum budget

More details on the proposed Triennial Plan VI budgets may be found here:

<https://www.energymaine.com/triennial-plan-vi/>. The actual budget each year will be updated pursuant to approvals by the Trust's Board of Trustees and orders by the Maine Public Utilities Commission related to the Trust's Triennial Plan.

1.6 Proposal Submittal Deadline

All proposals must be submitted electronically via the online Submission Form on the RFP EM-008-2025 webpage (<https://www.energymaine.com/opportunities/rfp-em-008-2025/>). Proposals must be received by the due date and time specified in section 1.3. Bidders will receive a time-stamped confirmation email when their proposals are submitted. (Note: There may be a delay of a few minutes between submission and this confirmation email). 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. The Trust encourages bidders to submit their proposals with sufficient time to account for any technological challenges (e.g., Internet disruptions).

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 for questions noted above in section 1.3. The subject line of the email should be: "Demand Management Program Support". Responses to questions will be posted on <http://www.energymaine.com/opportunities/rfp-em-008-2025>, as will all clarifications and amendments released in regard to the RFP. 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

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.efficiencymaine.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. 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. Issuance of this RFP does not commit the Trust to make an award. The Trust will not 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. The winning bidder and its agents and subcontractors will be required to execute a nondisclosure agreement, see **Attachment D -- Confidentiality, Non-Disclosure and Protective Agreement**. Certain information regarding a customer that has participated or that may participate in a Trust program is deemed confidential by the Efficiency Maine Trust Act. 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 Efficiency Maine Trust (the Trust) is the independent, quasi-state agency established to plan and implement energy efficiency programs in Maine. Through its suite of nationally recognized programs, the Trust provides consumer information, marketing support, demonstration pilots, discounts, rebates, loans, and other initiatives to promote high-efficiency equipment and operations that help Maine’s homes, businesses, and institutions reduce their energy costs and lower their greenhouse gas emissions. The result is job growth, better grid reliability, improved energy independence, a stronger local economy, and critical progress toward meeting the State’s climate change goals. The Trust is governed by a Board of Trustees with oversight from the Maine Public Utilities Commission.

2.2 Background and Context

The Demand Management Program is a relatively new program in the Trust’s portfolio. It was first launched in January 2022, with the Demand Management Program’s Demand Response Initiative. Since that time the Demand Management Program has grown to also include a load shifting initiative, with additional offerings envisioned for the next Triennial Plan period (FY2026-FY2028).

Trust Staff has managed the Demand Management Program internally for several years but the growing program now requires additional support from a program delivery team.

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

The Demand Management Program seeks to increase the efficiency of energy use in Maine by deploying measures and strategies that mitigate the impacts of demand on electricity utility transmission and distributions systems and balance the increased penetration of intermittent renewables on the grid. In Triennial Plan VI, this program will start with three discrete initiatives:

- *Demand Response Initiative*: A traditional demand response program where participants are compensated for reducing their electricity usage when called upon to do so. This typically occurs during periods of peak demand that drive system costs.
- *Distributed Energy Resource (DER) Initiative*¹: An initiative focused on using both passive and active load-shifting strategies across fleets of devices. These devices and deployment strategies are programmable and, in some cases, networked, operating in response to internal or remote dispatch signals. The initiative incentivizes participants to modify the timing of their electricity consumption from the grid -- shifting away from periods of peak demand to periods of lower demand -- which reduces overall system costs for all ratepayers.
- *Large Battery Initiative*: An initiative involving performance-based incentives for the installation and dispatch of batteries at demand-metered customers during summer peak demand conditions.

For more information on the Demand Management Program, please see the draft Triennial Plan here: <https://www.energymaine.com/triennial-plan-vi/>, including *Appendix O: Demand Management Program Analysis and Considerations*.

¹ In Triennial Plan V, this initiative was called the “Load Shifting Initiative”. It has been renamed to acknowledge that there are multiple strategies for capturing ratepayer value from fleets of different devices.

2.4 Additional Sources of Information

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.

Task 1: Project Kickoff Meeting

The winning bidder will describe its approach, deliverables, and schedule for a project kickoff meeting. The winning bidder must develop a plan that outlines all major tasks associated with delivering the Demand Management Program. The plan must outline all major tasks associated with program delivery. Describe the tasks, who will take the lead on each, and the start and end date for each. Include activities such as establishing an in-state office (if proposed); hiring/training personnel; updating all program materials (such as program manuals, forms, web pages/tools, agreement templates, printed materials, and marketing materials).

Task 2: Program Design Review

The current program uses the following approaches:

Demand Response Initiative (~32MW of curtailable load per year):

- Capacity contracts with pre-approved Curtailment Service Providers (CSPs)
- Third party evaluation of ISO-NE system peaks and individual participant curtailment performance
- Direct incentive payments, made by Efficiency Maine, to CSPs

Open Access Initiative (~220 per year):

- Forecasting, customer management, demand response dispatch, and incentive processing through the Efficiency Maine Distributed Energy Resource Management System (DERMS) platform, Virtual Peaker.
- Enrollment of existing home battery systems, networked Level 2 (L2) chargers, and onboard vehicle charging management through original equipment manufacturer (OEM) specific apps (i.e. Tesla mobile app)
- Enrollment of existing home battery systems, networked L2 chargers, and onboard vehicle charging management through white labeled enrollment portal hosted on the Efficiency Maine website (Virtual Peaker)

In addition to the initiatives outlined above, the program anticipates using the following, additional program offerings in Triennial Plan VI (July 1, 2025 – June 30, 2028)²:

Renewable Reliability Initiative (~1,000 per year):

- Coordinating with third-party owners (TPOs) to install, commission, and operate a fleet of home

² <https://www.energymaine.com/triennial-plan-vi/>

battery backup systems, paired with solar under a multi-year, fixed \$/kW performance incentive. The program is articulated as a “reliability-as-a-service” model, with customer payments and performance incentives issued directly to TPOs. Dispatches will target ISO-NE and Regional Network Service (RNS) peaks and will be managed by the TPO with which a customer is enrolled.

Smart Charger initiative (~4,500 per year):

- Coordinating with OEMs that will serve as the primary fulfillment and program partner for a L2 Smart Charger equipment incentive program. These vendors must establish a white-labeled, online storefront to apply instant rebates and volumetric discounts directly to customer’s purchases. The Trust will pay incentives directly to customers upon commissioning of their devices. These chargers will be passively dispatched, moving charging outside of peak windows using pre-determined schedules.

The winning bidder will periodically review the existing program design including all internal and customer-facing material, and recommend any changes for Efficiency Maine’s consideration.

Describe your experience delivering programs using each of the approaches above.

Task 3: Efficiency Maine Call Center Coordination

All customer calls come in through Efficiency Maine’s central Call Center. Calls are forwarded to the appropriate program team (e.g., the Demand Management Program). The winning bidder will be required to work cooperatively with the Trust’s central call center and assist with call center training, monitoring, and support to ensure maximum customer satisfaction and cost-effective program delivery.

Task 4: Trade Ally Management

The Trust works with trade allies across its programs. The winning bidder will be asked to support trade allies working in the Demand Management program, and coordinate with Trust staff and other delivery teams in so far as these trade allies may also work with other programs. This might include answering contractor questions, tracking contractor certifications and other paperwork, managing trade ally listings on the Trust website, and more.

Task 5: Customer Service

The winning bidder must handle all calls forwarded from Efficiency Maine’s call center Monday through Friday, 8:00 a.m. to 5:00 p.m., except State holidays. At its peak, this program receives 10 to 30 calls per day, and we expect at least 90% of calls to be answered within 20 seconds. The Trust anticipates this number will increase with its new Renewable Reliability and Smart Charging offerings for Triennial Plan VI.

Task 6: Inspections and Best Practices

The winning bidder must provide, as needed, a team of field representatives (reps) who inspect up to 25% of Renewable Reliability and Smart Charging installations virtually or in person to ensure that measures are installed as per the program guidelines, help participants to get the most out of their upgrades, and measure customer satisfaction. They also collect best practices for all relevant program measures to share amongst all installers and perform other tasks as requested.

Task 7: Updates to Efficiency Maine’s Energy Savings Tracking Database (“effRT”) and DERMS Platform (Virtual Peaker)

The winning bidder must upload to Efficiency Maine’s existing tracking database, called “effRT,” all data required to claim savings and facilitate program evaluation. Information may include product details, product features, product price, installation location, incentive, rebate claim date, intended use, etc. This information must be uploaded as rebates are paid.

The winning bidder must also assist Efficiency Maine staff in the management of the Trust’s distributed energy resource management system (DERMS) platform, Virtual Peaker. This platform serves as a centralization device management, system forecasting, incentive processing, and customer relation management system. The winning bidder will be expected, at a minimum, to aid staff in enrolling customers, verifying their enrollment information, and managing their experience (e.g., monitoring the portfolio of enrolled customers for connection issues and working to re-enroll their devices).

Task 8: Program Marketing

The winning bidder will be responsible for all program marketing needed to drive demand that will fully invest available funds. Any customer-facing material will need to be approved by Efficiency Maine in advance.

For program initiatives that place the responsibility of driving customer adoption on third-party vendors (i.e., Renewable Reliability), the winning bidder will coordinate with these vendors to ensure marketing materials and efforts align with Efficiency Maine branding guidelines and accurately represent program offerings.

Task 9: Incentive Processing

Currently, the Demand Management Program processes about 500 rebate checks per year. However, in Triennial Plan VI, this number will grow to a peak of several thousand. These incentives will be issued either directly to the customer or, in some cases, to the TPO with which they have entered a service agreement (Renewable Reliability). Performance incentives will be issued following evaluation of system performance during peak periods.

Task 10: Support for Efficiency Maine “Corporate Marketing”

As directed by the Trust, the winning bidder will provide support such as recommending program participants who could provide testimonials on their experiences, providing and analyzing program progress data, and providing any other information needed by Efficiency Maine for promotional initiatives that may go beyond program marketing.

Task 11: Support for Maintenance of efficiencymaine.com Website

The winning bidder will provide program-related recommendations to Efficiency Maine’s web team and provide information necessary to keep the site accurate at all times.

Task 12: Support for Efficiency Maine Home Energy Loans

Efficiency Maine offers loans for all energy efficiency measures that are eligible for rebates. While loans are outside the scope of this RFP, we may call upon the winning bidder to support the loan team. Examples include modifying program materials like brochures, web pages (via Efficiency Maine's web team), and mailers.

Task 13: Support Program Evaluation Studies and Measurement and Verification Research

The winning bidder will support independent program evaluators, as requested. The type of information may include inspection reports, sample rebate claim forms, program participant contact information, installer contact information, etc. Additional data and research may also be required to support Efficiency Maine's measurement and verification activities.

Task 14: Weekly Program Reporting

The winning bidder must provide weekly reports in Excel or similar format as approved by the Trust. Reports include:

1. Fiscal year-to-date actual vs plan and forecasted full-year vs plan:
 - Rebates by type
 - incentive, administrative ("delivery"), and marketing costs
 - Energy savings;
2. Full-year rebate quantity and cost forecast by week by measure; and
3. Trade ally program participation (e.g., by number of upgrades).

Task 15: Budget Management

The winning bidder will be responsible for managing program delivery in such a way as to exceed savings goal without exceeding the budget.

Task 16: Billing

Invoices must include sufficient backup to allow the Trust to confirm that they are legitimate. For example, billed hours by employee and rates matching the contracted rates must be outlined and any expenses passed through without markup.

Task 17: Program Transitions

The winning bidder must work with all succeeding contractors to accomplish smooth transitions. Transitions must be performed in an organized and efficient manner with a minimum of disruption to customers, trade allies, retailers, distributors, manufacturers and other energy-efficiency service partners.

SECTION 4 – PROPOSAL REQUIREMENTS

4.1 Proposal Submission

Proposals must be submitted electronically via the online Submission Form on the RFP EM-008-2025 webpage (<https://www.energymaine.com/opportunities/rfp-em-008-2025/>.) All proposals must adhere to the instructions and format requirements outlined in this RFP, in the online Submission Form instructions, and in the written supplements and amendments issued by the Trust. The online Submission Form will request the following documents:

- RFP response (see 4.3), including Additional Materials (References, Resumes, Samples)
 - PDF format file named “Proposal_Bidder_Name_RFP_008_2025”
- Attachment A - Project Cost Proposal Form
 - Excel format file named “Project_Cost_Bidder_Name_RFP_008_2025”
- Suggested redlines to Attachment B - Standard Agreement [if applicable]
 - Word format file named “Standard_Agreement_Bidder_Name_RFP_008_2025”
- Attachment C – Team Commitment Form [if proposal involves any subcontractors]
 - PDF format file named “Team_Commitment_Bidder_Name_RFP_008_2025”
- Any additional relevant documents (Word, PDF, or Excel format, as appropriate) [if applicable]

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, presented in the following order:

1. **Table of Contents**
2. **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.

3. **Statement of Work (15 pages maximum)**

This section must include how the bidder plans to achieve each of the tasks outlined in Section 3. Provide examples of successfully conducting similar activities for other clients.

4. Qualifications, Staffing and Management (10 pages maximum)**a. Corporate Qualifications**

Describe the bidding team's qualifications, including brief descriptions of past experience on contracts of similar scope and size. For each, provide the client 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 with other Additional Materials (see section 4.3(6)).

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. Disclosures

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. Disclose and provide details regarding any debarring or delisting from performance on federal government contracts or by the State of Maine within the three years preceding the date of submission of this proposal.

5. Cost Proposal (use Attachment A - Project Cost Proposal Form provided)**a. Narrative**

Provide a brief narrative explanation of the project cost proposal, and an explanation of all relevant cost assumptions.

b. Cost Form

Provide a completed Project Cost Proposal Form (Attachment A) 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. Provide separate rates by program year (July 1 – June 30) for FY2025, FY2026, FY2027, and FY2028.

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.

6. Additional Materials

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. 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.

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
<p>1. Statement of Work</p> <ul style="list-style-type: none"> a. Does the Statement of Work present a comprehensive, sound approach for accomplishing the requirements of this RFP? b. Is the Statement of Work thorough, specific and responsive to the requirements and details specified in the RFP? c. Does the proposal demonstrate a clear understanding of the Statement of Work and the Trust's expectations? d. Does the Statement of Work reflect best practices in delivering the specific programs described in this RFP? 	40
<p>2. Staff and Organization Qualifications</p> <ul style="list-style-type: none"> a. Is the proposed project staffing plan clear, well-defined, appropriate and realistic for the scope of the services requested? b. How qualified are the proposed personnel in terms of skills, expertise and experience relevant to this program? c. How qualified are the proposed organizations (lead bidder and subcontractors) in terms of demonstrated experience and capacity to execute this type of program? 	30
<p>3. Project Cost/Budget</p> <ul style="list-style-type: none"> a. Are appropriate resources being devoted? b. How does the total bid cost compare to other comparable proposals? c. Is the proposed budget consistent with the requested Statement of Work? d. How do the quoted rates compare to other comparable proposals? 	20
<p>4. Overall Quality and Responsiveness</p> <ul style="list-style-type: none"> a. What is the overall quality of the proposal submission, including: completeness, clarity, attention to detail, adherence to instructions and lack of errors? 	10

b. Does the proposal reflect and respond to the Trust’s priorities? c. Does the proposal seek changes or exceptions?	
Total	100