EFFICIENCY MAINE TRUST
REQUEST FOR PROPOSALS (RFP) FOR
WEATHERIZATION PROGRAMS IMPACT EVALUATION

RFPEM-021-2025

Date Issued: March 19, 2025

Proposals Due: May 14, 2025, 11:59 p.m. Eastern Time (US)

Table of Contents

Separate attachments:
Attachment A – Project Cost Proposal Form
Attachment B – Standard Agreement
Attachment C – Team Commitment Form
Attachment D – Confidential Information Management System Policy

SECTION 1 – RFP INFORMATION AND INSTRUCTIONS

1.1 Purpose

The Efficiency Maine Trust (the Trust) seeks a qualified contractor or team of contractors to perform an independent impact evaluation of the weatherization measures offered through the Trust's residential programs. The primary purpose of the evaluation is to quantify the energy savings and related impacts of the measures.

1.2 Designated Contact Person for this RFP

Dan Mistro
Strategic Initiatives Manager
Efficiency Maine Trust
Phone: (207) 213-4152
Email: dan.mistro@efficiencymaine.com

1.3 Schedule

	Milestone	Date/Deadline
1	RFP Issued	03/19/2025
2	Questions Due	04/02/2025
3	Responses to Questions Posted	04/07/2025
5	Proposals Due	05/14/2025, 11:59 p.m. Eastern Time (US)
6	Anticipated Award Date	06/04/2025
7	Anticipated Contractor Start	06/30/2025

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-021-2025 webpage at https://www.efficiencymaine.com/opportunities/rfp-em-021-2025/.

1.4 Anticipated Contract Term

The Trust anticipates a period of performance from June 2025 through fall 2026, with a completion date no later than December 2026..

1.5 Anticipated Contract Budget

The Trust will develop a budget for this evaluation after reviewing submitted bids. Bidders are encouraged to propose the most cost-effective evaluation methods that meet the requirements laid out below. Proposals that include a base scope and optional tasks priced separately will be considered. The contract will be structured on a Time and Materials basis with a Not-To-Exceed maximum budget.

1.6 Proposal Submittal Deadline

All proposals must be submitted electronically via the online Submission Form on the RFP EM-021-2025 webpage (https://www.efficiencymaine.com/opportunities/rfp-em-021-2025/). 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: "Weatherization Programs Impact Evaluation Questions". Responses to questions will be posted on http://www.efficiencymaine.com/opportunities/rfp-em-021-20225, as will all clarifications and amendments released regarding 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 Agreements

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 follow the Trust's Confidential Information Management System Policy and complete Appendices A and B of the agreement, see **Attachment D**. 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.

1.14 Conflict of Interest

In order to avoid conflicts of interest and ensure independence in the conduct of the program evaluation, entities may not bid for this evaluation if they are involved in (1) any aspect of the design, implementation or delivery of the program being evaluated; (2) in the installation, technical assistance analysis, application or commissioning of a measure being evaluated; or (3) currently under contract with the Maine Public Utilities Commission for services related to Efficiency Maine Trust.

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 on the Home Energy Savings Program and Income-Eligible Home Programs

The Home Energy Savings Program (HESP) and Income-Eligible Home Programs drive installation of home weatherization and efficient heating systems by offering rebates and loans, providing customer and vendor education, and developing and maintaining a vendor network. Both programs encourage energy upgrades in single-family homes, manufactured homes, multifamily homes with two units, and condominiums. HESP is available broadly to Maine residents and the Income-Eligible Home Programs targets income eligible households specifically, with higher rebates for moderate- and low-income households. All residential weatherization rebates administered by the Trust go through one of these two programs.

2.3 Efficiency Maine Reporting and Tracking (effRT)

The Trust's programs are data-driven and their success hinges on the capacity to measure and verify the energy and cost savings derived from program participation. The primary tool that Efficiency Maine has developed for data management is known as the Efficiency Maine Reporting & Tracking System (effRT) database. The database platform manages the data for all of the Trust's active programs and ensures consistent and accurate estimates of energy savings. The effRT database is SQL-based with an online interface created and currently maintained with ASP.net tools. The winning bidder will be required to use the data already in effRT in evaluating the measures.

The two measures that we will be evaluating in this RFP are for "Insulation Rebate" in our HESP program and "LMI Insulation Rebates" for low- and moderate-income participants in our Income-Eligible Home programs. These two measures represent any mix of insulation and air-sealing upgrades that an eligible home makes. The Trust seeks to evaluate these measures by determining a statistically significant realization rate of the Insulation Rebate and LMI Insulation Rebate measures overall, rather than the individually insulated zones that are made up from the measures. Table 1 provides the quantities of all Insulation Rebate and LMI Insulation Rebate measures that include at least 1 insulated zone by program throughout the evaluation period of July 2022 through June 2024.

Table 1

Program	Insulation Rebate (includes at least 1 insulated zone)	LMI Insulation Rebate (includes at least 1 insulated zone)
HESP	4220	0
Moderate Income	0	741
Low Income	0	952
All Programs	**4220**	**1693**

Table 2 provides quantities of all the individual zones included in projects that received rebates administered by The Trust throughout the evaluation period of July 2022 through June 2024. Homes can receive a rebate for each zone of the home that they insulate as well as for air-sealing any region of their home. The "Total Homes" column in the table represents the number of homes that have received at least one insulation rebate.

Table 2

Program	Air Sealing	Attic Insulation	Basement Insulation	Underbelly Insulation	Wall Insulation	Total Homes
HESP	2079	2791	2254	57	942	**4220**
Moderate Income	271	441	368	10	146	**741**
Low Income	584	651	527	29	215	**952**
All Programs	**2934**	**3883**	**3149**	**96**	**1303**	**5913**

The Trust anticipates that homes that are heated exclusively with natural gas or propane may be the homes best suited for a billing analysis. Table 3 provides quantities of all weatherization upgrades administered by the Trust in which natural gas or propane are listed as the customers' primary heating fuel. The Trust proposes targeting these homes first and depending on the sample size, using the larger pool as needed.

Table 3

Program	Air Sealing	Attic Insulation	Basement Insulation	Underbelly Insulation	Wall Insulation	Total Homes
HESP	383	549	451	11	199	853
AHI - Moderate Income	27	62	62	0	23	104
AHI - Low Income	72	95	87	2	43	150
All Programs	482	706	600	13	265	1107

2.4 Utility Data

The Trust has the statutory authority to obtain customer-specific billing data from the electric and natural gas utilities. The quality and extent of billing data and advanced metering infrastructure (AMI)/electric interval data available and the time necessary to obtain it varies by utility. Proposals recommending the use of AMI data should note any software licensing fees associated with its analysis. Note that the Trust does not record utility account numbers in effRT for weatherization rebate recipients.

The Trust does not have statutory authority to obtain customer-specific data for other delivered fuels such as oil, propane, kerosene, or wood. These are the most common heating sources in Maine. Any data needed for these fuels will need to be gathered with the help of the participant directly. In some cases, fuel dealers will provide information to the Trust or our partners with a signed agreement from the participant. The work plan should include gathering this information from providers and/or participants. Past experience has shown that propane and natural gas data are typically easier to gather and analyze than other heating fuels. The Trust proposes that the study first analyze these homes and target homes heated with other fuels as needed to meet the appropriate sample size. We anticipate the sample size for a billing analysis in this study will be around 100 homes in total, with a representative mix in measures, home sizes, and locations in the state.

2.5 Additional Sources of Information

Following are links to additional information that bidders may find helpful in preparing a response to this RFP. The last weatherization impact evaluation conducted by the Trust in 2019 appears in the Efficiency Maine Trust Home Energy Savings Program Impact Evaluation.

TITLE	LOCATION (link)
Efficiency Maine Trust website	www.efficiencymaine.com
Efficiency Maine Trust Annual Reports	https://www.efficiencymaine.com/about/library/reports/
Efficiency Maine Trust – Triennial Plan	https://www.efficiencymaine.com/about/library/policies/

TITLE	LOCATION (link)
ISO-NE M-MVDR	https://www.iso-ne.com/static-assets/documents/2017/02/mmvdr_measurement-and-verification-demand-reduction_rev6_20140601.pdf
Rule Chapter 2	http://www.efficiencymaine.com/docs/Chapter-2-Administration-of-Trust-Budgeting-Project-Selection-Criteria-and-Procedures-Monitoring-and-Evaluation-Requirements-Energy-and-Carbon-Savings-Trust.pdf
Efficiency Maine Trust Retail/Residential Technical Resource Manual	https://www.efficiencymaine.com/docs/EMT-TRM_Retail_Residential_v2025_2.pdf
Residential Baseline Study (2024)	https://www.efficiencymaine.com/docs/Maine_Residential_Baseline_2024.pdf
Efficiency Maine Trust Home Energy Savings Program Impact Evaluation	https://www.efficiencymaine.com/docs/HESP-Evaluation-2019.pdf

SECTION 3 –SCOPE OF WORK

3.1 Overview and Objectives

The Trust seeks an independent evaluation of its residential weatherization measures. The primary objectives of the evaluation are to quantify and verify energy and demand savings, establish typical charging profiles, and analyze program cost-effectiveness. Consistent with these objectives, the overall evaluation project will include an impact evaluation and cost-benefit analysis which are further described in section 3.2. The contractor must provide a rigorous evaluation of the Program, consistent with available resources, and deliver timely information and results to the Trust.

3.2 Task by Task Description

The contractor is expected to perform the following tasks:

Task 1: Project Kickoff Meeting

The winning bidder, in consultation with the Trust, will organize and facilitate a Project Kickoff Meeting to be held at the Trust's offices with virtual participation as appropriate. The purpose of the meeting is for the Trust and the contractor to establish a common understanding of the deliverables, the overall project schedule, and expectations regarding the conduct of the program, and to provide the foundation for development of the work plan. At a minimum, this meeting should include discussion of the proposed statement of work and schedule, initial data requests, and communication protocols and expectations.

Task 1 Deliverables: *Kickoff Meeting materials*

Task 2: Evaluation Work Plan

The contractor will develop a detailed Work Plan that specifies the specific approach, schedule, implementation and quality assurance plan, for each task, sub-task and deliverable required under the project. The Evaluation Plan should follow the basic structure and format of the proposed Statement of Work, with revisions, modifications and additional detail incorporated as appropriate. For each primary data collection activity, the Evaluation Plan should specify the sample design and methodology, data collection methods and processes, confidence level goals, and quality assurance procedures.

Task 2 Deliverables: *Draft and Final Project Evaluation Plan*

Task 3: Sampling and Data Collection

The contractor will draw samples and collect the necessary data to perform the: (1) impact evaluation, including measurement and verification of energy and demand savings for all unregulated fuel, natural gas, and electric measures and characterization of free ridership (cost-effective methods for determining spillover will also be considered); and (2) cost-benefit analysis. As discussed further in Section 4 of this RFP, sampling should be designed to yield aggregate precision of at least +/- 10% at an 80% confidence level.

At a minimum, data collection efforts are expected to include:

- Review of data tracking system;
- Review of Technical Reference Manual measure entries;
- Verification of measure installation;
- Pre and post upgrade energy usage data for roughly 100 total homes;
- Historical temperature data to normalize energy usage;
- Customer survey; and
- Contractor survey.

Task 3 Deliverables: *Draft and Final Data Collection Instruments and Protocols; Data Files.*

Task 4: Analysis

The contractor will analyze data as necessary to complete the impact evaluation and cost-benefit analysis.

Task 4a: Impact Evaluation

The impact evaluation will examine the energy and demand savings of the program. The contractor will:

- Design a sampling plan to obtain precision of +/- 10% or better at an 80% confidence level
  - The Trust anticipates a billing analysis of roughly 100 combined Insulation Rebate and LMI Insulation Rebate homes with a representative mix of insulated zones, home sizes, and locations in the state
- Determine the appropriate baseline against which to assess impacts
- Determine verified gross energy and demand impacts of the Insulation Rebate and LMI Insulation Rebate measures
- Calculate in-service rates and gross realization rates for energy and demand savings for the Insulation Rebate and LMI Insulation Rebate measures
- Explain differences and identify key drivers between tracked and verified savings by measure type
- Identify potential Technical Reference Manual (TRM) updates to improve future gross savings estimates
- Determine net energy and demand savings attributable to the initiatives and compute net-to-gross ratios; provide estimates and analysis of free ridership and spillover
  - Both customer and contractor surveys may be needed to calculate the net-to-gross ratios

Task 4b: Cost-Benefit Analysis

The cost-benefit analysis will examine the cost-effectiveness of the program. The analysis will be performed using the methodology and assumptions applicable to the period under evaluation. The Trust will provide an Excel-based implementation of the approved methodology and assumptions as well as provide access to Cost Benefit Analysis Tool (CBAT) hosted in effRT[1]. A sensitivity analysis must be included that considers evaluation uncertainty and alternative methodologies for the calculation of

[1] CBAT is configured with prescribed avoided costs, discount rate, and generation mark-up. Cost-effectiveness will be assessed using the Trust's values for avoided costs, discount rate, and generation mark-up that were in place at the time of measure installation.

benefit/cost ratios. The cost-benefit analysis will meet the following objectives for measures installed under the program during the evaluated period:

A. Verify benefit/cost calculation
B. Determine the following for Insulation Rebate and LMI Insulation Rebate measures:
    a. Verified measure costs based on the costs of installed efficiency measures and appropriate baseline costs
    b. Lifetime benefits of verified savings (gross and net)
    c. Lifetime costs of fuel use increases (gross and net)
    d. Measure level benefit/cost ratios (excluding program delivery and marketing costs) using prescribed and alternate methods
C. Compile program delivery and marketing costs
D. Determine program level benefit/cost ratio using prescribed methods and sensitivity analysis
E. Identify key drivers of differences between the program estimated benefit/cost ratio and those calculated from verified savings and costs and sensitivity analysis

Task 4 Deliverables: *Interim Memos.*

Task 5: Project Management and Reporting

The contractor will manage all aspects of the evaluation project, including management of all tasks and sub-tasks, any subcontractors and submission of all deliverables. Management of the project should be designed to deliver high quality, on-time, on-budget services to the Trust. As part of this ongoing task, the contractor will, at a minimum:

- Implement formal and informal communication strategies throughout the contract period to maintain effective and timely communication with the Trust
- Provide monthly status reports to the Trust that summarize the accomplishments during the prior month, the current month's activities, schedule and any issues or concerns that need to be addressed
- Prepare interim memos documenting key findings as they are reached
- Prepare a comprehensive draft and final report on the evaluation
- Prepare a draft and final presentation summarizing the methodology and key findings of the evaluation

Task 5 Deliverables: *Monthly Project Status Reports; Draft and Final PowerPoint Presentation; Draft and Final Evaluation Reports.*

3.3 Project Deliverables

The winning bidder must complete all requirements specified in the Scope of Work in a timely manner. Specific deliverables may include, but are not limited to, the following:

1. Draft and Final Kick off Meeting materials
2. Draft and Final Evaluation Plan
3. Draft and Final Data Collection Instruments and Protocols
4. Original data files and final, cleaned evaluation data and analysis files resulting from the evaluation

5. Interim Memos
6. Monthly Project Status Reports
7. Draft and Final PowerPoint Presentation of Project
8. Draft and Final Evaluation Report

The contractor must commit to completing all deliverables**.** Specific deadlines for each deliverable will be determined as part of the Evaluation Plan. The contractor is responsible for providing the Trust with electronic copies of all deliverables in Microsoft Office software format or other appropriate editable format approved by the Trust.

SECTION 4 –PROPOSAL REQUIREMENTS

4.1 Proposal Submission

Proposals must be submitted electronically via the online Submission Form on the RFP EM-021-2025 webpage (https://www.efficiencymaine.com/opportunities/rfp-em-021-2025/.) 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_021_2025"
- Attachment A - Project Cost Proposal Form
    - Excel format file named "Project_Cost_Bidder_Name_RFP_021_2025"
- Suggested redlines to contract documents, including, Attachment B - Standard Agreement [if applicable]
    - Word format file named "Standard_Agreement_Bidder_Name_RFP_021_2025"
- Attachment C – Team Commitment Form [if proposal involves any subcontractors]
    - PDF format file named "Team_Commitment_Bidder_Name_RFP_021_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, which should be 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 (13 pages maximum)

a. Overview

Provide an overview of the proposed approach. Describe how the project is to be implemented to fulfill the objectives of the evaluation, as specified by the Trust, and the requirements of the Scope of Work (RFP Section 3).

b. Task-by-Task Evaluation Plan

Describe the proposed evaluation plan for accomplishing each individual task and sub-task specified in the Scope of Work. Each task-specific evaluation plan should outline the approach to the task.

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. If the prime bidder or any subcontractors on the team are minority- or women-owned businesses, please include information as part of the corporate qualifications

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 the reasonableness of the basis for the budget proposed. All related expenses must be included and itemized on this form; any costs not included on this form will be disallowed.

The winning bidder will be bound by the labor rates and a 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.

c. Samples

Please provide up to three samples (URLs or attachments) of recent work pertinent to the RFP.

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
1. Statement of Work **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?	30
2. Staff and Organization Qualifications **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
3. Project Cost/Budget **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?	30
4. Overall Quality and Responsiveness **a.** What is the overall quality of the proposal submission, including: completeness, clarity, attention to detail, adherence to instructions and lack of errors? **b.** Does the proposal reflect and respond to the Trust's priorities? **c.** Does the proposal seek changes or exceptions?	10
5. Total	**100**