



**EFFICIENCY MAINE TRUST
REQUEST FOR PROPOSALS (RFP) FOR
Electric Bike Pilot**

RFP EM-012-2024

Date Issued: January 11, 2024

Proposals Due: March 7, 2024, 11:59 p.m. Eastern Time (US)

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Separate attachments:

- Attachment A – Project Cost Proposal Form
- Attachment B – Sample Grant Agreement
- Attachment C – Confidentiality, Non-Disclosure and Protective Agreement
- Attachment D – Team Commitment Form
- Attachment E – W9

SECTION 1 – RFP INFORMATION AND INSTRUCTIONS

1.1 Purpose

The Efficiency Maine Trust (the Trust) seeks proposals from public housing agencies/authorities, community action agencies, or nonprofit organizations serving low- to moderate-income individuals to conduct one or more pilot projects demonstrating the use of electric bicycles (e-bikes) in Maine. Eligible applicants must make e-bikes available for use by the applicant’s residents, clients, employees, or volunteers to offset transportation that would otherwise be provided by fossil fuel vehicles. During the term of the pilot, ownership of the e-bikes may not be transferred to individual riders and must remain with the applicant or its agent. The proposals must include plans to purchase, use, and maintain e-bikes during the term of the pilot.

1.2 Designated Contact Person for this RFP

Hogan Dwyer
 Program Assistant
 Efficiency Maine Trust
 168 Capitol Street, Suite 1
 Augusta, ME 04330-6856
 Phone: 866-376-2463
 Email: hogan.dwyer@efficiencymaine.com

1.3 Schedule

Milestone	Date/Deadline
RFP Issued	1/11/2024
Bidders’ Informational Webinar #1	1/25/2024
Questions Due	2/1/2024
Responses to Questions Posted	2/15/2024
Proposals Due	3/7/2024, 11:59 p.m. Eastern Time (US)
Anticipated Award Date	4/4/2024
Anticipated Contract Start	4/18/2024

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-012-2024 webpage at <https://www.efficiencymaine.com/rfp-em-012-2024/>.

1.4 Bidders’ Informational Webinars

For interested bidders, the Trust will offer an informational webinar that will cover project eligibility and RFP requirements. Attendance of the webinar is not a prerequisite for bidding. Bidders may sign up using the following link:

- Thursday, January 25, 2024 from 9:00 a.m. to 10:00 a.m. – https://efficiencymaine.zoom.us/webinar/register/WN_PCJM_RVOT5ezsqHuAakXbA

1.5 Anticipated Contract Term

The term of the Grant Agreement (“Agreement” or “Contract”) will be for three (3) years; the Trust will require the project to be operational within the first year with all expenses reimbursed. Annual reporting will extend throughout the full three-year term of the pilot.

1.6 Anticipated Pilot Budget

The Trust’s total budget available through this RFP is approximately \$50,000. The Trust anticipates making grant awards to one or more bidders within the available budget.

1.7 Proposal Submittal Deadline

All proposals must be submitted electronically via the online Submission Form on the RFP EM-012-2024 webpage (<https://www.efficiencymaine.com/rfp-em-012-2024/>).

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 received. (Note: There may be a delay of a few minutes between submission and this confirmation email.) Proposals 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 the Trust requests of bidders. Bidders are responsible for ensuring their bids are timely received before the deadline, and the Trust encourages bidders to submit their proposals with sufficient time to account for any technological challenges (e.g., internet disruptions, power outages) or potential delays in transmittal.

1.8 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: “E-bike Pilot RFP”. Responses to questions will be posted on <https://www.efficiencymaine.com/rfp-em-012-2024/>, 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.

1.9 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., and all information received by the Trust is considered a public record unless there is a specific, applicable 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 available for public inspection pursuant to the Maine FOAA following announcement of an award decision.

1.10 Contract Award

The Trust will notify all bidders of the contract award decision by email. The Trust may make multiple awards under this RFP, or it may make a single award to an entity serving multiple locations. The Trust reserves the right to award all or part of a winning bidder’s proposal. The Trust reserves the right to negotiate the final terms and conditions of the contract award with any bidder whose proposal is selected for an award by the Trust, and to reject any awarded 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.

1.11 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:

efficiencymaine.com/docs/Chapter-1-Contracting-Process-for-Service-Providers-and-Grant-Recipients.pdf.

1.12 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.

1.13 Contract Agreement

A copy of the Efficiency Maine Trust Grant Agreement that will be used in connection with this RFP is provided as **Attachment B – Sample Grant Agreement (Agreement)**. This document will complete the agreement for services between a winning bidder and the Trust.

1.14 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 at the link provided in Section 1.11 of this RFP.

SECTION 2 –BACKGROUND INFORMATION

2.1 Efficiency Maine Trust

The Efficiency Maine Trust (Efficiency Maine) 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

LD 256 *An Act to Add Electric Bicycles to the Electric Vehicle Rebate Program* was signed by the Governor on 6/8/2023. This legislation directed Efficiency Maine to include electric bicycles in the types of electric vehicles that are eligible under the electric vehicle rebate program, so long as the program eligibility was limited to low- and moderate-income individuals and entities that serve those individuals. The Trust is piloting this program with organizations that serve low- and moderate-income Mainers. The pilot further prioritizes urban areas.

2.3 Project Goals and Objectives

The goal of the Trust's pilot program is to gain information about the degree to which e-bikes can provide a cost-effective, practical pathway to reducing energy costs and carbon emissions associated with the combustion of fossil fuels in Maine's transportation sector.

The Trust seeks proposals to demonstrate the use of e-bikes through the implementation of one or more pilot projects in Maine. Eligible bidders must make e-bikes available for use by the bidder's residents, clients, employees, or volunteers to offset transportation that might otherwise be provided by fossil fuel-powered vehicles. During the term of the pilot, ownership of the e-bikes may not be transferred to individual riders and must remain with the bidder or its agent. The proposals must include plans to purchase, use, and maintain e-bikes during the term of the pilot. The bidder may partner with an e-bike manufacturer, distributor, or Maine-based retailer (e.g., a bike shop) in the delivery of its pilot.

The Trust seeks to award projects that demonstrate the greatest potential to lower transportation costs and carbon emissions from fossil fuel-powered vehicles and have a high likelihood of sustained use throughout the 3-year term of the agreement and thereafter. The Trust seeks projects that have a high likelihood of being implemented starting within one year of the bid.

2.4 Definitions

The following definitions will apply in this RFP:

1. **Bidder:** means the lead party that submits a proposal in response to this RFP, who is subject to the eligibility requirements of Section 2.6.2 and will be the counterparty in a Grant Agreement with the Trust in the event the bid is awarded.

2. **Electric Bike (E-bike):** means a 2-wheel or 3-wheel bicycle with fully operable pedals and an electric motor of less than 750 watts that is a Class 1 electric bicycle, a Class 2 electric bicycle or a Class 3 electric bicycle as defined below.
 - (a) "Class 1 electric bicycle" means an electric bicycle equipped with a motor that provides assistance only when the rider is pedaling and that ceases to provide assistance when the bicycle reaches a speed of 20 miles per hour.
 - (b) "Class 2 electric bicycle" means an electric bicycle equipped with a motor that is capable of being used exclusively to propel the bicycle but is not capable of propelling the bicycle at a speed of 20 miles per hour.
 - (c) "Class 3 electric bicycle" means an electric bicycle equipped with a motor that provides assistance only when the rider is pedaling and that ceases to provide assistance when the bicycle reaches a speed of 28 miles per hour.¹
3. **Maintain:** means "to provide all needed repairs or desired and approved alteration, as well as regular maintenance needed to ensure optimal performance. Equipment shall be kept safe and presentable;"

2.5 Reserved

2.6 Incentives and Eligibility

2.6.1 Incentives

The funds awarded from the Trust through this RFP will be used to cover eligible e-bike costs. The Trust will provide up to 100% of the eligible e-bike costs. The amount of the incentive to be paid by the Trust, on a reimbursement basis, will be the lesser of (a) the Funds Requested (see Attachment A – Project Cost Proposal Form) in the bid or (b) 100% of the eligible e-bike costs actually incurred as documented in receipts and paid invoices.

2.6.2 Eligible Bidders and Users

- a. Entities that are eligible to bid and serve as the counterparty to the Trust in the Grant Agreement must be organizations that serve low-income residents or clients, limited to:
 - i. Housing authorities;
 - ii. Community Action Agencies (CAPs);
 - iii. Nonprofit organizations
- b. Individuals who are eligible to use the e-bikes are the residents, clients, employees, or volunteers of the bidder;
- c. Eligible uses of the e-bikes are commuting to and from work, school, or classes, and/or performing duties while at work.

2.6.3 Eligible Costs

The costs of the following items will be eligible for the financial incentive through the grant award made under this RFP:

- a. E-bike(s) meeting the definition in Section 2.4;
- b. Shipping of e-bike(s);

¹ 29-A MRS §101(22)(B).

- c. Extended warranties or maintenance contracts for a period not to exceed three (3) years when billed and paid as a single, upfront, lump-sum cost.

2.6.4 Non-Eligible Costs

The costs of the following items or activities are not eligible for use of the funding from this RFP, (i.e., these costs may not be included in Attachment A – Project Cost Proposal Form and to the extent bidders incur these costs, the costs will not be eligible for reimbursement from the funds awarded through this RFP):

- a. All operating costs, including but not limited to personnel wages and benefits, rent, electricity bills, management and legal costs, and insurance (recognizing that costs of extended warranties and maintenance contracts meeting the description of 2.6.2(d) are eligible costs);
- b. E-bike personal protective equipment (e.g., helmets, lights, gloves);
- c. E-bike storage (e.g., garage, indoor-parking, locks, charging set up).

2.6.4 Eligible Locations and Preferred Locations

Bids contemplating the use of e-bikes outside of Maine are not eligible and will not be considered.

The Trust will give preference to bids that propose to use the e-bikes in or near the following locations:

- a. Auburn/Lewiston
- b. Bangor
- c. Portland

SECTION 3 –SCOPE OF WORK

3.1 Primary Project Requirements and Tasks

The bids submitted in response to this RFP must identify a lead party who is referred to in this RFP as the “Bidder”. In the event the bid is awarded, the Bidder will be the named party, referred to as the “Recipient”, on the resulting Grant Agreement with the Trust and will be responsible for overall compliance with the terms of the contract and receiving the incentives paid by the Trust. The Bidder will be responsible for ensuring that the e-bikes are purchased, used, and maintained consistent with the RFP, the bid proposal, and the Grant Agreement, and that any documentation or reporting required by the RFP is supplied to the Trust. The Bidder may enlist the assistance of other parties or agents in performing one or more elements in the scope of work. The scope of work described in the proposal for this pilot project must include the following elements:

3.1.1 Purchase E-bikes

Purchase e-bike(s) meeting the definitions in section 2.4. Recipient shall **not**, during the term of the contract, sell an e-bike purchased in whole or in part with funds awarded through this RFP without **prior written approval** from the Trust.

3.1.2 Provide Ongoing Operation and Maintenance and Customer Service Support

The Recipient or its agent(s) must:

- a. Present a plan to house, operate, charge, and maintain each e-bike for at least three (3) years from the date of the Grant Agreement;
- b. Be responsible for ensuring the maintenance of the e-bike(s), consistent with the definition of “Maintain” presented in Section 2.4.

3.1.3 Reporting

The Recipient will be asked to submit periodic progress reports to the Trust including, but not limited to, the status of procuring the e-bikes, usage, and costs of operations and maintenance. A winning bidder must comply with certain requirements to capture and report data relating to the use, costs, and performance of the e-bikes.

SECTION 4 – PROPOSAL REQUIREMENTS

4.1 Proposal Submission

Proposals must be submitted electronically via the online Submission Form on the RFP EM-012-2024 webpage (<https://www.energymaine.com/rfp-em-012-2024/>). 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
 - PDF format file named “Proposal_Bidder_Name_RFP_012_2024”
- Attachment A – Project Cost Proposal Form
 - Excel format file named “Project_Cost_Proposal_Form_BidderName_RFP_012_2024”
- Suggested redlines to Attachment B – Sample Grant Agreement [if applicable]
 - Word format file named “Grant_Agreement_BidderName_RFP_012_2024”
- Attachment C – Confidentiality, Non-Disclosure and Protective Agreement
- Attachment D – Team Commitment Form [if applicable]
- Attachment E – Completed W-9

4.2 Format Requirements

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

- Proposals must be typewritten.
- Pages must be numbered.
- 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. Letters of Commitment

If the proposal involves any other parties (or agents) who will be engaged in performing the scope of work, such as bike manufacturers, bike retailers, repair shops, or subcontractors, please include a letter of commitment from each member of the bid team, signed by an appropriate officer of the party.

2. Introduction (1 page maximum)

Briefly describe your organization and summarize the proposed approach to fulfilling the requirements of this RFP. Briefly reference any other parties that are contemplated to play a significant role in performing the scope of work.

3. Statement of Work/E-bike Plan (5 pages maximum)

Describe how the project is to be implemented to fulfill the objectives of the RFP, as specified by the Trust, and the requirements of the Scope of Work (Section 3). Describe the following:

- **Entity:** Describe your organization.
- **Constituents:** How does your organization serve low-to moderate-income Mainers?
Planned Use of E-Bikes: What is your plan to employ the e-bikes and deliver the requirements of the Scope of Work in Section 3?
- **E-bike(s):** Identify the type and quantity of e-bikes your proposal seeks to purchase. Describe the e-bike(s) being proposed, including but not limited to:
 - Make, model;
 - Specifications of the e-bike(s); and
 - How the models selected meet identified needs (e.g., cargo bike for deliveries; commuter bike for traveling to employment site).
- **Operations and Maintenance:** Describe the plan to operate and maintain the e-bike(s) and access to them, including:
 - How e-bike maintenance will be accomplished;
 - Available technical resources; and
 - Applicable warranties, maintenance or service contracts, and insurance.
- **E-bike disposition:** Describe the plan for the ultimate disposition of the e-bikes upon completion of the three-year term of this pilot.

4. Readiness (1 page maximum)

a. Capacity and Qualifications of Bid Team

Explain how the capacity and qualifications of the proposed Bidder, together with any parties named as collaborators in the proposal, will contribute to making the proposal successful. Reference the financial resources, personnel, and relevant qualifications or experience of the Bidder to conduct this project over the term of the pilot. Also reference the relevant qualifications, resources, and experience of any key parties or agents that will be assisting in delivering the scope of work.

b. Schedule

Include a timeline for implementation. Bidders should also note issues or conditions that will need to be resolved before the project can begin.

5. Project Cost Proposal Form (use Attachment A)

- Provide a completed budget detailing the project's total estimated eligible costs and the amount of Trust grant funds being requested (see below). Eligible costs are enumerated in Section 2 of the RFP.
- Provide documentation for costs, such as quotes from stores, manufacturers, and service providers.

6. Proposed Equipment Spec Sheets

Attach documents (e.g., "spec sheets") that summarize the performance and other characteristics of the e-bikes and any associated eligible equipment and maintenance contracts that are expected to be purchased, in whole or in part, with the funding from this 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. Proposals will be evaluated by individual site location.

Scoring Category	Maximum Points
1. Plan <ul style="list-style-type: none"> a. Does the proposal make a convincing case for the benefits of e-bikes to the operations of the host entity? b. Are e-bikes a viable solution to transportation challenges that the host entity and/or clientele is/are facing? 	60
2. Budget <ul style="list-style-type: none"> a. Is the proposal competitive on costs relative to other similar proposals? 	20
3. Readiness <ul style="list-style-type: none"> a. To what extent are the key participants in the project (host entity, staff, equipment provider) identified and committed to the project? b. How compelling is the proposal's evidence or explanation about why the host entity is likely to be sustainable and remain beyond the 3-year term? c. How qualified are the proposed project participants in terms of demonstrated experience and capacity to execute this type of project? d. How soon does the bid propose to purchase and use the e-bike(s)? e. Is the proposed timeline sensible, reasonable, and likely to be met? 	15
4. Overall Quality and Responsiveness <ul style="list-style-type: none"> a. 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? b. Does the proposal reflect and respond to the Trust's priorities as described in the RFP? c. Does the proposal include adequate supporting documentation and data to validate the project as proposed? 	5
Total	100