



EFFICIENCY MAINE TRUST

REQUEST FOR PROPOSALS (RFP)

**FOR SUPPORT SERVICES FOR
NON-WIRES ALTERNATIVE (NWA) INITIATIVES**

RFP EM-013-2019

Date Issued: 10/2/2019

Proposals Due: 11/22/2019, 3:00 p.m. Eastern Time (US)

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Separate attachments:

Attachment A – Proposal Cover Sheet Form

Attachment B – Standard Agreement

Attachment C – Project Proposal Cost Form

SECTION 1 – RFP INFORMATION AND INSTRUCTIONS

1.1 Purpose

The Efficiency Maine Trust (the Trust) seeks a qualified bidder or team of bidders to support the Trust in fulfilling its new statutory role of analyzing and developing behind-the-meter (BTM) “Non-Wires Alternatives” (NWA) to traditional transmission or distribution system upgrades in Maine. The qualified bidder or team of bidders will provide technical and economic analysis and knowledge of the functionality, economics and market potential for Distributed Energy Resources (DER). It will assist the Trust in analyzing the degree to which least-cost NWA resources exist and can be developed to defer or displace investment in traditional grid investments on specific circuits of the electric grid that have been identified by the utilities as candidates for future upgrades. The Trust, together with the winning bidder, will collaborate closely with the NWA Coordinator established in Maine’s Office of the Public Advocate and with Maine’s investor-owned utilities.

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	10/2/2019
2	Questions Due	10/25/2019, 4:00 p.m. Eastern Time (US)
3	Responses to Questions Posted	10/30/2019
5	Proposals Due at Efficiency Maine Trust Office	11/22/2019, 3:00 p.m. Eastern Time (US)
6	Anticipated Award Date	12/13/2109
7	Anticipated Contractor Start	1/1/2020

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 from the date of award through June 30, 2022.

1.5 Anticipated Contract Budget

The anticipated budget for this initiative will be flexible based on the shifting nature of the NWA administration and the uncertainty of the size and number of projects that may result. The Trust

anticipates multiple projects over the course of the contract term that will be scoped, structured, and executed on a Time and Materials basis with a not-to-exceed maximum budget.

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. Proposals may be submitted in writing or electronically by email to the contact person indicated in section 1.2.

1.7 Submitting Questions

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: "Support Services for Non-Wires Alternative Initiative RFP Questions". Responses to questions will be posted on <http://www.efficiencymaine.com/opportunities>.

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. Unless there has been an express request by a bidder that certain information within the statutory exemption be designated confidential and the Trust's Board has made an express determination of confidentiality under the Efficiency Maine Trust Act, 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. The Trust also reserves the right to reject noncompliant submissions in response to this RFP and to waive minor formalities in the Trust's reasonable discretion. 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 be used to complete the agreement for services between the winning bidder and the Trust after the award has been made.

The winning bidder and its agents and subcontractors will be required to execute a nondisclosure agreement in conjunction with completing the contract agreement. 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 Trust is the independent administrator of programs to lower the cost and environmental impacts of energy in Maine by promoting energy efficiency, conservation and alternative energy. The Trust does this using multiple means, including delivering financial incentives on the purchase of high-efficiency products to help customers save electricity, natural gas and unregulated heating fuels throughout the Maine economy. The Trust is governed by a stakeholder Board of Trustees with oversight from the Maine Public Utilities Commission.

2.2 Background and Context

Over the last five years, there has been a robust public debate in Maine centered on the most beneficial process and policy to drive cost-effective non-wires alternatives (NWA) in lieu of traditional electricity utility transmission and distribution (T&D) system investments in Maine. The recently amended law¹ requires a robust process for reviewing the needs for, and potential alternatives to, T&D investments by Maine's investor-owned utilities.

Beginning in 2013, Efficiency Maine participated in Maine's pilot NWA project located in the Boothbay region. In that pilot, to help reduce the projected 35.4 MW peak load, approximately 2 MW of various non transmission measures were proposed. Among the resources deployed were energy efficiency, load shifting, on-site diesel generation, energy storage, and photovoltaics. The final report on the pilot was filed with the MPUC in 2017.

On June 14th, 2019 [LD 1181, "An Act To Reduce Electricity Costs through Non Wires Alternatives"](#) was signed into Maine law. The Act creates an independent NWA Coordinator (NWAC) to be housed at the Office of the Public Advocate. It requires certain utility proposals for transmission system upgrades or expansions exceeding certain capacity and dollar thresholds, to be reviewed by the NWAC to determine if NWAs present a viable, cost-effective alternative solution. It also requires the utilities to file and update their distribution system plans annually, and to provide interval data from customers on circuits being considered for transmission or distribution upgrades. When a future utility investment is proposed or contemplated for certain transmission or distribution assets, the law requires the Trust to perform an analysis of the potential for cost-effective NWA resources located ***on the customers' side of the meter***. Where such NWA resources are determined to be both viable and the most cost-effective option(s) then the law further directs the Trust to develop and implement a plan to deploy those resources. Thus, once a utility has identified a circuit or area that is forecasted to present a load-based reliability concern, Efficiency Maine must be ready to quickly analyze, design, and deploy the appropriate mix of NWA resources behind the meter (BTM) within the parameters set forth in the law.

Central Maine Power Company's (CMP) service territory covers 11,000 square miles in central and southern Maine and is within the New England Independent System Operator (ISO-NE) control area. CMP currently serves approximately 624,000 customers across 346 communities and operates approximately

¹ See, Title 35-A MRS Chapter 31, Sub-chapter 2, as amended by PUBLIC Law, Chapter 298, LD 1181, 129th Maine State Legislature, An Act To Reduce Electricity Costs through Nonwires Alternatives.

23,500 miles of distribution lines and 2,900 miles of transmission lines. Retail sales to residential and small non-residential accounts in calendar year 2018 were about 4.4 million megawatt-hours. CMP's retail sales to medium non-residential customers in calendar year 2018 were about 1.9 million megawatt-hours. CMP's retail sales to large non-residential customers in 2018 were about 2.6 million megawatt-hours.

Emera Maine (Emera) consists of two service territories. The Maine Public District service territory covers 3,600 square miles within the Canadian Maritimes control area and is connected to the ISO NE control area by transmission through New Brunswick, Canada. MPD currently serves about 36,700 residential and small non-residential accounts. Retail sales to these customers in calendar year 2017 were about 286,000 megawatt-hours. MPD's retail sales to medium non-residential customers in calendar year 2017 were about 81,000 megawatt-hours.

2.3 NWA Initiatives Analysis and Design

Through this RFP, the Trust is positioning itself to respond quickly to the NWA opportunities as presented by Maine's electric utilities and the NWA Coordinator, and thus seeks proposals from bidders that have the capacity to quickly and effectively address the project(s) when they become active.

NWA Initiative Tasks– The NWA Initiative comprises the following tasks:

1. NWA Analysis –The NWA Coordinator (at the Office of Public Advocate) will be responsible for analyzing the T&D projects for NWA technical and economic feasibility and generating a high-level statement of need that are expected to include the location, size (MW's), timing and duration requirements of NWAs. Those projects will arise through three channels:

- Transmission projects that require a certificate of public convenience and necessity (CPCN) to be issued by the MPUC
- Projects identified by the NWA Coordinator through its evaluation of annual utility filings of transmission line rebuilding or relocation projects that will become or will remain at voltages of 69 kV or more that the utility intends to carry out during the next five years.
- Projects identified by the NWA Coordinator through its review of the distribution and small transmission (i.e. less than \$5 million estimated value) projects as they are described in annual planning studies to be conducted by the utilities. The NWA Coordinator will make recommendations regarding cost effective NWA solutions to the proposed projects. NWAs for distribution projects are limited to investments of \$500,000 or more except that the NWA Coordinator will have the discretion to investigate projects with smaller cost if there appears a reasonable likelihood that an NWA would be cost-effective.

Throughout this process the NWA Coordinator is required to work with stakeholders including the Trust. As such the successful bidder will assist the Trust in its assessment of the potential that BTM NWA would meet the need identified by the NWA Coordinator in any of the situations identified above and determine their viability in satisfying the reliability need and their cost-effectiveness. Once the opportunity has been validated, the successful bidder will advise the Trust on the appropriate technology categories that best address the specific capacity constraints in the defined area.

2. NWA Initiative Design – The Trust will develop BTM NWA solutions. The successful bidder will work with the NWA Coordinator and the appropriate partners to determine and define the availability and

reliability of appropriate NWA BTM resources. This will include defining the implementation requirements for the NWA solution, determining the availability of resources and time to implement the solutions including the Trust's current programs and delivery teams, conducting a benefit/cost analysis, and, if necessary, assisting the Trust in preparing a procurement process to develop and implement the most cost-effective BTM resources.

3. NWA project oversight, and reporting – The successful bidder will assist the Trust, as necessary, in overseeing NWA project development and implementations and reporting on the savings to the relevant parties. This may include monitoring contractors and customers to ensure that BTM NWAs are operating within the expected technical and economic parameters.

4. Regulatory filing and support – The successful bidder will support the Trust as it works with the NWA Coordinator in presenting and defending recommendations regarding more cost-effective BTM NWA solutions. This will include but not limited to creating regulatory filings, providing testimony, and responding to information requests.

2.4 Additional Sources of Information

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

TITLE	LOCATION (link)
Efficiency Maine Trust website	www.energymaine.com
Most recent Efficiency Maine Trust Annual Report	https://www.energymaine.com/about/library/reports/
Efficiency Maine Trust – Triennial Plan	https://www.energymaine.com/about/library/policies/
Previous program information (Evaluations, Reports, etc.)	https://www.energymaine.com/about/library/reports/
AESC 2018	https://www.synapse-energy.com/sites/default/files/AESC-2018-17-080.pdf
LD 1811	http://legislature.maine.gov/legis/bills/display_ps.asp?PID=1456&snum=129&paper=&paperId=l&ld=1181

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, and capacity for each task and describe related experience.

Task 1: Project Kickoff Meeting

The contractor, 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 project, 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 2: Technical Analysis

The scope of this RFP includes reviewing the proposed or contemplated T&D project(s) to assess the potential that DER resources may be likely to displace or defer the need for transmission and/or distribution system project. Once the opportunity has been confirmed by the NWA Coordinator, the successful bidder will advise the Trust on the appropriate technology categories that best address the specific capacity constraints in the defined area. This will include but is not limited to:

- Providing an analysis of the demographics for the proposed NWA area;
- Evaluating the potential for cost-effective NWA BTM measures that may be likely to displace or defer the need for the proposed transmission/distribution project;
- Identifying technology categories that may best address the specific capacity constraints in the defined area;
- Providing complete operating descriptions for each type of DER included that details the minimum and maximum level of load reduction available, the possible duration and specific hours of relief, the frequency at which each DER can be called upon reliably, and any constraints that would impact the availability of each resource.

Task 3. NWA Initiative Design

The successful bidder will have the experience, depth, and capacity to quickly determine and define the availability and reliability of appropriate NWA BTM resources. This will include but is not limited to:

- Defining the implementation requirements for the NWA BTM solutions;
- Determining the availability of resources and time to implement the solutions including the Trust's current programs and delivery teams;
- Conducting a benefit/cost analysis using, where applicable, prescribed methods and assumptions (M&As) provided by the Trust or the NWA Coordinator;
- Defining a forecasting and event notification process;
- Identifying and integrating with utility monitoring, communications and control systems;
- Assisting in identifying incentive levels;

-
- Developing Technical Reference Manual entries for cost effective NWA measures, as necessary;
 - Describing in detail how the proposed NWA measures integrate, or align with, existing programs; and,
 - Assisting with preparing one or more Requests for Proposal (RFP) for resource development and implementation.

Please describe your approach to designing the optimum BTM NWA solution for a given NWA opportunity. Provide a sample or samples of work products such as RFPs for distributed energy resources or other relevant project types that demonstrate the ability of the personnel who would be performing BTM NWA program design duties to carry out the required work successfully and effectively.

Task 4: NWA Project Oversight

The successful bidder will assist the Trust, on an as-needed basis, with NWA project oversight and monitoring. This may include but is not limited to:

- Providing comprehensive project oversight for multiple NWA projects;
- Providing schedule and budget oversight;
- Management of contractors;
- Assisting with data management and the data transfer process;
- Providing issue resolution; and,
- Reporting and closeout of project upon completion.

Task 5: Regulatory Filing and Support

The successful bidder will support the Trust by participating in regulatory filing activities including filing development, providing testimony, and responding to information requests as they pertain to an NWA initiative. This may include:

- Testimony pertaining to NWA resource analysis and deployment; and,
- Predictive measure persistence modeling.

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. Analysis of NWA opportunities as needed
3. TRM entries and documentation as needed
4. Written and oral regulatory testimony as needed

The contractor(s) must commit to completing all tasks within the time frames established in the proposal. The winning bidder must provide the Trust with electronic copies of all deliverables in Microsoft Office format or other appropriate format as approved by the Trust.

SECTION 4 – PROPOSAL REQUIREMENTS

4.1 Proposal Packaging and Physical Contents

Proposals must be delivered to the Trust in an envelope or package or by email, clearly labeled, “**Response to RFP EM-013-2019 Support Services for Non Wires Alternatives Initiatives**”.

The proposal submission must include:

- One signed, original document that is unbound and includes all sections, forms and appendices,
- 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.

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 (i.e., 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 (25 pages maximum)

The Trust understands that much of what it is asking for is still undefined and does not expect bidders to provide specific solutions to the tasks outlined in [Section 3 – Scope of Work](#). Instead, the Trust asks that bidders address the task requirements described below.

Task 1. Project Kickoff Meeting

Describe your approach, deliverables, and schedule for a project kickoff meeting.

Task 2: NWA Analysis

Describe your approach to analyzing NWA opportunities. In particular, describe your ability to analyze NWA opportunities with examples of experience with similar projects.

Describe your ability to quickly analyze each NWA opportunity with minimal advance notice. Include a contingency plan for situations where the presented workload may be challenging to complete in a short time frame.

Describe the personnel and resources that will be deployed to address a typical NWA opportunity.

Task 3: NWA Initiative Design

Describe your approach to designing the optimum NWA solution for a given NWA opportunity. Provide examples of experience with similar projects.

Describe your process to identifying and responding to any constraints that would impact the availability of each resource. These might include market conditions, frequency at which each DER can be called upon reliably, and the possible duration of relief.

Describe your approach to helping the Trust forecast measure uptake and program costs. Include a description of the economic modeling process used for determining the expected benefit and cost for each DER.

Describe the process for determining whether the proposed NWA solution should integrate with an existing Efficiency Maine program.

Task 4: NWA Project Oversight

Describe your approach to providing NWA project oversight. Provide examples of experience with similar projects.

Describe your ability to scale resources to match the workload. Describe the process for determining how management resources will be prioritized.

Describe your approach to resolving project issues with end users.

Task 5: Regulatory Filings and Support

Describe your experience with regulatory filings and support. Provide URL's to relevant documents in Appendix A.

7. 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.

c. Organizational Chart

Provide an organizational chart of the proposed team for the project. 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

The Trust recognizes the fluid nature of NWA projects and the difficulties associated with attempting to estimate the costs for the tasks outlined in Section 3. Provide a list of billable rates for team members that would be working to support the Trust on tasks outlined within this RFP and a description of how your organization can flexibly provide staffing to support the Trust on an as-needed basis.

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.

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.

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 <ul style="list-style-type: none"> a. Does the Statement of Work present a comprehensive, sound approach for accomplishing the tasks outlined within RFP? b. Is the Statement of Work thorough, specific and responsive to the tasks and details specified within the RFP? c. Does the proposal demonstrate a clear understanding of the Statement of Work and the Trust's expectations? 	30
2. Staff and Organization Qualifications <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 the services requested? c. How qualified are the proposed organizations (lead bidder and subcontractors) in terms of demonstrated experience and capacity to execute this type of service? 	30
3. Project Cost/Budget <ul style="list-style-type: none"> a. Are appropriate resources being devoted? b. Is the proposed budget consistent with the requested Statement of Work? c. How do the quoted rates compare to other comparable proposals? 	30
4. Overall Quality and Responsiveness <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? b. Does the proposal reflect and respond to the Trust's priorities? 	10
Total	100