



**EFFICIENCY MAINE TRUST
REQUEST FOR PROPOSALS FOR
LEVEL 2 SMART CHARGING
PILOT SUPPORT SERVICES**

RFP EM-009-2020

Date Issued: January 7, 2020

**Closing Date: February 14, 2020
3:00pm Eastern Time (US)**

TABLE OF CONTENTS

SECTION 1 – RFP INFORMATION AND INSTRUCTIONS 3
SECTION 2 – BACKGROUND INFORMATION..... 4
SECTION 3 – SCOPE OF WORK..... 6
SECTION 4 – GENERAL RESPONSIBILITIES AND REQUIREMENTS 9
SECTION 5 – PROPOSAL REQUIREMENTS..... 10
SECTION 6 – PROPOSAL EVALUATION AND AWARD 13
SECTION 7 – GENERAL CONDITIONS 15

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 Title and Purpose

RFP EM-009-2020 – Level 2 Smart Charging Pilot Support Services

Through this RFP, the Efficiency Maine Trust (the Trust) seeks one or more qualified bidders or bid teams to support the Trust in its goals of deploying a portfolio of smart Level 2 (240v) residential electric vehicle charging stations in the homes of recent EV Accelerator program participants to study the role that programed charging schedules and performance based incentives play in deferring charging behavior to off-peak hours.

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 of Activities

Event	Date/Deadline
RFP Issued	January 7, 2020
Question Period Closes	January 17, 2020
Responses to Questions Posted	January 22, 2020
Proposals Due at Efficiency Maine Trust Office	February 14, 2020 3:00 p.m. Eastern Time (US)
Anticipated Award Date	February 26, 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 Questions

Questions regarding this RFP must be submitted by email to the Designated Contact Person listed in section 1.2 prior to the close of the Question Period specified in section 1.3. The subject line of the email should be: RFP EM-009-2020 Questions. Responses to questions will be posted on the Trust’s website.

1.5 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 unless

requested by the Trust. Each bidder is responsible for ensuring the timely receipt of its proposal. Further details regarding proposal requirements are provided in Section 5 of this RFP.

1.6 Cost of Proposal Preparation

Costs incurred in the preparation of any proposal in response to this RFP are the sole responsibility of the bidder.

1.7 Anticipated Contract Term

The anticipated term of the contract is March 6, 2020 through August 31, 2021. The Trust is open to longer terms should the technology and/or strategy require more time to deliver benefits.

1.8 Anticipated Contract Budget

The total budget for the award(s) to be made under this solicitation is \$100,000 and may be allocated to a single award or among several awards. The individual contract(s) will be compensated on a fixed-price or time and materials not-to-exceed basis.

1.9 Contract Award

The Trust will notify all bidders of the contract award decision by email. The anticipated award date is specified in section 1.3. 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.

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>

SECTION 2 – BACKGROUND INFORMATION

2.1 Efficiency Maine Trust

Efficiency Maine is the independent administrator for programs to improve the efficiency of energy use and reduce greenhouse gases in Maine. The Trust does this primarily by delivering financial incentives on the purchase of high-efficiency equipment or changes to operations that help customers save electricity, natural gas and other fuels throughout the Maine economy. The Trust also promotes outreach about all manner of electrical end-uses, delivers education and training, maintains a website of consumer information and vendor registries, initiates pilot projects to explore the effectiveness of new energy technology and program designs, and conducts or manages measurement, verification and third-party evaluation of program activity. The Trust is a quasi-state agency governed by a Board of Trustees with oversight from the Maine Public Utilities Commission.

2.2 Innovation Program Background and Context

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

2.3 Program Goals, Objectives and Requirements in the Fourth Triennial Plan

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

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

2.4 Additional Sources of Information

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

TITLE	LOCATION (link)
Efficiency Maine Trust website	http://www.energymaine.com/
Most recent Efficiency Maine Trust Annual Report	https://www.energymaine.com/docs/FY19-Annual-Report_final.pdf
Efficiency Maine Innovation Program	https://www.energymaine.com/efficiency-maines-innovation-program/
Efficiency Maine Fourth Triennial Plan (TPIV)	http://energymaine.com/triennial-plan-iv/
Maine Public Utilities Commission - <i>Request for Proposals for Pilot Programs to Support Beneficial Electrification of the Transportation Sector</i>	https://www.maine.gov/mpuc/electricity/rfps/electrification-pilot/

SECTION 3 – SCOPE OF WORK

3.1 Overview and Objectives

As described in a recent proposal to the Maine Public Utilities Commission (MPUC), the Trust seeks to capitalize on its experience and expertise from administering initiatives associated with beneficial electrification of transportation, and to extend the progress being made in Maine with new learnings from a pilot program. The Trust’s pilot project will have three major elements:

- (1) smart networked EV chargers with default off-peak charging (Smart EV Chargers Group);
- (2) simulated time of use rates (Simulated Time-of-Use Group); and
- (3) a control group whose charging behavior will be measured through the analysis of the home’s advanced metering infrastructure (AMI) data.

Smart EV Chargers Group: Smart chargers are Level 2 electric vehicle supply equipment (EVSE) that are network connected, generally through WiFi, and can be controlled through either a web or phone interface. This gives both the customer and third parties the ability to collect data and set preferences remotely. For example, one preference could be to ensure that the car is fully charged at a certain time but to delay charging as much as possible. This RFP seeks a qualified bidder to work with original equipment manufacturers (OEMs) and the Trust’s existing contractor network to install and provide incentives for 50 Level 2 smart chargers at the homes of new or recent EV purchasers where there is not yet a Level 2 charging system in place. The Trust requires the successful bidder to work with the Trust’s existing [Qualified Partner network](#) to pre-program off-peak charging schedules on all installed units, deferring the charging start time to ISO-NE off-peak hours. The participants will always have the ability to override the pre-programmed schedule, effectively opting out of a load shift at any given time.

Simulated Time-of-Use Group: The Trust will provide incentives to a second group of 50 EV owners (i.e., no overlap between the two groups) to evaluate a simulated time-of-use scenario. The Trust will recruit EV owners from past participants in the EV Accelerator Program. The Trust expects this to be a pool of 300 to 500 vehicles that have participated in the EV Accelerator Program. The “Simulated Time-of-Use” customers will be presented the same measure incentive, equipment, and charging parameters as the “Smart EV Chargers” group with an additional, performance based quarterly financial incentive, to further encourage their off-peak use. The Trust is not proposing to change the rates of these customers or incorporate those changes into the utilities’ billing systems. Rather, it will simulate the benefit of off-peak time of use rates by offering an incentive. Customer’s will earn incentives each quarter by maintaining at least 90% of their charging off peak. Due to this, a robust dashboard capable of identifying charge times for each installed unit is required.

Control Group: The Trust is currently working with Convergence Data Analytics to establish a statewide charging behavior baseline from usage data. The study aims to understand the current charging behavior in Maine using the AMI data of all registered EVs in the state. At the time of this RFP, Convergence Data Analytics has verified the concept of disaggregating charging behavior from overall usage data but has not completed the process of securing all the AMI data of all registered EVs in the state. With this data the Trust will create a usage profile of EV charging absent any intervention by the Trust.

3.2 Primary Tasks

The primary purpose of this RFP (RFP EM-009-2020) is to procure the services of one or more qualified bidders to collaborate with smart Level 2 EVSE OEMs, the Trust’s qualified partner network, and the Trust’s Electric Vehicle Initiatives and Innovation teams to meet its goals outlined in its MPUC bid (Attachment D).

The Trust seeks one or more qualified bidders to partner with OEMs who **currently market** Level 2 EVSE that meets the following criteria:

- a. Is SAE J-1772 compliant, UL listed, and ENERGY STAR® certified;
- b. Has an interface that readily allows third parties (in this case the Trust), installers, or customers/end users to easily program a predetermined off-peak charging schedule, as established by the Trust;
- c. Has the ability to communicate with a central aggregator database or dashboard (proprietary to OEM or third-party) that would allow the Trust to manually set “allowable charging period time” parameters as needed and track charging behavior and energy usage in a format that can be provided to the Trust;
- d. Effectively communicates these changes to customers/end users and easily provides them with the opportunity to opt-out;
- e. Allows customers/end users the ability to easily override the predetermined off-peak charging schedule without the need for reprogramming the following day; and
- f. Tracks charging behavior and energy usage in a format that can be provided to the Trust.

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

- (1) Supply 50 Level 2 EVSE that meet the criteria outlined above at a reduced, incentivized cost, to pre-approved end customers;

- (2) Serve as a primary point of contact for customers interested in participating in the pilot project;
- (3) Work with the existing Efficiency Maine Qualified Partner network to ensure proper installation of the equipment; and
- (4) Ensure the networking functionality is properly working for all installed units and that the installed units are communicating with the central aggregator/database.

3.3 Proposal Task Descriptions

The bidder(s) must propose how they will perform the following tasks:

Task 1: Project Kickoff Meeting.

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

Task 1 Deliverables: Kickoff Meeting materials

Task 2: Equipment Acquisition

The bidder(s) must develop a detailed equipment acquisition plan that lists the specific manufacturer(s), equipment, and specifications of equipment that will be installed through the pilot.

Task 2 Deliverables: Signed Memorandum(s) of Understanding (MOU(s)) with equipment OEM(s) and database/aggregator (if relevant)

Task 3: Customer Outreach/Acquisition and Measure Deployment Plan

The bidder(s) must develop a detailed customer outreach/acquisition and measure deployment plan that describes the role that the bidder(s) will play in:

- (1) acquiring customers as a point of contact;
- (2) placing customers in contact with relevant qualified partners to ensure timely and complete installation of the chargers; and
- (3) implementing a quality assurance plan for the installation of the equipment.

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

Task 4: Project Management and Reporting.

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

- (1) Draft and final Pilot Implementation Plan that outlines the approach used by bidder(s) to implement their proposal.
- (2) Implement formal and informal communication protocols (e.g., status reports) throughout the contract period to maintain effective and timely communication with the Trust;
- (3) Prepare interim memos documenting key findings as they are reached; and
- (4) Prepare comprehensive draft and final reports on the pilot.

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

3.4 Project Deliverables

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

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

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

SECTION 4 – GENERAL RESPONSIBILITIES AND REQUIREMENTS

4.1 Contractor Responsibilities

The winning bidder will be responsible for adhering to the following requirements:

- **Customer Information Confidentiality.** All of the customer information in the Trust's possession is confidential. The winning bidder(s), its staff, and its subcontractors will be required to sign a nondisclosure agreement before any customer data is released to the contractor. See <http://legislature.maine.gov/statutes/35-A/title35-Asec10106.html> for additional information on related confidentiality restrictions.
- **Project Personnel.** In accordance with Standard Agreement, Rider B, Section 3, Provider Personnel (see Attachment B), no re-deployment or replacement of any Key Personnel may be made without the prior written consent of the Trust.
- **Call Center Coordination.** The winning bidder will be required to work cooperatively with the Trust's call center contractor and assist with call center training, monitoring, and support to ensure maximum customer satisfaction and cost-effective program delivery as needed.
- **Communication and Marketing Coordination.** The winning bidder will be required to work

cooperatively with the Trust’s Communications Division and any marketing contractors to ensure project marketing materials and messages conform with style guidelines and to ensure message coordination between various media outlets.

- **Database Management and Coordination.** The winning bidder will be required to collect and provide accurate pilot program data and customer information to the Trust.

4.2 Efficiency Maine Trust Responsibilities

The Trust, through its designated Program Manager for this contract, will oversee and manage all work undertaken by the winning bidder, including but not limited to:

- Providing project/pilot oversight and management;
- Reviewing, commenting on and approving all deliverables;
- Reviewing and approving, or rejecting, invoices;
- Providing guidance and direction regarding pilot implementation, initiatives and strategies;
- Reviewing pilot data; and
- Making available relevant work products and data that are the property of the Trust.

SECTION 5 – PROPOSAL REQUIREMENTS

5.1 Project Organization and Staffing Requirements

Proposals that include teaming arrangements must designate one party as the lead bidder. Personnel who are proposed shall be the actual contract performers. Bidders may not substitute personnel without prior written approval of the Trust.

5.2 Submittal Requirements

Proposals must be delivered to the Trust by the due date and time specified in section 1.3 of this RFP to the attention of the designated Contact Person specified in section 1.2. Proposals must be submitted in an email with the subject line of “**Response to RFP EM-009-2020 – Level 2 Smart Charging Pilot Support Services.**”

The submission must be a single, complete email with documents in PDF format plus a copy of Attachment C in Microsoft Excel format. This submission must be emailed to the designated point of contact specified in section 1.2 and must be received *no later* than the due date and time specified in section 1.3.

The Trust reserves the right to reject any proposal that does not meet these requirements.

5.3 Format Requirements

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

- Proposals must be typewritten, using a standard font (11 or 12 point);
- Each page must state the page number, the name of the bidder, and the RFP number;

- Each page must be 8.5"x11" and have one-inch margins;
- Proposals should avoid unnecessary attachments –any attachments beyond those sufficient to present a complete, comprehensive, and effective proposal will not be considered the evaluation of the proposal; and
- Proposals must adhere to prescribed page limits specified in section 5.4. Please note that each printed side counts as one (1) page.

The Trust reserves the right to reject any proposal that does not meet these requirements.

5.4 Content and Organization Requirements

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

1. Proposal Cover Sheet Form

- Include a completed, signed Proposal Cover Sheet Form (see Attachment A).
- If the proposal involves any subcontractors, provide a completed Team Commitment page.

2. Letter of Transmittal / Letters of Commitment

- 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.
- 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.

3. Table of Contents

4. 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.

5. Statement of Work (8 pages maximum)

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

6. Staffing, Management and Qualifications (5 pages maximum)

- **Overview:** Briefly describe the overall staffing plan and management approach to the pilot, including coordination with subcontractors where applicable.
- **Organizational chart:** Provide an organizational chart of the proposed team for the pilot. The chart should identify key team members, their project roles, illustrate relationships between the individual staff and the organizations (the Trust, the contractor and any subcontractors), and clearly indicate the primary point of contact for the Trust.
- **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 skills, qualifications, experience and expertise, including previous projects completed. (Resumes must be included in a separate appendix.)
- **Corporate qualifications:** Describe the corporate qualifications of the lead bidder, including brief descriptions of past experience with contracts of similar scope and size. Provide a client name and contract value for each and describe how the work is relevant to the current RFP. Provide the same information for each subcontractor.
- **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. Upon request, in order to provide the Trust with the ability to judge the bidder's financial capacity and capabilities to undertake and successfully complete the contract, the bidder may be required to submit two years of certified financial statements that include a balance sheet, income statement and statement of cash flow, and all applicable notes for the most recent calendar year or the bidder's most recent fiscal year. If certified financial statements are not available, the bidder should provide either a reviewed or compiled statement from an independent accountant setting forth the same information required for the certified financial statements, together with a certification from the Chief Executive Officer or the Chief Financial Officer, that the financial statements and other information included in the statements fairly present in all material respects the financial condition, results of operations and cash flows of the bidder as of, and for, the periods presented in the statements. In addition, the bidder may be required to submit a bank reference. The bidder may clearly mark financial documents submitted in connection with the proposal as "Confidential Financial Information."

7. Budget/Cost Proposal (2 pages maximum)

- **Budget:** Provide either a fixed-price or time and materials with a not-to-exceed cost bid for delivering the pilot.
- **Narrative:** Provide a detailed narrative explanation of the pilot cost proposal, including the total price, price for each task, incentive structure (if relevant), and any relevant assumptions.

- **Cost Form:** Provide a completed Project Proposal Cost Form (Attachment C) detailing the breakout of costs, including labor hours, hourly rates and costs for all personnel, including any subcontractors; other direct costs (including equipment related specifically to the pilot or incentives required to motivate customers to participate); and total costs. All related expenses must be included and itemized on this form; any costs not included on this form will be disallowed.

8. Appendices

- **Appendix A – References:** Provide a list of references for the lead bidder and any subcontractors included in the bid. At least three (3) 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.
- **Appendix B – Resumes:** Provide resumes of key project team members in an Appendix. Key project team members identified in the proposal must be dedicated to the proposed project at the level proposed. Any substitutions of key project team members must be approved by the Trust in writing.
- **Appendix C – Technical Specifications:** Provide technical documents associated with the EVSE (smart charger(s)) proposed in the bid.

SECTION 6 – PROPOSAL EVALUATION AND AWARD

Proposals that are received by the submission deadline and that meet the requirements established in the RFP will be reviewed and evaluated by a proposal review team. The Trust reserves the right to decide whether a proposal meets or does not meet 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.

6.1 Evaluation Criteria

In evaluating proposals submitted in response to this RFP, the proposal review team will use the following criteria, which are described in subsequent paragraphs:

Scoring Category	Maximum Points Available
1. Statement of Work	35
2. Staffing, Management and Qualifications	25
3. Project Cost/Budget	25
4. Overall Quality and Responsiveness	15
Total	100

1. Statement of Work

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

2. Staffing, Management and Qualifications

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

3. Project Budget/Cost

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

4. Overall Quality and Responsiveness

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

6.2 Contract Award

The Trust will notify all bidders of the contract award decision by email. The anticipated award date is specified in section 1.3. 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.

SECTION 7 – GENERAL CONDITIONS

7.1 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 any and all submissions in response to this RFP and to waive formalities if doing so is in the best interests of the Trust.

7.2 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.

7.3 Billing

For bids containing a time and material not-to-exceed proposal invoices submitted for work performed under the resulting contract shall be sufficiently specific to allow the Trust to evaluate charges billed in light of the tasks required. Each invoice must include a clear breakdown, by task where appropriate, indicating the individual personnel who performed work; the date, nature, and duration of work; and the rate(s) charged.

For bids containing a fixed-price proposal, the bidder is responsible for outlining specific milestones, payment amounts, and completion criteria to be included in the resulting contract. Disbursements will be made only once all specified completion criteria have been met.

7.4 Termination of Contract

Termination of the agreement by the Trust is governed by section 7 of the Standard Agreement (see Attachment B).

7.5 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>

7.6 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.