EFFICIENCY MAINE TRUST
REQUEST FOR PROPOSALS FOR

Consumer Products Program
RFP EM-007-2016

Date Issued: 2/11/16

Proposals Due: 3/14/16, 3:00pm Eastern Standard Time

TABLE OF CONTENTS

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 help design, implement, and report on a program to encourage Maine consumers to buy energy-efficient products such as lighting, appliances and electronics.

1.2 Designated Contact Person for this RFP

Andy Meyer, Program Manager
Efficiency Maine Trust
168 Capitol Street, Suite 1
Augusta, ME 04330-6856
Phone: (207) 213-4148
Email: andy.meyer@efficiencymaine.com

1.3 Schedule of Activities

Event	Date
RFP Issued	2/11/2016
Question Period Closes	2/22/2016
Responses to Questions Posted	2/25/2016
Proposals Due at Efficiency Maine Trust Office	3/14/2016 3pm EST
Anticipated Award Date	3/24/2016
Anticipated Contractor Start	7/1/2016 cutover

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: 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-007-2016 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, except for any clarifications requested of bidders by the Trust. Each bidder is responsible for ensuring timely receipt of its proposal.

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 July 1, 2016 through June 30, 2019, subject to annual review by the Trust.

1.8 Anticipated Contract Budget

The anticipated annual incentive and delivery budget for the program is anticipated to be roughly $12 million per year and is outlined in the Trust's proposed Triennial Plan III, which can be found here: http://emtplan.com/wp-content/uploads/2015/05/FY17-19-PLAN-APPENDICES-FINAL.pdf. The actual budget will be updated upon Public Utility Commission approval of the Triennial Plan III and after annual budget approvals by the Board of Trustees. Note that a portion of the authorized budgets will support program-related activities conducted by Trust staff or by separate contractors. The contract will be Time and Materials with a Not-to-Exceed maximum.

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 of service providers and grant recipients 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 Related Requests for Proposals

The Efficiency Maine Trust posts all Requests for Proposals at http://www.efficiencymaine.com/opportunities/.

Bidders are invited to respond to multiple requests. However, bidders must submit a separate, stand-alone proposal in response to each request for which the bidder wishes to be considered. Efficiency Maine may award one bidder more than one contract.

SECTION 2 – BACKGROUND INFORMATION

2.1 Efficiency Maine Trust

The Trust is the independent administrator for energy efficiency programs in Maine. The Trust's mission is to lower the cost and environmental impacts of energy in Maine by promoting cost-effective energy efficiency and alternative energy systems. The Trust does this primarily by delivering rebates on the purchase of high-efficiency lights and equipment to help customers save electricity, natural gas and heating fuels throughout the Maine economy. The Trust is governed by a stakeholder Board of Trustees with oversight from the Maine Public Utilities Commission.

Given the Trust's mission, the Trust generally seeks the following qualities in delivery teams and program designs:

- Market-Based – The Trust prefers market-based programs where customers select their own prescriptive measures and installer as opposed to programs where the program administrator models or decides the upgrade and manages the installer.
- Maximize Cost-Effectiveness – While other program goals and objectives may dictate specific measure mixes, the Trust prefers delivery teams that can find creative ways to achieve all program goals while maximizing cost-effectiveness using the Total Resource Cost test.
- Verifiable Savings – Innovative program delivery and measure offerings are valued by the Trust; however, only verifiable savings can be claimed. Bidders that can show a record of achieving verifiable savings and launching new measures with means of determining verifiable savings will have an advantage.
- Drive Demand, Not Supply – The Trust prefers to drive market demand rather than drive supply. For example, the Trust prefers to invest in the execution of a marketing plan and pay incentives for completed efficiency projects, rather than focus on programs that invest in training new installers or primarily increasing stock on shelves.
- Leverage Private Sector – The Trust makes every effort to support the private sector rather than compete with it. Therefore the Trust seeks delivery teams that have a record of collaborating with local organizations, supply chains, and contractors. For example, if there was a need for training, the Trust would prefer a delivery team that would market offerings from training organizations in Maine rather than a team that would develop its own courses.
- Core Competency of Customer Service – Program management is a function of Trust staff. Delivery teams may be directed to undertake many tasks of varying complexity such as consultation on program design and outreach. That said, the core competency of delivery teams must be adherence to highest levels of customer service, including fast and efficient processing of participant project documents, timely communications, and ability to work with contractors and program participants to achieve best outcomes.
- Third-Party Standards – The Trust typically uses third-party standards rather than developing its own. The Trust relies on organizations like ENERGY STAR®; Building Performance Institute (BPI); the Air Conditioning, Heating and Refrigeration Institute (AHRI); DesignLights Consortium (DLC);

and others. Therefore, delivery teams that are familiar with relevant third-party standards are preferred.

- Continuous Improvement – The Trust listens to stakeholders, monitors developments in energy efficiency technologies and programs, and modifies our programs as needed. Experience in continuous improvement is an advantage for a bidder.
- Pay for Energy Savings – The Trust places a high priority on investing funding on customer incentives for actual energy savings and minimizing costs of program delivery. Therefore, bidders are encouraged to avoid administratively intensive, behaviorally focused, complex programs, and incentives for activities that do not save energy.
- Simple Teams – While bidders are welcome to partner with other companies to form a team, unnecessary complexity in the team's organization would be considered a disadvantage. Simple teams with logical roles and experience working together are preferred.

2.2 Program Background and Context

The Trust started its Retail Lighting Program in 2002 and has added other products and channels over time. The program continually evolves with regard to measures, channels, incentive types, and incentive amounts. Marketing efforts varies from simple point-of-purchase signage to full-scale marketing plans. The Trust constantly searches for new ways to drive verifiable, cost-effective energy efficiency and customer satisfaction.

Our Draft Triennial Plan (p. 5-49, Section 5.5) goes into detail on the Trust's plans for the next three years regarding the program's objectives, opportunity, budget, goals, design, marketing, incentives, and quality control. Please refer to this draft plan for details. For additional context, following are highlights of the current program:

- Measures: CFLs, LEDs, heat pump water heaters, dehumidifiers, clothes washers and room air purifiers.
- Channels: retail stores, electrical distributors, plumbing distributors, food pantries and direct mail (of bulbs to participants in the appliance mail-in rebate program who request them).
- Incentive types:
    - mark downs where we pay incentives to retailers if they sell at a specific price based on a Memorandum of Understanding (MOU),
    - buy downs where we pay fixed incentives to the channel per an MOU, but let the channel set prices
    - instant rebates where the price is reduced by a fixed amount per measure at time of purchase and we reimburse the retailers
    - mail-in rebates where the customer pays full price and then mails us a rebate claim form
    - no-charge CFL distribution to food pantries who in turn distribute them at no cost to low income customers
- Marketing efforts:
    - Email and the efficiencymaine.com website
    - Google AdWords and display ads
    - YouTube pre-roll
    - Facebook and Twitter
    - phone campaigns and direct mail
    - community access cable
    - in-store videos and in-store demos
    - point-of-purchase signs and off-shelf merchandising

  - consumer shows, trade shows, and distributor events
  - partnering with utilities, non-profits, trade associations, town energy committees, fraternal organizations
- Approximate FY2016 program expenses: $11 million in incentives and $2.2 million in delivery, including:
  - $1.5 million dedicated team (8 field reps, 3 in-house program coordinators, 1 in-house program manager)
  - $100,000 shared contractor in-house experts available on an as-needed basis (regional manager of programs, program evaluation consultant, retailer relations lead, accounting)
  - $400,000 rebate processing center
  - $200,000 marketing support
- Approximate measure mix and budget:

	Measure	# of Units	Average Incentive (each)	Total Incentives	kwh/yr savings (each)	GWh/ yr total
1	Retail Energy Star LEDs	1,124,656	$ 4.69	$ 5,274,637	30	34
2	Retail CFLs	1,220,920	$ 1.73	$ 2,112,191	28	34
3	Heat Pump Water Heaters	3,344	$ 500.00	$ 1,672,199	1,687	6
4	Distributor Screw-in LEDs	208,485	$ 5.78	$ 1,205,043	143	30
5	Food Bank CFLs	221,064	$ 1.86	$ 411,180	26	6
6	Retail Value Line LEDs	120,000	$ 1.50	$ 180,000	28	3
7	Appliance CFL Shippers	35,150	$ 3.19	$ 112,130	26	1
8	Dehumidifier	2,550	$ 25.00	$ 63,750	109	0
9	Room Air Purifier	1,250	$ 50.00	$ 62,500	745	1
			TOTAL	$ 11,093,630		115

Lists of all the retailers and distributors are available on our website (efficiencymaine.com). The At Home Lighting Program page has links to our Find A Participating Retailer tool and lighting distributors list.

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

Fiscal Year (July-June)	Budget	Annual Savings Goal (MWh/yr)	Lifetime Benefit Goal (GWh)	B:C Ratio
2017	$12,900,009	81,251	$43,110,697	3.28
2018	$12,074,199	84,601	$41,973,981	3.53
2019	$11,641,528	91,215	$44,066,560	3.97

2.4 effRT Database

The Trust maintains an energy efficiency program tracking database named "effRT." The database stores the data for all of the Trust's active programs to ensure consistent and accurate reporting of energy savings.

Results from this program will need to be uploaded to effRT monthly or more frequently. Results include: number of each measure, rebate amount, date, channel (e.g., store, distributor, food pantry, etc.), and other details.

2.5 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	http://www.efficiencymaine.com/
Efficiency Maine Trust Annual Report (2015)	http://www.efficiencymaine.com/docs/2015-Efficiency-Maine-Annual-Report.pdf
Efficiency Maine Trust – Triennial Plan III (proposed)	http://emtplan.com/wp-content/uploads/2015/05/FY17-19-PLAN-APPENDICES-FINAL.pdf
Program webpage	Lighting Programs (retail and distributor) - http://www.efficiencymaine.com/at-home/retail-lighting-program/ Appliance Rebate Program - http://www.efficiencymaine.com/at-home/appliancerebate-program/ Heat Pump Water Heater Program - http://www.efficiencymaine.com/at-home/heat-pump-water-heater-program/
Recent Program Evaluations	2015 Retail Lighting Program Evaluation - http://www.efficiencymaine.com/docs/Efficiency-Maine-Retail-Lighting-Program-Evaluation-Report-2015.pdf 2014 Appliance Rebate Program Evaluation - http://www.efficiencymaine.com/docs/Efficiency-Maine-Appliance-Rebate-Program-Evaluation-Report-2014.pdf
Efficiency Maine Trust Residential Technical Resource Manual	http://www.efficiencymaine.com/docs/EMT-TRM_Retail_Residential_v2016_2.pdf

SECTION 3 – SCOPE OF WORK

3.1 Overview and Objectives

The Trust seeks a qualified bidder or team of bidders to provide complete program delivery services as required to deliver maximum verifiable, cost-effective energy efficiency and customer satisfaction with energy-efficient products.

3.2 Primary Program Tasks

The Trust will contract with the selected bidder(s) to deliver the program. This work includes, but is not limited to, the following primary tasks:

- Program Design – Provide suggestions to the Trust on ways to improve the program design to maximize sales of energy-efficient products, participants, customer satisfaction, and cost-effectiveness.
- Retailer/Distributor/Manufacturer/Installer Headquarters Support – Recruit retailers, distributors, manufacturers, and installers into the program as well as negotiate incentive levels and merchandising/promotion efforts in order to maximize energy savings.
- Field Support for Retailers, Distributors, Food Pantries, and Installers – Provide in-store support such as verifying Memorandum of Understanding (MOU) compliance, maximizing on-shelf point of purchase (POP) and off-shelf merchandising at store management level, ensuring inventory, staff training, customer support, in-store demos, and store management support. Installers (for example plumbers and electricians) may also benefit from field representatives. Field activities must be recorded and reported on a quarterly basis.
- In-bound Customer Support – Serve as backup to the Trust's Call Center to handle any program questions such as waiver requests for large purchases that exceed the 20-bulb-per-purchase limit, store requests to join program, rebate status questions, or anything else related to the program.
- Rebate Processing – Process all rebate claims (mail-in, instant, buy down, mark down, etc.) promptly, accurately, and traceably. Contractor should be able to report the status of all claims and handle any tax reporting (1099s, unclaimed rebates, etc.).
- Marketing (if required) –
  - Develop, maintain and execute a marketing plan to achieve program goals, as needed
  - Design, produce, and distribute marketing materials, as needed
- Quality Assurance – Maintain a closed-loop process that ensures the program is working as planned. This process should create and track actionable feedback.
- Forecasting, Tracking, and Reporting – Conduct weekly tracking and reporting all program results and forecasts as requested including:
  - Actual and forecasted sales compared to goal by product by channel in units and MWh/yr,
  - Contingency plans to ensure goal is achieved if initial plan not successful,
  - Financial reports showing the status of incentive payments and delivery costs compared to budget, and
  - Marketing activity compared to plan.

3.3 Proposal Task Descriptions

The bidder(s) are expected to propose how they will perform the following tasks:

Task 1 – Project Transition Plan
Describe how you plan to take over program management on July 1, 2016, while minimizing disruption to retailers, distributors, food pantries, installers, and customers. This plan should show action items, lead party, and due dates.

Task 2 – Program Design
Describe resources you have available to aid in program design optimization and share how you have helped other customers change their program designs to drive verifiable, cost-effective energy efficiency and customer satisfaction

Task 3 – Marketing
Describe your resources are for assisting with marketing plan development, marketing material design and creation, and marketing plan tracking. Share relevant samples.

Task 4 – Retailer/Distributor/Manufacturer/Installer Headquarters Support
Describe your experience, approach, and capabilities in this area.

Task 5 – Field Support
Describe the processes you have to manage a team of field representatives that can carry out the activities mentioned above. Describe any relevant field-team processes related to hiring, training, managing, supporting, and activity reporting.

Task 6 – In-bound customer support
Explain your processes to manage a team of in-bound-calls program representatives that can carry out the activities mentioned above. Describe any relevant processes for inside program support teams related to hiring, training, managing, supporting, and activity reporting.

Task 7 – Rebate Processing
Demonstrate your ability to process all rebate claims (mail-in, instant, buy down, mark down, etc.) promptly, accurately, and traceably. Describe how you know the status of all claims and handle any tax reporting (1099s, unclaimed rebates, etc.).

Task 8 – Quality Assurance
Describe your closed-loop process that ensures the program is working as planned. This process should create and track actionable feedback.

Task 9 – Forecasting, Tracking, and Reporting
Describe your ability to track and report weekly progress on investing funds and driving energy savings. Experience with forecasting results is valuable. The Trust will require that reports be submitted both in Excel (weekly) and via file transfer to our secure server (for our effRT database).

SECTION 4 – GENERAL RESPONSIBILITIES AND REQUIREMENTS

4.1 Contractor Responsibilities

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

- **Confidentiality.** All the Trust's customer information is confidential, and the winning bidder, 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.

- **Communication and Marketing Coordination.** The winning bidder will be required to work cooperatively with the Trust's Communications Division its marketing contractors to ensure program marketing materials and messages are in compliance with style guidelines and to ensure message coordination in various media outlets.

- **Database Management and Coordination.** The winning bidder will be required to collect, enter, and upload accurate program data and customer information into the Trust's database management system and work cooperatively with the Trust's database management contractor.

- **Research and Evaluation.** The winning bidder will be required to provide program data and information to support the Trust's research activities and evaluation, measurement and verification (EM&V) activities. This work will include, but is not limited to, support for ongoing EM&V activities and periodic program evaluations conducted by Trust staff and independent evaluation contractors. The winning bidder will be required to work cooperatively with the Trust's metrics team and evaluation contractors.

- **Program Transition.** The winning bidder must work with all preceding and succeeding contractors to accomplish a smooth transition. The transition must be performed in an organized and efficient manner with a minimum of disruption to customers, vendors, trade allies, contractors, and other energy-efficiency service partners.

- **Safety.** The contractor will be responsible for adhering to safety protocols and providing all necessary safety gear for site visits conducted as part of the program.

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 oversight and management;
- Reviewing, commenting on and approving all deliverables;
- Reviewing and approving, or rejecting, invoices;
- Providing guidance and direction regarding program implementation, initiatives and strategies;
- Reviewing program data and contractor-maintained tracking systems; and

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.

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 delivered in an envelope or package visibly labeled**, "Response to RFP EM-007-2016 – Consumer Products Program."**

The proposal submission must include:

- One (1) signed original document that is unbound and includes all sections, forms and appendices;
- Four (4) *bound* hard copies of the entire original, and
- One (1) electronic copy on CD-ROM of the complete proposal; files on the CD-ROM must be provided in Microsoft Office and/or PDF format and a copy of Attachment C must be provided in Microsoft Excel format.

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 have one-inch margins.
- Unnecessary attachments (i.e., any attachments beyond those sufficient to present a complete, comprehensive, and effective proposal) will not influence the evaluation of the proposal.

- Proposals must adhere to prescribed page limits specified in Section 5.4. Please note that each printed side counts as one 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, 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.
- 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 (10 pages maximum)

- ***Overview:*** Provide an overview of the proposed approach. Describe how the project is to be implemented to fulfill the objectives of the program, as specified by the Trust, and the requirements of the Scope of Work (section 3).
- ***Task by Task Program Implementation Plan:*** Specify the proposed Program Implementation Plan for accomplishing each individual task specified in the Scope of Work. Each task-specific plan should outline the approach to the task and specify the relevant methods and deliverables.

6. Staffing, Management and Qualifications (10 pages maximum)

- ***Overview:*** Briefly describe the overall staffing plan and management approach to the program, including coordination with subcontractors where applicable.
- ***Organizational chart:*** Provide an organizational chart of the proposed team for the program. The chart should identify key team members, their project roles, and 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 program evaluation 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 on 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.

7. Budget/Cost Proposal (5 pages maximum)

- ***Cost Information:*** Provide a Not-to-Exceed, Time-and-Materials budget for delivering the program. Include all costs, such as rebates, labor, subcontractor, and other costs. Separate rates by program year (July 1 – June 30). The winning bidder will be bound by the labor rates and not-to-exceed level specified in the contract.
- ***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; 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. Key project team members identified in the proposal must be dedicated to the proposed project at the level proposed.

- ***Appendix C – Evaluations and Reports:*** Provide examples of independent program evaluation reports or other relevant reports, published within the past 5 years, of programs (or services) delivered by the lead bidder that are similar in nature to the program (or services) requested in this RFP. Please provide URLs where the relevant evaluation reports may be accessed on-line; where on-line access is not possible, please provide electronic copies of the reports on the CD-ROM that is required as part of the proposal submission (section 5.2). In Appendix C, provide a list of the submitted reports that includes the report title, author/independent evaluator, publication date, and URL (or filename if provided on CD-ROM) for accessing the report.

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 is or is not 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.

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	30
2. Personnel and Organization Qualifications	30
3. Project Cost/Budget	30
4. Overall Quality and Responsiveness	10
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 program and the Trust's expectations for this specific program?
   - Does the Statement of Work reflect best practices in program delivery?

2. **Personnel and Organization Qualifications**
   - Is the proposed project 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 program?
   - How qualified are the proposed organizations (lead bidder and subcontractors) in terms

of demonstrated experience and capacity to execute this type of program?

3. **Project Budget/Cost**
    - Are appropriate resources being devoted to the individual tasks and sub-tasks?
    - How does the total bid compare to other comparable proposals?
    - Is the proposed budget consistent with the proposed Statement of Work?

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 program and the Trust's priorities for the 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.

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

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 charged.

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