



**EFFICIENCY MAINE TRUST
REQUEST FOR PROPOSALS FOR
MAINE ELECTRIC VEHICLE CHARGING– PHASE 1**

RFP EM-012-2018

Date Issued: July 31, 2018

Closing Date: October 2, 2018 3:00 p.m. local time

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Attachment A – Proposal Cover Sheet Form

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SECTION 1 – RFP INFORMATION AND INSTRUCTIONS

1.1 Title and Purpose

Title: RFP EM-012-2018 – MAINE ELECTRIC VEHICLE CHARGING – PHASE 1

Purpose: The Efficiency Maine Trust (the Trust) seeks a qualified bidder or team of bidders to provide electric vehicle (EV) charging stations and associated operations, maintenance, and management services for a seven-year period.

1.2 Designated Contact Person for this RFP

Jack Riordan
 Research and Data Analyst
 Efficiency Maine Trust
 168 Capitol Street, Suite 1
 Augusta, ME 04330-6856
 Phone: (207) 213-4147
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1.3 Schedule of Activities

Event	Date/Deadline
RFP Issued	July 31, 2018
Question Period Closes	August 21, 2018 (4:00 PM local time)
Responses to Questions Posted	August 28, 2018
Proposals Due at Efficiency Maine Trust Office	October 2, 2018 (3:00 PM local time)
Anticipated Award Date	October 16, 2018
Anticipated Contractor Start	October 30, 2018

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-012-2018 Questions. Responses to questions will be posted on the Trust's website at the link provided in Section 1.3, above.

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. 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 from the effective date of the contract until seven years from the in-service date of the last charging station installed under the contract..

1.8 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.

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

1.10 Related Requests for Proposals

The Trust anticipates issuing additional request for proposals and/or program opportunity notices for EV charging infrastructure and host sites across the state in support of Maine's Electric Vehicle Supply Equipment Initiative – Working Plan (as of July 2, 2018) which is posted on the Trust's website at:

<https://www.energymaine.com/at-work/electric-vehicle-supply-equipment-initiative/>.

SECTION 2 – BACKGROUND INFORMATION

2.1 Efficiency Maine Trust

The Trust 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 is a quasi-state agency governed by a Board of Trustees with oversight from the Maine Public Utilities Commission.

2.2 Background and Context

The Trust has been contracted to administer funds dedicated to developing an EV charging infrastructure in Maine. The initiative represents one component of Maine’s Beneficiary Mitigation Plan for the use of the funds from Volkswagen as part of a settlement of federal lawsuits (the VW Settlement funds). A critical goal in deploying these funds is to ensure the installation of EV fast-charging stations along priority corridors. The fast-charging stations are expected to provide quick, convenient, and reliable charging and allow an EV driver to travel along transportation corridors in Maine without experiencing range anxiety.

This RFP seeks to create the core of an EV fast-charging infrastructure in Maine through public-private partnerships. Using the funds from the VW Settlement, Efficiency Maine Trust seeks to award a contract to a single bidder (an individual or team) to build EV fast-charging stations at three selected service plazas on Interstate 95 (I-95) and in four priority locations on major state roads that connect I-95 to New Hampshire and Quebec along Maine’s western border. This RFP is a competitive solicitation for proposals for the development and operation of EV fast-charging stations along select routes of Maine’s transportation corridors.

Definitions:

- EV Corridor: A group of EV charging sites along a designated section of road and/or interstate highway for the purposes of this RFP.
- Designated Community: A municipality or other defined geographic area located along an EV Corridor that has been designated in the RFP as a community in or near which the RFP seeks to have an EV charging site developed and operated.
- Host Site: A specific geographic location on a specific property at which the property owner consents to host EV chargers accessible to the public along an EV Corridor.
- Charging Site: A place where an EV owner may charge their EV battery. A Charging Site is located at a Host Site, and may have multiple dispensers or plugs in order to allow more than one EV to charge at a time.
- Chargers/Charging Unit: An individual dispenser for use in delivering electricity to charge an EV battery. Each Charging Site in this RFP is required to have multiple dispensers meeting the specifications described herein.
- DCFC – A “Direct Current Fast Charger” (also referred to as a “DC Quick Charger” or “Level 3 Charger”), is a type of EV charger capable of rapidly charging EV batteries, using direct current,

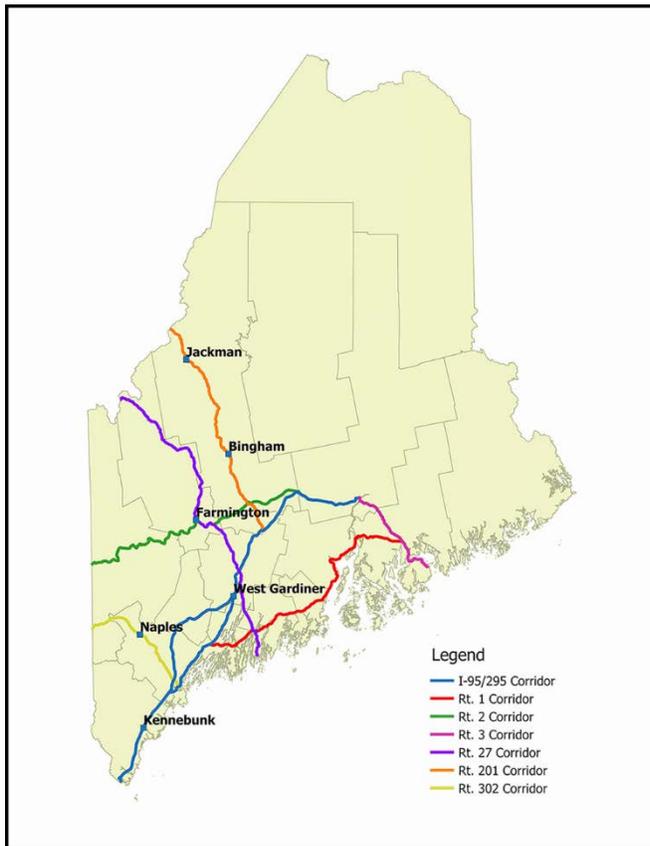
at 480 volts. DCFC typically are capable of providing a charge in 30 minutes or less that will enable travel of 60 miles or more.

2.3 Project Goals and Objectives

This solicitation seeks proposals that will complete the installation of DC Fast Charging electric vehicle charging stations, within 12 months of the effective date of the contract resulting from the award, at seven (7) locations along certain priority transportation corridors as indicated in Table 1, below. Three (3) of the host sites are predetermined, and four (4) of the host sites remain to be determined (TBD) and will need to be proposed by the bidder in the bid or subsequently during the contract period. The selected bidder will be expected to install, operate, and maintain the charging stations for not less than a seven-year period under the terms of a contract with the Trust.

Corridor and Site Locations

Figure 1



The EV charging stations solicited through this RFP will be located along the priority corridors in designated communities as shown in Figure 1.

As part of the outreach process, the Efficiency Maine Trust solicited input from state agencies, vendors, community officials and stakeholders to discuss the objectives of the initiative and the criteria for identifying optimal sites designated for EV charging. All were asked to submit written comments.

A result of the input was the establishment of priority corridors listed in the Legend in Figure 1. Along these corridors, the Trust has decided to seek through this, its “Phase 1” RFP, the development of seven charging locations in designated communities that are named in Figure 1 and further described in Table 1, below.¹

¹ As described in the Working Plan for Maine’s EVSE Initiative, a planned subsequent “Phase 2” RFP is intended to solicit proposals for the development and operation of additional DCFC stations in locations that will complement and “fill in” the network of EV fast chargers along these priority corridors such that the distance between fast chargers is 50 miles or less and so that important destinations -- including Bangor, Bar Harbor, Old Orchard Beach, and the borders with New Hampshire and Quebec -- can be comfortably reached. A planned subsequent “Phase 3” RFP is intended to solicit proposals to install Level 2 chargers.

Table 1: Charging Site Identification and Location

Charging Site #	Site	Road	Designated Community	DCFC Requirements
1	MTA Kennebunk Northbound	I-95	Kennebunk	Two 150 kW charging units
2	MTA Kennebunk Southbound	I-95	Kennebunk	Two 150 kW charging units
3	MTA W. Gardiner	I-95	W. Gardiner	Two 150 kW charging units
4	Naples – Site TBD	Rt. 302	Naples	Two 50 kW charging units
5	Farmington - Site TBD	Rt. 2	Farmington	Two 50 kW charging units
6	Bingham – Site TBD	Rt. 201	Bingham	Two 50 kW charging units
7	Jackman – Site TBD	Rt. 201	Jackman	Two 50 kW charging units

Applicants must bid to develop and serve all sites, as listed in Table 1 (above), together as a package and submit one cost proposal. Bidders also may propose additional options related to the sizes and quantity of charging dispensers at each station, which options must be accompanied by an explanation in the proposal narrative and in the Project Cost Proposal Form (Excel spreadsheet). Proposals to develop and operate less than the entire suite of sites listed in Table 1 will not be considered in this RFP.

The three Maine Turnpike (MTA) charging sites have been preselected. The EV charging stations funded through this RFP at the two Kennebunk sites will be located immediately adjacent to existing Tesla Supercharger installations. Bidders should note that 3-phase power already has been brought to the two Kennebunk station sites and there is recently installed conduit with capped stubs. Bidders should also note that the two Kennebunk sites are not subject to demand charges from the local utility.

Awards made under this RFP may only be used to cover costs that are eligible for the use of VW Trust Funds, which as it relates to this RFP are those costs “necessary for, and directly connected to, the acquisition, installation, operation and maintenance of new” EV charging stations available to the public. For charging stations located at non-government owned property sites, the award funds may be used to cover up to 80% of the eligible project costs. For charging stations installed on a government owned property, award funds may be used to cover up to 100% of eligible project costs. The subject corridor

consists of a mix of both government (MTA sites) and non-government owned sites. The successful bidder or bid team will be expected to contribute cost share towards this project.

Eligible Costs

The costs of the following items will be eligible for reimbursement using the funds administered under this RFP (subject to the cost share requirements and the proposed bid):

- DCFC units (one CHAdEMO and one SAE CCS J1772 on each DCFC), power conversion hardware, and associated equipment
- Level 2 chargers
- Utility upgrades such as transformers and extensions
- Other hard costs (concrete, conduit, wire, signage, etc.) directly related to the installation of the chargers
- Other equipment and non-labor project costs including charger design and engineering, permitting, and project management
- Shipping of equipment
- Personnel costs for site design, site preparation, and installation
- Equipment and materials necessary to construct and operate the proposed charging stations
- Maintenance and warranty costs for the charging equipment

Non-Eligible Costs

The costs of the following items or activities ARE NOT eligible for use of the VW funding from Efficiency Maine under this RFP, (i.e., if bidders elect to incur these costs, the costs will not be eligible for reimbursement from the funds awarded through this RFP):

- Paper studies or research projects (e.g., a study which assesses the cost and feasibility of electric vehicle charging station installations along certain regions/corridors)
- Surveys to determine interest in the installation of electric vehicle charging stations in a particular region/corridor
- Proposals for any type of vehicle demonstration or demonstrations of existing technologies for public outreach/education
- Purchase or rental of real-estate
- Other capital costs (e.g., construction of buildings, parking facilities, etc.)
- General maintenance (i.e., maintenance other than of the Supply Equipment)

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 EVSE website	https://www.energymaine.com/at-work/electric-vehicle-supply-equipment-initiative/
FY 2017 Efficiency Maine Trust Annual Report	https://www.energymaine.com/docs/FY2017-Annual-Report.pdf

Maine DOT Volkswagen Diesel Emissions Settlement Resources	http://maine.gov/mdot/vw/
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SECTION 3 – SCOPE OF WORK

3.1 Overview and Objectives

The Efficiency Maine Trust (the “Trust” or “Efficiency Maine”) seeks a qualified bidder or team of bidders to provide electric vehicle charging stations and associated operations, maintenance, and management services for a seven-year period.

3.2 PRIMARY PROJECT REQUIREMENTS AND TASKS

The Contractor selected through this RFP will be responsible for providing Electric Vehicle (EV) charging hardware, installation services, maintenance, network operations and ongoing provision of EV charging services to consumers at selected host sites along several priority corridors in Maine. The scope of work includes hardware, software and related equipment and infrastructure to install and operate DC fast-charging stations; site selection, design, engineering, construction and installation of the specified charging stations; network operations; and maintenance and support through the period of performance (October 30, 2018 through June 30, 2025). Task objectives, deliverables, timelines, technical specifications and requirements are outlined in each section.

The Trust will contract with the Contractor to deliver the project. This work includes, but is not limited to, the following primary tasks:

3.2.1 Install EV Charging Stations Meeting the Following Requirements:

1. Installation: The Contractor **is responsible for achieving completed installations at each EV Charging Site, to include:**
 - a. Obtaining all applicable local, state and federal permits required for installation and operation of the EV charging station;
 - b. Ensuring that all installation work as it pertains to site preparation, curbing, striping, signage, charging equipment, billing and networking systems, and electrical interconnections is installed:
 - i. consistent with the manufacturers’ specifications;
 - ii. consistent with the project design proposed in the bid;
 - iii. in accordance with all applicable local, state and federal zoning and code requirements; and
 - iv. is working properly;
 - c. Coordinating the installation activities with the Host Site, the electric utility, and any sub-contractors needed to complete the work.
2. Configuration: The charging stations will be configured as follows:
 - a. Two dedicated parking spaces;

- b. Two DC Fast Chargers (DCFC), one associated with and accessible from each dedicated parking space, where each DCFC is capable of rapid charging of a suitably equipped light-duty EV of not less than 60 miles of charge in 30 minutes, as specified in more detail below; and has both SAE CCS Combo standard and the CHAdeMO standard;
- c. At least one auxiliary Level 2 charger shall also be installed within reach of either of the two dedicated spaces but may alternatively be configured to reach an adjacent space where available;

3. Charging Equipment Requirements: The Contractor is responsible for ensuring that each DCFC dispenser:

- a. Is new, and unused (not refurbished / remanufactured); and of the most current technology available as of the proposal submission due date for this RFP;
- b. For sites 1, 2, and 3, is capable of providing at least 150 kW charging for a single vehicle;
- c. For sites 4, 5, 6, and 7, is capable of providing at least 50 kW for a single vehicle;
- d. Includes all cables, connectors, interfaces, documentation for all components, and any other items necessary for full operation at the Host Site;
- e. Is factory calibrated (as applicable) prior to, or during installation, in accordance with the Original Equipment Manufacturer (OEM) standards;
- f. Includes all standard manufacturer accessories;
- g. Is using the most current software version available as of the time it is installed;
- h. Has the ability to stop the flow of power when not in use; and should have over-current protection to prevent vehicles from drawing too much power;
- i. Is certified by the Underwriters Laboratories, Inc. (UL), or equivalent safety standard;
- j. Is able to withstand extreme weather conditions, including temperature extremes, flooding, ice, heavy snow or rain, and high winds and is protected from malfunctions due to condensation.
- k. Includes barriers or other configuration to prevent damage from equipment used for snow removal;
- l. Includes screen displays that are user friendly and easy to operate (display should be LCD, LED or equivalent, or better and should be readable in direct sunlight and at night);
- m. Is tamper-proof and deters vandalism;
- n. Incorporates a cord management system or method to minimize the potential for cable entanglement, user injury, or connector damage from lying on the ground, and comply with NEC articles 625 as it applies to cord management systems;
- o. Complies with all National Electrical Code and Federal Communications Commission regulations for safety and operation requirements; and,
- p. Is accessible to all members of the public, with no membership required to a specific network for access.

In addition, the bid should include a description of remote diagnostics and remote customer service support if applicable.

4. Networking: The DCFC must connect to a network via Wi-Fi, cellular or other connection using multiple carriers. Applicants must clearly state how potential network security concerns will be

prevented, addressed, and managed.

5. Signage: The Contractor may be asked to arrange and install signage with the Host Site and provide signage on the grounds of the Host Site as follows:
 - a. General Requirements: Signage complies with all applicable local, state, and/or federal laws, ordinances, regulations, and standards.
 - b. On-Site: Clearly identifies to an approaching driver from any ingress, that the Host Site has an EV Charging Station(s) and the location(s) of the EV Charging Station(s). On-site signage should identify parking is reserved for electric vehicles only.

6. Accessibility and Availability: For Charging Sites other than those located at Maine Turnpike plazas, the Contractor is responsible for recruiting suitable Host Sites for EV Charging Stations to be developed under this RFP that are:
 - a. Publicly accessible 24 hours per day, seven (7) days a week;
 - b. On a paved or hardscaped parking space that is clearly marked to designate the spaces as reserved for EV Charging Station parking;
 - c. Have dusk-to-dawn area lighting.
 - d. Include appropriate safety instructions for EV drivers regarding the proper use of the charging equipment.

3.2.2 Provide ongoing Operation and Maintenance and Customer Service Support:

1. Operation and Maintenance: The Contractor will:
 - a. Be responsible for ensuring payment of all operating and maintenance costs including, but not limited to, royalties, licenses, fees, taxes, revenue sharing, utilities, and electric power supply for the charging equipment and supporting elements, such as area lighting.
 - b. Operate and maintain each EV Charging Station for at least seven (7) years from the date the last of the seven Stations developed under this RFP becomes fully operational, in accordance with the terms of the contract resulting from this RFP.
 - c. Be responsible for ensuring the maintenance of the chargers including cables, ancillary equipment, and any awnings, canopies, shelters and information display kiosks for signage associated with the charging station. "Maintain" as used in this RFP shall mean "to provide all needed repairs or desired and approved alteration, as well as regular maintenance needed to ensure optimal performance and minimize downtime. Equipment shall be kept safe and presentable."
 - d. Address any issues such as, but not limited to, malfunctions and repairs. The Contractor must propose a plan to ensure that the equipment at each EV Charging Station is operational at least 97% of the time based on a week of 24 hours a day and 7 days (no more than 5 hours cumulative downtime in a 7-day period). It is the Contractor's responsibility to ensure the 97% uptime requirement is met. For significant or complex issues leading to extended downtime (such as vandalism), the Contractor shall:
 - i. Notify appropriate sources so drivers are aware including, but not limited to, website and application hosts, as appropriate.
 - ii. Inform the Trust via email within one business day to explain the situation and

management plan to mitigate the problem.

- e. Include a snow removal plan to ensure access during/after inclement weather.
- f. **Not**, during the period of operation, move an EV Charging Station to another Host Site location, sell or take an EV Charging Station out of service for any reason, without **prior written approval** from the Trust.

2. Customer Payment Options: Each EV Charging Station should:

- a. Be capable of supporting multiple point-of-sale methods, such as pay-per-use and subscription methods, including the ability to accept credit or debit cards without incurring excessive fees, inconvenience or delays versus other payment or access control methods; payment via mobile application; RFID; Smart Cards, etc.; and, as applicable, adhere to and demonstrate compliance with all relevant Payment Card Industry Compliance (PCI) standards.
- b. Have a point-of-sale and supporting network that uses an open protocol to allow subscribers of other EV charging system networks to access the EV Charging Station.

3. Data Capture Requirements: Each EV Charger should have network communications that, at a minimum, provide the following information about each charging transaction, at each charging location:

- a. Charging data such as date and time of usage (start and stop time) and accurate utilization rates;
- b. Total kWh and Total kW draw;
- c. Total dollar amount charged to the user;
- d. Station status and health in real time;
- e. Malfunction or operating error; and
- f. Full site level usage.

This information will be reported monthly to the Trust for the duration of the contract.

4. Customer Support Services: Provide customer service support as follows:

- a. Be available 24 hours a day, seven (7) days per week via a toll-free telephone number posted on or near the EV Charging Station, that is clearly visible to the customer.
- b. Provide customer support for the duration of the contract, with the ability to provide customer support/or extend after the completion of the contract.
- c. Resolve customer issues over the telephone, or dispatch service personnel to the Host Site as needed to resolve the issue.

3.2.3 Adhere to Contractor/Host Site Agreement – the Contractor will sign a host site agreement with the Host and the Trust:

The Contractor's Host Site agreement should, at a minimum, include:

- a. Seven (7) years of operation and maintenance of the EV Charging Station(s); and a continuity of operation and maintenance provision, beyond the initial seven (7) year period;
- b. A deposition plan for the EV Charging Station(s) in the event the Host Site agreement is terminated;
- c. A provision regarding the Contractor's legal right to own and operate the EV Charging Station(s) at the Host Site; and
- d. Be executed by all individuals who have the legal power and authority to enter into a Host Site agreement; and identify the name, title and capacity on behalf of the entity represented.

3.2.4 Future Proofing:

Where feasible, stations should be designed in a way that allows for future growth and expansion. Proposed designs should address any unique characteristics of the individual station sites and bidders are encouraged to provide innovative options.

3.3 Proposal Task Descriptions

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

Task 1: Site Selection, site requirements and installation

Bidders will be expected to be in frequent contact with the Trust as site selections are solidified. All final site location decisions must be approved in writing by the Trust.

If known at the time of the bid, for any or all of the four charging stations that will not be located on Maine Turnpike Authority property, describe the location and provide the address of each proposed station site along the corridor including proposed alternate sites as appropriate (e.g. primary site within a community along with any backup sites). For proposed identified sites, discuss why the station site was selected and the benefits it brings to EV drivers and Maine's network of DC fast-charging stations. Discuss nearby amenities and what is available to a driver at the site. Verify that each proposed site is within 1 mile of the applicable highway route number; if not provide a detailed rationale for alternate siting. If a proposed site is located on Route 302, Route 2, or Route 201 but is not in the community listed in Table 1, include a detailed justification for the alternate community location. Where available, for each station site including alternate sites, include an aerial photo of the proposed station site and a labeled site plan that identifies equipment, dedicated parking spaces, nearby amenities, and area for future expansion.

Where possible, proof of access to a proposed station site should be shown by evidence of property ownership, a lease, or a letter from the property owner indicating permission or commitment to good faith negotiations. Applicants should clearly describe any existing relationships or agreements that will facilitate access to the property.

Access to Sufficient Electrical Supply: Station sites must have access to existing, nearby utility power required to meet the minimum station specs. If available, include any documentation in regards to utility engagement, electrical capacity for each site, and proposed utility rates.

Station Specifications: Verify that all proposed stations and equipment meet the Station Specifications listed under *3.2.1 Install EV Charging Stations Meeting the Following Requirements*. Where specifications are met by equipment at each station's site (e.g. payment options), applicant may indicate, "applies to all station sites." For each proposed station site, include spec sheets for DCFC and related equipment. If a minimum specification is not met, applicant shall discuss why and explain how the equipment ensures a reliable and customer-focused charging experience

Future Proofing: Provide a description of "future proofing" design and construction for each station site as detailed under *3.2.4 Future Proofing*. Bidders are encouraged to include suggestions for innovative enhancements or changes where applicable. Estimated costs for future proofing each station site should be included on the applicable project cost form.

Task 2: Operations and Maintenance and Customer Service

Station Maintenance Plan: The applicant shall include a written plan for station maintenance as detailed under *3.2.2 Provide Ongoing Operation and Maintenance and Customer Service Support*. This plan shall include a description of available technical resources, qualifications of personnel who will assist during maintenance events, expected response times, and any specific, foreseen challenges/barriers to maintenance. The plan shall also provide a summary of planned maintenance activities by frequency and a communications strategy to keep the Trust informed about operations and maintenance activities. Where necessary, the plan should note any special maintenance requirements unique to an individual station.

Customer Service: Describe how each station site will meet the following Station requirements: 24-hour access to DCFC, area lighting and description of safety precautions; site and highway signage; payment options; and customer service.

Task 3: Host Site Agreement:

The applicant shall describe the process of developing the Host-Site Agreement with anticipated time frame. Discuss any terms and conditions unique to the identified sites. Include a sample Host Site Agreement as an appendix (Appendix C) to the proposal.

Task 4: Reporting

Applicants shall describe the typical reports to be generated throughout the duration of this contract including, but not limited to: site selection progress, construction and installation, operations and maintenance, data capture, and customer service. Include a frequency schedule for each report.

3.4 Project Deliverables

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

1. Installation and ownership of EV charging stations at seven charging sites;
2. Operations and maintenance and customer service for a seven-year term; and
3. Preparation and delivery of monthly reports.

The proposal must describe the planned timeline for completing all tasks identified in the RFP. The agreement between the Trust and the winning bidder will include milestones reflecting the timeline for implementation and the Contractor will be expected to complete the tasks within the time frame established in the signed agreement. The Contractor is responsible for providing the Trust with electronic copies of all reporting deliverables in Microsoft Office software format or other appropriate format approved by the Trust.

SECTION 4 – GENERAL RESPONSIBILITIES AND REQUIREMENTS

4.1 Contractor Responsibilities

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

- **Confidentiality.** Certain customer information in the possession of the Trust 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.
- **Project Personnel.** Contractor will provide written notice to the Trust of changes in the assignments and contact information of Key Personnel working on the project.
- **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 signage and messages are in compliance with style guidelines and to ensure message coordination.

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:

- Reviewing and approving all Host Site locations before final selection (where such approval shall not be unreasonably withheld);
- Providing project oversight and contract management;
- Reviewing and approving, or rejecting, invoices; and
- Reviewing project data and Contractor maintained tracking systems.

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-012-2018 – MAINE ELECTRIC VEHICLE CHARGING– PHASE 1.**”

The proposal submission must include:

- One (1) signed original document that is unbound and includes all sections, forms and appendices;
- Six (6) *bound* hard copies of the entire original, and
- One (1) electronic copy of the complete proposal provided on thumb drive or CD ROM; files 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 should state the page number, the name of the bidder, and the RFP number.
- Each page should 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 (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, 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 RFP, as specified by the Trust, and the requirements of the Scope of Work (Section 3).
- **Task by Task Project Implementation Plan:** Specify the proposed Project 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.
- **Schedule and Deliverables:** Provide a chart or outline detailing the proposed schedule for the project, including proposed timelines for each task and associated deliverables or reports. Applicants should note issues or conditions that will need to be resolved before the project can begin and highlight barriers that could delay the proposed timeline. All stations must be complete within 12 months of contract execution. Proposals with timelines beyond 12 months must provide a rationale for the extended timeline. Applicants are strongly encouraged to complete the project earlier than 12 months, if possible.
- **Optional Alternative Configuration:** If the bidder elects to propose an Optional Alternative Configuration for the number, size, site location or other characteristics of the EV charger(s) or operations at any of the charger sites, briefly include a description of the manner in which this alternative differs from the base requirements enumerated in the RFP and the pros and cons of the alternative.

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

- **Overview:** Briefly describe the overall staffing plan and management approach to the project, including coordination with subcontractors where applicable.
- **Organizational chart:** Provide an organizational chart of the proposed team for the project. 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 key staff members that are described in the bid, 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 similar 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. Prior EV charging station development experience (i.e. number of years, number of stations / sites developed, duties, locations, etc.) should be clearly indicated. Results from past projects should be highlighted.
- **Financial capability:** Describe the bid team's financial capacity to pay for the equipment investments, labor and other costs associated with the project and the lead bidder's prospects for financial sustainability generally. 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 documents containing business sensitive information and submitted in connection with the proposal as "Confidential Financial Information."

7. Budget/Cost Proposal (12 pages maximum)

- **Cost Information:** Provide a fixed-price bid for delivering the project.
- **Narrative:** Provide a detailed explanation of the project budget including a clear description including the quantity and specifications of DCFC units and associated equipment,

warranties for equipment, utility upgrades, hard costs like concrete and conduit, design and engineering, permitting, project management, and shipping of equipment. The narrative should clearly explain the applicant's cost share funds for the proposed project and where they come from. Applicants should indicate any other funding sources that will be used for this project and describe any plans to attract additional funding, if applicable. List all project-specific grant funds received or committed to date, whether from public or private sources, including all applications for funding pending with other entities.

- **Cost Forms:** Provide a completed Project Proposal Cost Form (Attachment C) detailing the breakout of costs, including: equipment and material costs; installation costs; operation costs (where applicable); costs for any subcontractors; project management (including host site recruitment); other direct costs; and total costs. All related expenses must be included and itemized on this form; any costs not included on this form may be disallowed for reimbursement through this contract. If a bidder elects to propose an Optional Alternative Configuration for the number, size, site location or other characteristics of the EV charger(s) or operations at any of the charger sites, so indicate on the Tab of the Cost Form for the impacted site and provide the revised cost reflecting the alternative in the designated rows and on the designated Summary Tab labeled "Optional Alternative Configuration."

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.
- **Appendix C – Host Site Agreement:** Provide a sample host site agreement as described in Section 3.3, Task 3.

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. Project Budget/Cost	60
2. Staffing, Management and Qualifications	15
3. Statement of Work and Timeline	15
4. Overall Quality and Responsiveness	10
Total	100

1. Project Budget/Cost

- Are appropriate resources being devoted to the individual tasks and sub-tasks?
- How does the total bid price compare to other comparable proposals?
- Is the proposed budget consistent with the proposed Statement of Work?
- Are the budget/cost forms filled out completely and accurately?
- Is the source, type, and amount of cost share funds appropriate?
- Is there adequate supporting data and documentation to validate budget veracity?

2. Staffing, Management and Qualifications

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

3. Statement of Work and Timeline

- Does the Statement of Work present a comprehensive, sound approach for accomplishing the requirements of this RFP?
- How soon does the bid propose to install and make operational the first station or stations, and how long will it be until all stations are operational?
- Is the proposed timeline sensible, reasonable and likely to be met?
- 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 project and the Trust's expectations for this specific initiative?
- Does the Statement of Work reflect best practices in project management and delivery?

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 project and the Trust's priorities for the project?
- Does the proposal include adequate supporting documentation and data to validate the veracity of the project as proposed?

6.2 Award

The Trust will notify all bidders of the 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 Contract appropriate to this RFP is provided as **Attachment B – Contract**. This is the standard document that will complete the agreement 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 for eligibility and consistency with the proposal and contract. Each invoice must include a clear breakdown, by task where appropriate, indicating the entity that performed work; the date and nature of the work. The Trust will negotiate with the winning bidder a mutually agreeable approach to pay out a portion of the award over the full period of the contract provided that uptime, maintenance, and customer service standards are being met.

7.4 Termination of Contract

Termination of the agreement by the Trust is governed by the Contract (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>