



**EFFICIENCY MAINE TRUST  
REQUEST FOR PROPOSALS (RFP) FOR  
CALL CENTER SERVICES**

**RFP EM-017-2024**

**Date Issued: January 12, 2024**

**Proposals Due: February 23, 2024, 11:59 p.m. Eastern Time (US)**

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**Separate attachments:**

Attachment A – Project Cost Proposal Form

Attachment B – Standard Agreement

Attachment C – Team Commitment Form

Attachment D – Confidentiality, Non-Disclosure and Protective Agreement

## SECTION 1 – RFP INFORMATION AND INSTRUCTIONS

### 1.1 Purpose

The Efficiency Maine Trust (the Trust) seeks a qualified contractor or team of contractors to provide call center services for three years starting 7/1/2024. The work is currently being handled by four full-time equivalent agents. In-state call centers are highly preferred.

### 1.2 Designated Contact Person for this RFP

Andy Meyer  
 Senior 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

	Milestone	Date/Deadline
1	RFP Issued	01/12/2024
2	Questions Due	01/26/2024
3	Responses to Questions Posted	02/02/2024
5	Proposals Due	02/23/2024, 11:59 p.m. Eastern Time (US)
6	Anticipated Award Date	03/08/2024
7	Anticipated Contractor Start	03/24/2024
8	Launch Date	07/01/2024

Schedule changes: The Trust reserves the right to modify this schedule at its discretion. Any changes or additional information regarding the RFP schedule and pre-bid activities, including responses to questions, will be posted on the RFP EM-017-2024 webpage at <https://www.efficiencymaine.com/opportunities/rfp-em-017-2024/>.

### 1.4 Anticipated Contract Term

The Trust anticipates awarding a single bidder or team of bidders up to three one-year contracts starting 7/1/2024.

### 1.5 Anticipated Contract Budget

The anticipated annual budget for this program is approximately \$300,000 per year. Each year the actual budget will be updated pursuant to approvals by the Trust's Board of Trustees and orders by Maine Public Utilities Commission related to the Trust's Triennial Plan.

The proposed budgets for the call center should cover all costs related to its operation under the awarded contract, including labor, office space, literature storage, technology, licensing, supplies, and printing. Excluded costs are brochure printing and postage.

### **1.6 Proposal Submittal Deadline**

All proposals must be submitted electronically via the online Submission Form on the RFP EM-017-2024 webpage (<https://www.efficiencymaine.com/opportunities/rfp-em-017-2024/>). Proposals must be received by the due date and time specified in section 1.3. Bidders will receive a time-stamped confirmation email when their proposals are submitted. (Note: There may be a delay of a few minutes between submission and this confirmation email). 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. The Trust encourages bidders to submit their proposals with sufficient time to account for any technological challenges (e.g., Internet disruptions).

### **1.7 Submitting Questions**

It is the responsibility of all bidders and other interested parties to examine the entire RFP and to seek clarification, in writing, if they do not understand any information or instructions. Questions regarding this RFP must be submitted by email to the Designated Contact Person listed in section 1.2 prior to the due date for questions noted above in section 1.3. The subject line of the email should be: "Call Center Services RFP". Responses to questions will be posted on <http://www.efficiencymaine.com/opportunities/rfp-em-017-2024>, as will all clarifications and amendments released in regard to the RFP. It is the responsibility of all interested parties to check this website periodically to obtain clarifications and amendments. Only those clarifications and amendments posted on this website are considered binding.

### **1.8 Proposal Confidentiality**

Bidders should be aware that information provided to the Trust is subject to the Maine Freedom of Access Act (FOAA), 1 M.R.S. §§ 401 et seq., unless there is a specific confidentiality exemption in the Efficiency Maine Trust Act, 35-A M.R.S. §10106. Bidders should assume that all information submitted in response to this RFP will be considered public records available for public inspection pursuant to the Maine FOAA following announcement of an award decision.

### **1.9 Contract Award**

The Trust will notify all bidders of the contract award decision by email. The Trust reserves the right to negotiate the final terms and conditions of the contract award with a winning bidder whose proposal is selected by the Trust, and to reject any winning bidder with whom the Trust cannot agree to terms and conditions meeting the Trust's needs, in the Trust's sole judgment. The Trust reserves the right to reject any proposal that does not meet these requirements.

### **1.10 Contracting Process**

The selection process is governed by the Efficiency Maine Trust Rule Chapter 1: Contracting Process for Service Providers and Grant Recipients, which can be found on the Trust's website: <http://www.efficiencymaine.com/docs/Chapter-1-Contracting-Process-for-Service-Providers-and-Grant-Recipients.pdf>.

### **1.11 RFP Process – Reservation of Rights**

The Trust reserves the right to cancel or extend the RFP process at any time, and to issue clarifications and amendments to the RFP. The Trust also reserves the right to reject noncompliant submissions in response

to this RFP. The Trust, in its sole discretion, reserves the right to recognize and waive minor informalities and irregularities found in proposals received in response to this RFP. Issuance of this RFP does not commit the Trust to make an award. The Trust will not pay any costs or expenses incurred by a bidder in connection with preparation of a proposal or response to this RFP.

### **1.12 Contract Agreement**

A copy of the Efficiency Maine Trust Standard Agreement appropriate to this RFP is provided as **Attachment B – Standard Agreement**. This is the standard document that will complete the agreement for services between the winning bidder and the Trust. The winning bidder and its agents and subcontractors will be required to execute a nondisclosure agreement, see **Attachment D -- Confidentiality, Non-Disclosure and Protective Agreement**. Certain information regarding a customer that has participated or that may participate in a Trust program is deemed confidential by the Efficiency Maine Trust Act. See <http://legislature.maine.gov/statutes/35-A/title35-Asec10106.html> for additional information on related confidentiality restrictions.

### **1.13 Request for Reconsideration**

An aggrieved person may request a hearing for reconsideration of a contract award decision by filing a written petition with the Executive Director of the Trust within 14 calendar days of the notification of the contract award. Each petition to reconsider must meet the requirements specified in Efficiency Maine Trust Rule Chapter 1, Contracting Process for Service Providers and Grant Recipients, Section 5(B), which can be found on the Trust's website under Documents and Services: <http://www.efficiencymaine.com/docs/Chapter-1-Contracting-Process-for-Service-Providers-and-Grant-Recipients.pdf>.

## SECTION 2 –BACKGROUND INFORMATION

### 2.1 Efficiency Maine Trust

The Efficiency Maine Trust (the Trust) is the independent, quasi-state agency established to plan and implement energy efficiency programs in Maine. Through its suite of nationally recognized programs, the Trust provides consumer information, marketing support, demonstration pilots, discounts, rebates, loans, and other initiatives to promote high-efficiency equipment and operations that help Maine’s homes, businesses, and institutions reduce their energy costs and lower their greenhouse gas emissions. The result is job growth, better grid reliability, improved energy independence, a stronger local economy, and critical progress toward meeting the State’s climate change goals. The Trust is governed by a Board of Trustees with oversight from the Maine Public Utilities Commission.

### 2.2 Background and Context

Efficiency Maine offers financial incentives, technical information, and directories of independent energy efficiency contractors to homeowners and businesses throughout Maine. Incentives are available for energy efficiency upgrades like insulation, space heating, water heating, lighting, appliances, pumps, and motors. These incentives are made through programs that are implemented by third-party companies (“program teams”) under contract to Efficiency Maine.

Customer outreach efforts include the Efficiency Maine website, social media, direct mail, email, advertising, trade shows, webinars, and more. Customers and contractors contact Efficiency Maine primarily via mail, email, and phone. Most of the phone calls, postal letters, and emails come to Efficiency Maine’s call center. The call center answers some questions using the Efficiency Maine website and manuals. Questions they cannot answer are forwarded on to Efficiency Maine staff or members of a program team. Currently, calls and email inquiries are fielded by four full-time equivalent call center agents (including a team lead).

Call center duties typically include:

1. Handling 150 inbound calls per day (some fully handled, most forwarded)
2. Handling 70 inbound emails per day (some fully handled, most forwarded)
3. Picking up 30 pieces of mail from the post office per day, scanning them, and emailing the scans to the appropriate person or team)
4. Making 500-700 outbound phone surveys calls per month
5. Stocking 50-100 different brochures and fulfilling 50 emailed brochure requests per month (picking, packing, mailing for next day delivery). A total of 7,000 pieces are typically mailed each month)
6. Stocking ~100 different retail signs (for store shelves, counter mats, banners, floor displays, etc. ) and fulfilling 20+ emailed field rep requests per month by picking, packing and mailing for next day delivery.
7. mailing out brochures and retail signage daily
8. testing Efficiency Maine website pages (calculators, vendor locator, etc.) weekly
9. maintaining a Do Not Contact list
10. print, assemble, and post direct mail campaigns (typically 50 letters/week)
11. collect and report customer and agent ideas for improvement (SOPs, web site, programs, etc.)
12. Reporting (daily, weekly, and quarterly).

**2.3 Additional Sources of Information**

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

<b>TITLE</b>	<b>LOCATION (link)</b>
Efficiency Maine Trust website	<a href="http://www.energymaine.com">www.energymaine.com</a>
Efficiency Maine Trust Annual Reports	<a href="https://www.energymaine.com/about/library/reports/">https://www.energymaine.com/about/library/reports/</a>
Efficiency Maine Trust – Triennial Plan	<a href="https://www.energymaine.com/about/library/policies/">https://www.energymaine.com/about/library/policies/</a>

## SECTION 3 –SCOPE OF WORK

Following is a task-by-task description of the work covered by this RFP. As explained in section 4.3, below, bid proposals must reflect the bidder’s plan, approach, capacity for each task and describe related experience.

### 3.1 Overview and Objectives

Under this solicitation, the Efficiency Maine Trust seeks a qualified contractor or team of contractors to provide call center services in support of our energy efficiency programs. The focus of the call center is to make it easy for callers to do business with Efficiency Maine by helping them navigate to our resources: programs, trade allies, technical information, staff, etc.

The call center will be required to leverage our website, manuals, and other sources of information to provide first call resolution whenever possible, and to forward callers to the appropriate backup team otherwise. When necessary, call center representatives should provide “hot” transfers. Efficiency Maine will provide training to the call center as needed.

The call center will be expected to document each call. The call center will also be expected to have capability to monitor and record calls for quality assurance, performance improvement, and program enhancement purposes.

The call center will also fulfill other customer service needs including responding to email inquiries, handling inbound postal mail, fulfilling literature requests, conducting phone surveys, and making invitation calls to Efficiency Maine events.

### 3.2 Tasks and Related Requirements

1. Inbound call support – The call center provides live, dedicated agents to support inbound calls from 8:00 a.m. to 5:00 p.m., Monday through Friday (except Maine State holidays) and voicemail all other hours. The call center must offer voicemail with greetings customized for business hours, after hours, and holidays.
2. Hot transfers – The call center must be able to “hot transfer” callers to backup specialists. For the purposes of this procurement, “hot transfer” is defined as bringing a specialist onto the call so that the customer, call center agent, and specialist are all on a three-way call for the introduction and then the call center agent exits, leaving the customer and specialist connected to one another.
3. Inbound email support – The call center provides inbound email support from 8:00 a.m. to 5:00 p.m., Monday through Friday (except Maine State holidays), using Efficiency Maine’s Outlook webmail. The call center will respond to all inbound emails by either answering or forwarding to the appropriate backup.
4. Outbound call campaigns – The call center provides outbound call services, as needed, such as surveys and invitations to Efficiency Maine events.
5. Literature fulfillment – The call center stocks literature provided by Efficiency Maine (20 to 30 different pieces) and mails to customers, contractors, or others, as requested. The call center must report the revision level of all literature in stock and manage the reordering of additional material from Efficiency Maine (at no cost to call center) to ensure availability.



6. US Mail – The call center must check an Efficiency-Maine-funded local US Post Office mailbox daily and respond to or forward all pieces.
7. Web testing – The call center must test specified portions of Efficiency Maine’s website weekly and alert Efficiency Maine of any errors.
8. Staffing – Efficiency Maine expects that the winning bidder will staff the call center with the equivalent of four full-time agents. Preference will be given to bidders who can provide a team of rotating agents so that more than four agents can be fully trained with at least two days per week of on-phone practice.
9. Agent Training – In addition to hiring representatives with appropriate professionalism and verbal communication skills, the call center will need to follow a clearly documented process for training, testing, and monitoring representatives. Successful bidders will demonstrate plans for on-going process improvement and training for employees. Efficiency Maine and its program team contractors will be available to provide training on content related to efficiency programs, but the call center will need to be able to provide other professional development training such as customer service, phone skills, and Microsoft Office.
10. Personnel Backup Plan – The call center must have a clear backup plan for maintaining a fully staffed team and covering for vacancies (e.g., due to vacation, illness, training, resignation, etc.). Preference will be given to bidders that can maintain the maximum trained and experienced agents while managing costs. For example, the call center could have agents that are dedicated to Efficiency Maine two to three days per week and can be reassigned to work up to 5 days per week if needed. We refer to these as “rotator agents.” At least two days per week per agent are needed in order to maintain necessary skill levels. All other things being equal, a proposal with six agents sharing 160 hours per week would be preferred over a proposal for four agents sharing 160 hours per week.
11. Service Levels – The call center must achieve these weekly service levels:
  - a. Answering time: 90% within 20 seconds,
  - b. Phone monitoring availability: 99% during business hours,
  - c. Phone system availability: 99.9% during business hours,
  - d. Respond to literature fulfillment requests: same business day; and
  - e. Respond to email requests: 2 business hours.
12. Expense management – The call center must manage expenses to stay within budget.
13. Reporting
  1. Recorded Calls
    - a. The call center must be able to securely retain all call recordings for six months and provide remote access to recorded calls to Efficiency Maine staff.
  2. Daily Reports – The call center must be able to provide daily reports, as requested, including the following topics:
    - a. Call campaign results
    - b. Phone survey results
  3. Weekly reports – The call center will provide weekly reports, as requested, including the following topics:
    - a. During business hours
      - i. Number of calls during open hours
      - ii. Number of calls answered within 20 seconds, during open hours
      - iii. % of calls answered within 20 seconds during open hours
      - iv. Number of calls not answered
      - v. % of calls, hung up, not answered, or went to voicemail, during open hours

- vi. Average call duration by min
  - vii. Number of inbound emails per day
  - viii. Number of inbound postal mail pieces received per day
  - ix. Number of outbound total dials per day
  - x. Number of completed surveys per day
  - xi. Number of outbound direct mail pieces sent
- b. Outside of business hours
    - i. Number of calls received
    - ii. Percent of calls received outside of business hours
    - iii. Prior 60 days total calls received
    - iv. Prior 60 days total calls received outside of business hours
  - c. Training status of each agent by training module (developed by Efficiency Maine)
  - d. Customer feedback including frequently asked questions
  - e. Suggestions from call center agent for program/process/website improvement
  - f. Efficiency Maine website testing results (tests specified by Efficiency Maine)
  - g. Speed-to-answer by program teams to call center forwarded calls
  - h. Literature levels and inventory revision levels (to ensure up-to-date)
  - i. Year-to-date actual expense and full year forecast compared to contract
4. Monthly Reports
- a. Number of calls by call reason (e.g., which energy efficiency program)
5. Quarterly Business Reviews – The Call Center will present a quarterly business review, sharing highlights and critical success factors of their work.
- a. Changes to processes or personnel
  - b. Continuous improvement efforts and results
  - c. Monthly inbound call volume trends and by reason for call
  - d. Monthly inbound email volume trends and drivers
  - e. Monthly inbound postal mail volume trends and drivers
  - f. Monthly service level vs Service Level Agreement
  - g. Monthly expenses and full year forecast compared to contract
  - h. Feedback from customers and agents.
14. Facilities, Security, and Infrastructure
1. Facility Efficiency Maine prefers that agents work together in a shared office where they can see and talk with one another.
  2. Literature Storage – The call center must have adequate facilities to store Efficiency Maine literature for fulfillment services.
  3. Emergency backup – The call center must have adequate facilities and back-up infrastructure to ensure continuous phone and computer services in the event of primary system failures. Agents must have the ability to work from home on days with dangerous weather.
  4. Location – Efficiency Maine strongly prefers a call center located near an Efficiency Maine Trust office (Augusta or Westbrook) in order to facilitate site visits.
  5. Noise – Background sound must be inaudible to callers.
  6. Computers – All call center representative workstations must have internet access, standard PC applications (e.g., Acrobat Reader and Microsoft Office), and access to color printing.
  7. Toll-Free Number – The call center must be able to receive calls directed from Efficiency Maine’s toll-free number.
  8. Security – The call center must provide industry-standard data security for Efficiency Maine information stored or accessed by call center systems and personnel. The call center must

abide by the Efficiency Maine Confidential Information Management Systems policies.

## SECTION 4 –PROPOSAL REQUIREMENTS

### 4.1 Proposal Submission

Proposals must be submitted electronically via the online Submission Form on the RFP EM-017-2024 webpage (<https://www.efficiencymaine.com/opportunities/rfp-em-017-2024/>.) All proposals must adhere to the instructions and format requirements outlined in this RFP, in the online Submission Form instructions, and in the written supplements and amendments issued by the Trust.

The online Submission Form will request the following documents:

- RFP response (see 4.3)
  - PDF format file named “Proposal\_Bidder\_Name\_RFP\_017\_2024”
- Attachment A - Project Cost Proposal Form
  - Excel format file named “Project\_Cost\_Bidder\_Name\_RFP\_017\_2024”
- Suggested redlines to Attachment B - Standard Agreement [if applicable]
  - Word format file named “Standard\_Agreement\_Bidder\_Name\_RFP\_017\_2024”
- Attachment C – Team Commitment Form [if proposal involves any subcontractors]
  - PDF format file named “Team\_Commitment\_Bidder\_Name\_RFP\_017\_2024”
- Any additional relevant documents (Word, PDF, or Excel format, as appropriate) [if applicable]

### 4.2 Format Requirements

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

- Proposals must be typewritten.
- Pages must be numbered.
- Unnecessary attachments (e.g., any attachments beyond those sufficient to present a complete, comprehensive, and effective proposal) will not be considered in the evaluation of the proposal.
- Proposals must adhere to prescribed page limits specified in this RFP. The Trust values concise proposals.

### 4.3 Content and Organization Requirements

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

1. **Table of Contents**
2. **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.

3. **Statement of Work** (10 pages maximum)

List the tasks outlined in section 3.2 above and briefly describe how you will accomplish the task, including examples of how you have completed similar work in the past. This section is a critical part of the proposal.

**4. Qualifications, Staffing and Management (10 pages maximum)**

**a. Corporate Qualifications**

Describe the bidding team's qualifications, including brief descriptions of past experience on contracts of similar scope and size. For each, provide the client name, the results achieved, and how the work is relevant to the current RFP.

**b. Individual Qualifications**

For each staff member that is bid on the project, please provide a brief narrative that includes a description of the individual's role on this project and a summary of his or her relevant education, training, experience and expertise. Include resumes in with other Additional Materials (see section 4.3(6)).

**c. Organizational Chart**

Provide an organizational chart of the proposed team for the program. The chart should identify key team members where identified, their roles, and relationships between staff and organizations (the Trust, the contractor, and any subcontractors). Clearly indicate the day-to-day primary point of contact for the Trust as well as the lead executive contact.

**d. Disclosures**

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. Disclose and provide details regarding any debarment or delisting from performance on federal government contracts or by the State of Maine within the three years preceding the date of submission of this proposal.

**5. Cost Proposal (use Attachment A - Project Cost Proposal Form provided)**

**a. Narrative**

Provide a brief narrative explanation of the project cost proposal, including the total not-to-exceed price, and an explanation of all relevant cost assumptions.

**b. Cost Form**

Provide a completed Project Cost Proposal Form (Attachment A) detailing the breakout of costs, including labor hours, hourly rates and costs for all personnel, including any subcontractors; other direct costs; and total costs in sufficient detail to allow assessment of the reasonableness of the basis for the costs proposed. All related expenses must be included and itemized on this form; any costs not included on this form will be disallowed. Provide separate rates by program year (July 1 – June 30) for FY2025, FY2026, and FY2027.

The winning bidder will be bound by the labor rates and not-to-exceed level specified in the contract and will be required to complete all tasks specific in that agreement without charges above the total agreement price.

## **6. Additional Materials**

### **a. References**

Provide a list of references for the lead bidder and any subcontractors included in the bid. At least three references must be provided for each organization included in the bid. For each reference, please provide current contact information (name, company, telephone number, and email address) and a brief description of the work conducted for the reference and its relevance to the current RFP. If evaluations of bidder's programs are available, please provide a list of them that includes the report title, author/independent evaluator, publication date, and URL (or filename if provided electronically) for accessing the report.

### **b. Resumes**

Provide resumes of key project team members. Key project team members identified in the proposal must be dedicated to the proposed project in the role proposed. Any substitutions of key project team members must be approved by the Trust.

## SECTION 5 –PROPOSAL EVALUATION CRITERIA

Proposals that meet the requirements established in the RFP will be evaluated by a proposal review team. The Trust reserves the right to decide whether a proposal is acceptable in terms of meeting the requirements of this RFP and to accept or reject any or all proposals received.

In evaluating proposals, the Trust reserves the right to take any of the following steps, with respect to either all of the proposals received or to a subset of proposals selected as superior to the others: (1) consult with prior clients on the performance of the bidder or of particular persons proposed for this bid; (2) schedule presentations or interviews with representatives of the bidder or persons proposed for the project; (3) conduct a review of past performance, including a review of reports, analyses, or other materials that would reflect the bidder's performance; and, (4) request additional data or supporting material.

### 5.1 Evaluation Criteria

In evaluating proposals submitted in response to this RFP, the proposal review team will use the following criteria:

Scoring Category	Maximum Points
<b>1. Statement of Work</b> <ul style="list-style-type: none"> <li>a. Does the Statement of Work present a comprehensive, sound approach for accomplishing the requirements of this RFP?</li> <li>b. Is the Statement of Work thorough, specific, and responsive to the requirements and details specified in the RFP?</li> <li>c. Does the proposal demonstrate a clear understanding of the Statement of Work and the Trust's expectations?</li> <li>d. Does the Statement of Work reflect best practices in delivering the specific services described in this RFP?</li> </ul>	30
<b>2. Staff and Organization Qualifications</b> <ul style="list-style-type: none"> <li>a. Is the proposed project staffing plan clear, appropriate, and realistic for the scope of the services requested?</li> <li>b. How qualified are the proposed personnel in terms of relevant skills and experience?</li> <li>c. How qualified are the proposed organizations (lead bidder and subcontractors) in terms of demonstrated experience and capacity to execute this type of program?</li> </ul>	30
<b>3. Project Cost/Budget</b> <ul style="list-style-type: none"> <li>a. Are appropriate resources being devoted?</li> <li>b. How does the total bid cost compare to other comparable proposals?</li> <li>c. Is the proposed budget consistent with the requested Statement of Work?</li> <li>d. How do the quoted rates compare to other comparable proposals?</li> </ul>	30
<b>4. Proximity to an Efficiency Maine Office</b> <ul style="list-style-type: none"> <li>a. How easy is it for Efficiency Maine staff to visit the call center?</li> </ul>	10
<b>Total</b>	<b>100</b>