EFFICIENCY MAINE TRUST
REQUEST FOR QUALIFICATIONS
TO PROVIDE VARIOUS
RESEARCH, EVALUATION, VERIFICATION AND
GRID MODERNIZATION SUPPORT SERVICES

RFQ EM-020-2025

Date Re-Issued: November 13, 2026

Submissions Due: November 30, 2026, 11:59 p.m. ET

SECTION 1 – RFQ INFORMATION AND INSTRUCTIONS

1.1 Purpose

Efficiency Maine Trust (the Trust) is soliciting services from qualified firms or individuals to provide research, evaluation, verification, and grid modernization support services related to programs that are aimed at improving the efficiency of energy use and reducing greenhouse gases in Maine. Interested parties are asked to present their qualifications related to one or more of the following services: economic modeling, program evaluation and verification, program design, interval data analysis, and grid modernization support. This RFQ will add to an existing pool of prequalified professionals to assist the Trust with discrete projects. Contractors who were prequalified in the last round need not reapply.

1.2 Designated Contact Person for this RFQ

Lauren Scott, Strategic Initiatives Manager
Efficiency Maine Trust
Email: lauren.scott@efficiencymaine.com

1.3 Schedule

Event	Date/Deadline
RFQ Re-Issued	November 13, 2026
Questions Due	November 18, 2026
Responses to Questions Posted	November 20, 2026
Submissions Due	**November 30, 2026, by 11:59 p.m. ET**
Anticipated Decision Date	December 4, 2026
Anticipated Contractor Start	Dependent on the project

Schedule changes: The Trust reserves the right to modify this schedule at its discretion. Any changes or additional information regarding the RFQ 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 Submittal Deadline

All proposals must be submitted electronically via the online Submission Form on the RFQ EM-020-2025 webpage (https://www.efficiencymaine.com/opportunities/rfq-em-020-2025/). 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).

1.5 Submitting Questions

It is the responsibility of all bidders and other interested parties to examine the entire RFQ and to seek clarification, in writing, if they do not understand any information or instructions. Questions regarding this RFQ must be submitted by email to the Designated Contact Person listed in section 1.2 prior to the due date for questions noted in section 1.3. The subject line of the email should be: "RFQ EM-020-2025 Questions." Responses to questions will be posted on http://www.efficiencymaine.com/opportunities/rfq-em-020-2025, as will all clarifications and amendments released in regard to the RFQ. 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.

1.6 Proposal Confidentiality

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 RFQ will be considered public records available for public inspection pursuant to the Maine FOAA following the announcement of an award decision.

1.7 Prequalification Term

The prequalification term for the initial prequalified pool was from July 1, 2025 through June 30, 2027. Contractors added will be prequalified from December 14, 2026 to June 30, 2027. Projects will be governed by individual scopes of work.

1.8 Anticipated Budget

Budgets will depend upon the nature and duration of the tasks required to complete the project. Contractor compensation will be based upon the bid hourly rates of the individual service provider(s) within the firm, plus approved expenses. Each project will be executed through a specific SOW on a time-and-materials basis with a not-to-exceed maximum value for each individual SOW. Where appropriate, fixed-price contracts may be negotiated. It is anticipated that individual SOW budgets for smaller projects will range from $2,000 to $50,000. Larger projects may be sent to a subset of the prequalified list of consultants for estimates and assigned based on experience, expertise, capacity, concept, availability, and cost.

1.9 Prequalification Decision

The Trust will notify all bidders by email of the individuals and companies that are selected as prequalified providers under this RFQ. The anticipated decision date is specified in section 1.3. The Trust reserves the right to negotiate the final terms and conditions with winning bidders whose packages are selected by the Trust, and to reject any winning bidders 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 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

Prequalified providers (contractors) may be asked to assist the Trust on a variety of research, evaluation, verification, and grid modernization support projects. The Trust will request support based on past experience or qualifications for the task, or request quotes for specific SOWs, or will notify a subset of the list of potential contractors about a project and select a contractor based on availability, proposed approach, and cost. Contractors selected under this RFQ have no guarantee of receiving any SOWs during the term of the contract; there is no obligation of the Trust to provide any equitable distribution of work.

1.11 Contract Agreements

A copy of the Efficiency Maine Trust Standard Agreement appropriate to this RFQ is provided as **Attachment B – Standard Agreement.**

Contractors and their 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.

1.12 Request for Reconsideration

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

SECTION 2 – BACKGROUND INFORMATION

2.1 Efficiency Maine Trust

The Trust is the independent, 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 RFQ Background

The Trust's current strategic plan – Triennial Plan VI (Fiscal Years 2026-2028) – covers seven main programs: (1) Commercial and Industrial (C&I) Custom; (2) C&I Prescriptive; (3) Retail and Distributor Initiatives; (4) Home Energy Savings Program; (5) Income-Eligible Home Programs; (6) Electric Vehicle Initiatives; and the (7) Demand Management Program, as well as several legislatively directed initiatives prioritizing beneficial electrification and non-wires alternative solutions.

The Triennial Plan also includes a robust Evaluation, Measurement, and Verification program with the following objectives:

- Provide data-driven research, analysis and reports to inform program design and delivery strategies, verify program results, and ensure ongoing program and organizational improvement;
- Meet statutory requirements for independent evaluations;
- Satisfy market rules for the sale of capacity resources; and
- Continuously improve the Trust's capacity to accurately track the status of efficiency projects, measure energy savings, generate reports, and maintain confidential treatment of customer information.

This RFQ will develop a pre-qualified pool of professionals to meet these objectives and perform analyses of the Trust's past, current and/or future program activities and related issues on an as-needed basis.

In addition to supporting its EM&V activities, the Trust seeks a pre-qualified pool of professionals to assist in its development and deployment of grid modernization projects utilizing the principles of transactive energy systems.

2.3 Additional Sources of Information

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

TITLE	LOCATION (link)
Efficiency Maine Trust website	www.efficiencymaine.com
Efficiency Maine Trust Annual Report	https://www.efficiencymaine.com/about/library/reports/
Efficiency Maine Trust – Triennial Plan VI	https://www.efficiencymaine.com/triennial-plan-vi/
Efficiency Maine Trust program evaluations and studies	https://www.efficiencymaine.com/about/library/reports/

SECTION 3 – POTENTIAL SERVICES AND ASSIGNMENTS

The Trust is seeking contractors to provide services across the following areas:

3.1 Economic Modeling

Examples include but are not limited to:

a. Quantifying achievable energy efficiency potential for a specific measure or set of measures;
b. Analyzing utility rate cases and cost recovery mechanisms;
c. Analyzing and commenting on utility forecasts;
d. Developing and/or analyzing energy price forecasts; and
e. Analyzing capital investment criteria by businesses and institutions considering energy efficiency investments.

3.2 Program Evaluation and Verification

The Trust will not be selecting vendors from this list to complete full evaluations of its programs but will be selecting vendors that can support discrete tasks relating to program evaluation including, but not limited to:

a. Designing and implementing surveys of free ridership and spillover;
b. Designing and implementing studies that meter the performance of equipment;
c. Reviewing program delivery processes;
d. Conducting inspections of completed projects; and
e. Analyzing program and/or market data to determine appropriate baselines for measures or categories of measures.

3.3 Program Design

Examples include but are not limited to:

a. Writing and editing program manuals;
b. Researching regional and national best practices; and
c. Researching and drafting new entries for the Trust's Technical Reference Manuals.

3.4 Interval Data Analysis

Examples include but are not limited to:

a. Disaggregating interval data to identify different loads; and
b. Conducting virtual energy audits.

3.5 Grid Modernization Support Services

Examples include but are not limited to:

a. Analyzing and commenting on utility plans to modernize their transmission and distribution systems, including but not limited to the implementation of an advanced distribution management system, a comprehensive real-time CYME Model accurate to the circuit level

and representative of field conditions and the infrastructure needed to supply such a model with data;

b. Utilizing grid planning information to assist the Trust in identifying circuits of interest to test the value of a transactive energy innovation pilot;
c. Analyzing interval data to prioritize various technologies, strategies, and interventions for customers participating in a transactive energy pilot;
d. Providing technical expertise on generator interconnection policies and practices. This includes but is not limited to the Maine Public Utilities Commission Chapter 324 rule, electric utilities' implementation of that rule, and ISO-NE's generator interconnection policies and practices.
e. Providing guidance on how transactive energy technologies can best be applied in a non-wires project; and
f. Providing testimony in support of the Trust's efforts in this space.

Contractors may bid to provide services in one or more of these areas. Contractors must indicate which services they are offering to provide under this bid and, to the extent their qualifications or rates vary among the specific services offered, must indicate the qualifications and rates that apply to each service.

SECTION 4 – GENERAL RESPONSIBILITIES AND REQUIREMENTS

4.1 Contractor Responsibilities

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

- **Confidentiality.** All the Trust's customer information, as well as customer information provided by utilities, 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 may be required to work cooperatively with the Trust's call center contractor.
- **Conflict of Interest.** In order to avoid conflicts of interest and ensure independence in the conduct of a program evaluation, no entity involved in: (1) any aspect of the design, implementation or delivery of the program being evaluated, (2) in the installation, technical assistance analysis, application or commissioning of a measure being evaluated, or (3) currently under contract with the Maine Public Utilities Commission for services related to Efficiency Maine Trust, may be involved in the conduct of an evaluation.

4.2 Efficiency Maine Trust Responsibilities

The Trust, through its designated manager for a given project or activity, 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 deliverables;
- Reviewing and approving, or rejecting, invoices;

- Providing guidance and direction regarding project implementation; and
- Making available relevant work products and data that are the property of the Trust.

SECTION 5 - PROPOSAL REQUIREMENTS

5.1 Team Organization and Staffing Requirements

Qualification packages that include teaming arrangements must designate one party as the lead bidder. Personnel who are proposed shall be the actual project performers. Bidders may not substitute personnel without prior written approval of the Trust. Other participating team members or sub-contractors must complete **Attachment C – Team Commitment Form**.

5.2 Submittal Requirements

Proposals must be submitted electronically via the online Submission Form on the RFQ EM-020-2025 webpage (https://www.efficiencymaine.com/opportunities/rfq-em-020-2025/.) All proposals must adhere to the instructions and format requirements outlined in this RFQ, 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:

- RFQ response
  - *PDF format file named "Proposal_Bidder_Name_RFQ_020-2025"*
- Attachment A - Project Cost Proposal Form
  - *Excel format file named "Project_Cost_Bidder_Name_RFQ_020-2025"*
- Suggested redlines to Attachment B - Standard Agreement [if applicable]
  - *Word format file named "Standard_Agreement_Bidder_Name_RFQ_020-2025"*
- Attachment C – Team Commitment Form [if proposal involves any subcontractors]
  - *PDF format file named "Team_Commitment_Bidder_Name_RFQ_020-2025"*
- Any additional relevant documents (Word, PDF, or Excel format, as appropriate) [if applicable]

5.3 Format Requirements

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

- Qualifications package 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 RFQ number.
- Unnecessary attachments (i.e., any attachments beyond those sufficient to present a complete, comprehensive, and effective qualifications package) will not be considered in the evaluation of the package.
- Qualifications package must adhere to prescribed page limits specified in section 5.4. The Trust values concise proposals.

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

5.4 Content and Organization Requirements

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

a. **Company Profile:** Provide an overview of the company including location, number of staff, services provided focusing on company, company experience, and company qualifications. (2 pages maximum per company on the team)
b. **Service Areas:** Indicate which of the following services apply to the bid as identified in section 3 of this RFQ. (1 page maximum)
c. **Individual Experience/Qualifications:** Identify the proposed personnel and their qualifications and capabilities to provide services within the relevant areas identified in section 3 of this RFQ. (1 page per person maximum)
d. **Management Approach:** Describe processes to ensure that assigned tasks will be completed on time, on budget, and with high quality and accuracy. (1 page maximum)
e. **Hourly Rates and Expenses:** Provide hourly rates and costs for all personnel, including any subcontractors, and other direct costs in an Excel-compatible format using the **Project Cost Proposal Form** template provided as **Attachment A** to this RFQ. All related expenses must be included and itemized by relevant service area described in section 3.
f. **References:** Provide names, addresses, email addresses, and telephone numbers of representatives of three current or recent clients for whom the firm has provided services related to those in this RFQ (3 references per company on the team).
g. **Project Examples:** Provide 3 to 5 project examples (web links or attachments) that highlight your qualifications.

SECTION 6 – QUALIFICATION PACKAGE EVALUATION

Proposals that meet the requirements established in the RFQ 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 RFQ 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.

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

Scoring Category	Maximum Points
1. Staff and Organization Qualifications **a.** Is the proposed project staffing plan clear, well-defined, appropriate and realistic for the scope of the services requested? **b.** How qualified are the proposed personnel in terms of skills, expertise and experience relevant to the service areas bid? **c.** How qualified are the proposed organizations (lead bidder and subcontractors) in terms of demonstrated experience and capacity to execute work in each service area?	45
2. Labor Rates and Costs **a.** Are appropriate resources being devoted? **b.** How do the quoted rates compare to other comparable proposals?	45
3. Overall Quality and Responsiveness **a.** What is the overall quality of the proposal submission, including: completeness, clarity, attention to detail, adherence to instructions and lack of errors? **b.** Does the proposal reflect and respond to the Trust's priorities? **c.** Does the proposal seek changes or exceptions?	10
Total	**100**

The Trust may at its discretion interview potential candidates or request additional information from select candidates. The Trust may contact references provided.

SECTION 7 – GENERAL CONDITIONS

7.1 Reservation of Rights

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

7.2 Contract Term and Compensation

A copy of the Efficiency Maine Trust Standard Agreement appropriate to larger projects under this RFQ is provided as **Attachment B – Standard Agreement.** This format is a standard document that will complete the agreement for services between the winning bidder and the Trust. Depending on the scope and duration of the project, the Trust may also use a shorter version of the standard agreement, subject to negotiation with the selected contractor.

The winning bidder and its agents and subcontractors will be required to execute a nondisclosure agreement as needed for an individual Scope of Work (SOW). 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.

The Trust will prequalify selected contractors for a duration of up to two years from the date of its execution. Contractor compensation will be based upon the bid hourly rates of the individual service provider(s) within the firm, plus approved expenses. All work assignments will be in the form of a SOW issued by the Trust. For a given SOW, the Trust shall have the right to request the services of specific individuals within the consultant's firm and shall have the right to competitively seek services of other pre-qualified contractors. Selected contractors have no guarantee of receiving any SOWs during the term of the contract; there is no obligation of the Trust to provide any equitable distribution of work.

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 an pre-qualification decision by filing a written petition with the Executive Director of the Trust within 14 calendar days of the notification of the prequalification decision. 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