



Memorandum

October 30, 2024

To: Board of Trustees

From: Michael Stoddard, Executive Director

Re: Sole-Source Contract for Staff Support Services – J. Vollrath

Proposed Motion

Move to authorize the Executive Director to amend a sole-source contract with Joanna Vollrath to add \$15,000 in capacity, for a total contract value not to exceed \$25,000 through FY2025.

Background

Joanna Vollrath was employed at the Efficiency Maine Trust from January 2022 until February 2024. During that time, she held the position of Communications Specialist and was directly responsible for a variety of communications activities, including advertising, postal and email mailings, event support, case study compilation, and blog writing for the Commercial & Industrial (C&I) Prescriptive Program, the residential (heat pump) programs, Electric Vehicle Initiatives, and the C&I Custom Program. Ms. Vollrath developed considerable experience with many of the Trust’s program’s protocols, procedures, and systems. She played a key role in training her replacement before she left. Unfortunately, the new hire resigned after six months to pursue another opportunity.

The Executive Director initiated a sole-source contract (\$10,000 value) with Ms. Volrath to help cover communications activities while we recruited a Communications Specialist. Her support has been excellent. A new employee will begin on November 4, 2024. Staff anticipates the need to continue using Ms. Volrath’s support for training the employee and assisting with communications tasks during the transition. Accordingly, Staff proposes to amend her contract to cover a maximum of \$25,000 through FY2025.

Section 3(B) of the Chapter 1 of the Efficiency Maine Trust Rules (Procurement Rule) indicates that the Trust:

may use a sole source procurement when: (1) the service provider has unique qualifications, resources, or experience; (2) there is not enough time to use a competitive bidding process; (3) the Trust finds that the program or required service would clearly benefit from a sole source procurement; or (4) the service provider is an identified partner in a grant proposal that has been submitted by and awarded to the Trust. The decision whether to use a sole source procurement for \$10,000 or less is delegated to the Executive Director of Efficiency Maine Trust. The decision to use a sole source procurement for more than \$10,000 will be made by the

Efficiency Maine Trust Board, or may be delegated on case-by-case basis by the Efficiency Maine Trust Board.

It is appropriate to employ the sole source authority in this situation. First, there currently is no other Staff member who can assume these communications duties. Second, unlike other potential service providers, Ms. Vollrath has extensive knowledge of the Trust's protocols, procedures, and systems used to support the range of programs and initiatives that the role encompasses and is able to manage and deliver quality work product on staff-level tasks with little or no training or daily guidance.