EFFICIENCY MAINE TRUST
REQUEST FOR PROPOSALS FOR
IMPACT EVALUATION OF THE HEAT PUMP WATER HEATER AND ELECTRONICALLY COMMUTATED MOTOR MEASURES

RFP EM-021-2024

Date Issued: May 8, 2024

Proposals Due: June 26, 2024, 11:59 p.m. Eastern Time (US)

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5.1 EVALUATION CRITERIA 15

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

Efficiency Maine Trust seeks a qualified bidder or team of bidders to plan and perform an independent impact evaluation of the heat pump water heater and electronically commutated motor circulator pump measures offered through the Trust's Retail and Distributor initiatives. The primary purpose of the evaluation is to quantify the energy savings and related impacts of the measures.

1.2 Designated Contact Person for this RFP

Laura Martel
Senior Research and Evaluation Manager
Efficiency Maine Trust
168 Capitol Street, Suite 1
Augusta, ME 04330-6856
Phone: (207) 213-4143
Email: laura.martel@efficiencymaine.com

1.3 Schedule

	Milestone	Date/Deadline
1	RFP Issued	05/08/2024
2	Questions Due	05/29/2024
3	Responses to Questions Posted	06/05/2024
4	Proposals Due	**06/26/2024, 11:59 p.m. Eastern Time (US)**
5	Anticipated Award Date	07/08/2024
6	Anticipated Contractor Start	07/22/2024

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-021-2024 webpage at https://www.efficiencymaine.com/opportunities/rfp-em-021-2024/.

1.4 Anticipated Contract Term

The Trust anticipates a period of performance from July 2024 through March 2026.

1.5 Anticipated Contract Budget

The Trust will develop a budget for this evaluation after reviewing submitted bids. Bidders are encouraged to propose the most cost-effective evaluation methods that meet the requirements laid out below. Proposals that include a base scope and optional tasks priced separately will be considered. The contract will be structured on a Time and Materials basis with a Not-To-Exceed maximum budget.

1.6 Proposal Submittal Deadline

All proposals must be submitted electronically via the online Submission Form on the RFP EM-021-2024 webpage (https://www.efficiencymaine.com/opportunities/rfp-em-021-2024/). 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: "RFP EM-021-2024 Questions".

Responses to questions will be posted on https://www.efficiencymaine.com/opportunities/rfp-em-021-2024/, 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 Non-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 the 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. 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.

1.14 Conflict of Interest

In order to avoid conflicts of interest and ensure independence in the conduct of the program evaluation, entities may not bid for this evaluation if they are 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.

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 Heat Pump Water Heater and Electrically Commutated Motor Measures Background

The Trust provides instant discounts at plumbing distributors for heat pump water heaters (HPWH) and electrically commutated motor (ECM) circulator pumps (Distributor Initiative). The Trust also provides instant discounts and mail-in rebates for heat pump water heaters sold through retail outlets (Retail Initiative).

2.3 Initiative Objectives

The design and administration of the Trust's Retail and Distributor Initiatives are meant to:

- Influence installers and end-users to purchase more energy efficient equipment;
- Reduce energy costs for end-users;
- Reduce total energy costs for electricity consumers in the State by reducing inefficient electricity use or increasing the efficiency with which electricity is used; and
- Create more favorable market conditions for the increased use of energy-efficient products and services.

2.4 Efficiency Maine Reporting and Tracking (effRT) and Measure Data

The Trust's programs are data-driven and their success hinges on the capacity to measure and verify the energy and cost savings derived from program participation. The primary tool that Efficiency Maine has developed for data management is known as the Efficiency Maine Reporting & Tracking System (effRT) database. The database platform manages the data for all of the Trust's active programs and ensures consistent and accurate estimates of energy savings. The effRT database is SQL-based with an online interface created and currently maintained with ASP.net tools. The winning bidder will be required to use the data already in effRT in evaluating the measures.

The following table includes the measures rebated during the evaluation period (FY2023). The measures were recorded under effRT programs based on the delivery channel (retail/distributor) and funding source (electric procurement/regional greenhouse gas initiative proceeds).

effRT Program Name	Measure Code	Measure Name	Measure Qty
Distributor - RGGI	HPWHD	Heat Pump Water Heater	294
Distributor Domestic Hot Water - Electric	HPWHD	Heat Pump Water Heater	5923

Appliance Instant	HPWHI	Heat Pump Water Heater Instant Discount	1599
Appliance Rebate	HPWHM	Heat Pump Water Heater - Mail-In	724
Retail - RGGI	HPWHM	Heat Pump Water Heater - Mail-In	90
Distributor HVAC – Electric	ECMHW	ECMHW Electronically Commuted Pump	14777

2.5 Utility Data

The Trust has the statutory authority to obtain customer-specific billing data from the electric and natural gas utilities. The process to obtain billing data from the utilities requires a customer account number. The quality and extent of billing data and advanced metering infrastructure (AMI)/electric interval data available and the time necessary to obtain it varies by utility. Proposals recommending the use of AMI data should note any software licensing fees associated with its analysis.

2.6 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 website	www.efficiencymaine.com
Efficiency Maine Trust Annual Reports	https://www.efficiencymaine.com/about/library/reports/
Efficiency Maine Trust – Triennial Plan	https://www.efficiencymaine.com/about/library/policies/
Incentive Webpages	https://www.efficiencymaine.com/ecm-circulator-pump-rebate/ https://www.efficiencymaine.com/at-home/heat-pump-water-heater-program/
Previous Program Evaluation (HPWH)	https://www.efficiencymaine.com/docs/WHEC_EMT_HPWH_Impact_Evaluation_Full_Report_with_Appendices_12_11_2019.pdf
ISO New England Manual for Measurement and Verification of Demand Reduction Value from Demand Resources (ISO-NE M-MVDR)	https://www.iso-ne.com/static-assets/documents/2018/10/manual_mvdr_measurement_and_verification_of_onpeak_and_seasonal_peak_demand_resources_rev07_20181004.pdf

SECTION 3 – SCOPE OF WORK

3.1 Overview and Objectives

The Trust seeks an independent evaluation of the Trust's Heat Pump Water Heater and Electrically Commutated Motor circulator pump measures. The evaluation is intended to fulfill the statutory requirements that the Trust:

(1) Arrange for an independent evaluation, at least once every 5 years, of each program that has an annual budget of more than $500,000, including an evaluation of the program's effectiveness in achieving goals specified in the law governing the Trust (35-A MRSA section 10104, subsection 10), and

(2) Monitor and evaluate the delivery of electric conservation programs and assess the cost-effectiveness of programs (35-A MRSA section 10110, subsection 2, paragraph F).

Two prior independent evaluations included heat pump water heaters published in 2020 and 2014. The present evaluation will cover the period from July 1, 2022, to June 30, 2023.

The primary objectives of the present evaluation are to quantify and verify energy and demand savings and analyze program cost-effectiveness. Consistent with these objectives, the overall evaluation project will include an impact evaluation and cost-benefit analysis which are further described in section 3.2. The contractor must provide a rigorous evaluation of the Program, consistent with available resources, and deliver timely information and results to the Trust.

3.2 Task by Task Description

The contractor is expected to perform the following tasks:

Task 1: Project Kickoff Meeting. The contractor, in consultation with the Trust, will organize and facilitate a Project Kickoff Meeting, either virtual or in-person, with relevant Trust staff. The purpose of the meeting is for the Trust and the contractor to establish a common understanding of the deliverables, the overall project schedule, and expectations regarding the conduct of the evaluation, and to provide the foundation for development of the Evaluation Plan. At a minimum, this meeting should include discussion of the proposed statement of work and schedule, initial data requests, and communication protocols and expectations.

Task 1 Deliverables: *Kickoff Meeting materials*

Task 2: Work Plan. The contractor will develop a detailed Work Plan that specifies the specific approach, schedule, implementation and quality assurance plan, for each task, sub-task and deliverable required under the project. The Evaluation Plan should follow the basic structure and format of the proposed Statement of Work, with revisions, modifications and additional detail incorporated as appropriate. For each primary data collection activity, the Evaluation Plan should specify the sample design and methodology, data collection methods and processes, confidence and relative precision goals, and quality assurance procedures.

Task 2 Deliverables: *Draft and Final Project Evaluation Plan.*

Task 3: Sampling and Data Collection. The contractor will draw samples and collect the necessary data to perform the: (1) impact evaluation, including measurement and verification of energy and demand savings for all measures and characterization of free ridership (cost-effective methods for determining spillover will also be considered); and (2) cost-benefit analysis. As discussed further in Section 4 of this RFP, measurement and verification of electric energy and demand savings conducted under this evaluation must comply with ISO New England's (ISO-NE) requirements for demand resources participating in the Forward Capacity Market (FCM). Consistent with the ISO-NE requirements, sampling should be designed to yield aggregate precision of at least +/- 10% at an 80% confidence level.

At a minimum, data collection efforts are expected to include:

- Review of data tracking system;
- Review of Technical Reference Manual measure entries;
- Literature review as applicable;
- Verification of measure installation;
- Field data collection and metering as necessary;
- Customer survey.

Task 3 Deliverables: *Draft and Final Data Collection Instruments and Protocols; Data Files.*

Task 4: Analysis. The contractor will analyze data as necessary to complete the impact evaluation and cost-benefit analysis.

Task 4a: Impact Evaluation.
The impact evaluation will examine the energy and demand savings of the efficiency measures. The contractor will:

- Design a sampling plan to obtain precision of +/- 10% or better at an 80% confidence level, consistent with the ISO-NE M-MVDR requirements;
- Determine the appropriate baseline against which to assess impacts;
- Determine verified gross energy and demand impacts by incentive type and measure type;
- Calculate in-service rates and gross realization rates for energy and demand savings;
- Explain differences and identify key drivers between tracked and verified savings by incentive type and measure type;
- Calculate energy period factors[1];
- Calculate peak coincidence factors[2] as applicable;

[1] Energy period factors are used to allocate the annual energy savings into one of the four energy periods. This allocation is performed in order to apply the appropriate avoided cost values in the calculation of program benefits. The four energy periods are defined as follows:

- **Winter Peak**: 7:00 AM to 11:00 PM on non-holiday weekdays during October through May (8 months).
- **Winter Off Peak**: 11:00 PM to 7:00 AM on non-holiday weekdays and all hours on weekends and holidays during October through May (8 months).
- **Summer Peak**: 7:00 AM to 11:00 PM on non-holiday weekdays during June through September (4 months).
- **Summer Off Peak**: 11:00 PM to 7:00 AM on non-holiday weekdays and all hours on weekends and holidays during June through September (4 months).

[2] Coincidence factors are used to determine the average electric demand savings during the summer and winter on-peak periods from maximum demand reductions when peak reductions are not determined directly. The on-peak demand periods are defined as follows:

- **Summer On-Peak**: 1:00 to 5:00 PM on non-holiday weekdays in June, July and August.
- **Winter On-Peak**: 5:00 to 7:00 PM on non-holiday weekdays in December and January.

- Identify potential Technical Reference Manual (TRM) updates to improve future gross savings estimates; and
- Determine net energy and demand savings attributable to the initiatives and compute net-to-gross ratios; provide estimates and analysis of free ridership and spillover.

Task 4b: Cost-Benefit Analysis.
The cost-benefit analysis will examine the cost-effectiveness of the initiatives. The analysis will be performed using the methodology and assumptions applicable to the period under evaluation. The Trust will provide an Excel-based implementation of the approved methodology and assumptions as well as provide access to the Cost Benefit Analysis Tool (CBAT) hosted in effRT. The cost-benefit analysis will meet the following objectives for measures installed under the initiatives during the evaluated period:

A. Verify benefit/cost calculations.
B. Determine for each measure type incentivized the following:
    a. Verified measure costs based on the costs of installed efficiency measures and determined baseline costs;
    b. Lifetime benefits of verified impacts (gross and net; positive and negative); and
    c. Measure level benefit/cost ratios (excluding program delivery and marketing costs) using prescribed methods.
C. Compile program delivery and marketing costs provided by the Trust.
D. Determine program level benefit/cost ratio using prescribed methods.
E. Identify key drivers of differences between the reported benefit/cost ratio and those calculated from verified impacts and costs.
F. Perform a sensitivity analysis considering evaluation uncertainty and alternative methodologies such as the following.
    a. Upper and lower bound of the verified impacts confidence interval.
    b. Upper and lower range of assessed measure costs.
    c. Upper and lower bound of assessed net-to-gross ratio.
    d. Alternate avoid cost data sets as provided by the Trust.

Task 4 Deliverables: *Interim Memos.*

Task 5: Project Management and Reporting. The contractor will manage all aspects of the evaluation project, including management of all tasks and sub-tasks, any subcontractors and submission of all deliverables. Management of the project should be designed to deliver high quality, on-time, on-budget services to the Trust. As part of this ongoing task, the contractor will, at a minimum:

- Implement formal and informal communication strategies throughout the contract period to maintain effective and timely communication with the Trust;
- Provide monthly status reports to the Trust that summarize the accomplishments during the prior month, the current month's activities, schedule and any issues or concerns that need to be addressed;
- Prepare interim memos documenting key findings as they are reached; and
- Prepare a comprehensive draft and final report on the evaluation.

Task 5 Deliverables: *Monthly Project Status Reports; Draft and Final Evaluation Reports; Draft and Final PowerPoint Presentation.*

3.3 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 will include, but are not limited to, the following:

1. Kickoff Meeting Materials
2. Draft and Final Evaluation Plan
3. Draft and Final Data Collection Instruments and Protocols
4. Original data files and final, cleaned evaluation data and analysis files resulting from the evaluation
5. Interim Memos on Key Findings
6. Draft and Final Verified Demand Impact Memo on ECM circulator pumps with Final due no later than **April 1, 2025**
7. Monthly Project Status Reports
8. Draft and Final PowerPoint Presentation of Project
9. Draft and Final Evaluation Report

The contractor must commit to completing all deliverables. Specific deadlines for each deliverable will be determined as part of the Evaluation Plan except as noted above. The contractor is responsible for providing the Trust with electronic copies of all deliverables in Microsoft Office software format or other appropriate editable format approved by the Trust.

SECTION 4 – PROPOSAL REQUIREMENTS

4.1 Proposal Submission

Proposals must be submitted electronically via the online Submission Form on the RFP EM-021-2024 webpage (https://www.efficiencymaine.com/opportunities/rfp-em-021-2024/). 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, including Appendices A-C (References, Resumes, Samples)
  - *PDF format file named "Proposal_Bidder_Name_RFP_021-2024"*
- Attachment A - Project Cost Proposal Form
  - *Excel format file named "Project_Cost_Bidder_Name_RFP_021-2024"*
- Suggested redlines to Attachment B - Standard Agreement [if applicable]
  - *Word format file named "Standard_Agreement_Bidder_Name_RFP_021-2024*
- Attachment C – Team Commitment Form [if proposal involves any subcontractors]
  - *PDF format file named "Team_Commitment_Bidder_Name_RFP_021-2024"*
- Attachment D – Confidentiality, Non-Disclosure and Protective Agreement
- 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 (13 pages maximum)**

   a. **Overview**

   Provide an overview of the proposed approach. Describe how the project is to be implemented to fulfill the objectives of the evaluation, as specified by the Trust, and the requirements of the Scope of Work (RFP Section 3).

   b. **Task by Task Evaluation Plan**

Specify the proposed evaluation plan for accomplishing each individual task and sub-task specified in the Scope of Work. Each task-specific evaluation plan should outline the approach to the task and specify the relevant data sources, sampling issues, data collection methods, analysis, and deliverables.

c. Schedule and Deliverables

Provide a chart or outline detailing the proposed schedule for the project, including proposed timelines for each task and sub-task and associated deliverables.

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 Appendix B.

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. Financial capability

Disclose and provide details regarding any bankruptcy petition (whether voluntary or involuntary), receivership, insolvency event, or similar adverse financial circumstance suffered or incurred by bidder (or any predecessor entity) within the three years preceding the date of submission of this proposal. Disclose and provide details regarding any litigation, arbitration, or administrative proceedings involving bidder within the three years preceding the date of submission of this proposal in which the amount claimed or adjudged against bidder exceeded $50,000.

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

Narrative and summary (1 page maximum): 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 and the cost of optional tasks.

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 not-to-exceed level proposed. All related expenses must be included and itemized on this form; any costs not included on this form will be disallowed.

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. Appendices

a. Appendix 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. Appendix B - Resumes

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

c. Appendix C – Samples

Please provide up to three samples (URLs or attachments) of recent work pertinent to the RFP. Do not send materials that are considered confidential.

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**
1. Statement of Work **a.** Does the Statement of Work present a comprehensive, sound approach for accomplishing the requirements of this RFP? **b.** Is the Statement of Work thorough, specific, and responsive to the requirements and details specified in the RFP? **c.** Does the proposal demonstrate a clear understanding of the Scope of Work and the Trust's expectations? **d.** Does the Statement of Work reflect best practices in delivering the specific scope described in this RFP?	30
2. 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 this project? **c.** How qualified are the proposed organizations (lead bidder and subcontractors) in terms of demonstrated experience and capacity to execute this type of project?	30
3. Project Cost/Budget **a.** Are appropriate resources being devoted? **b.** How does the total bid cost compare to other comparable proposals? **c.** Is the proposed budget consistent with the requested Scope of Work? **d.** How do the quoted rates compare to other comparable proposals?	30
4. 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**