



REQUEST FOR PROPOSALS (RFP) **Technical Assistance and Consultation Services**

INTRODUCTION

The American Recovery and Reinvestment Act of 2009 will provide over \$30 million for renewable energy and energy efficiency initiatives throughout the state of Vermont. These stimulus funds, combined with existing funds for renewable energy projects, will be administered through the Clean Energy Development Fund's (CEDF) programs to qualified individuals, businesses and organizations for approved projects. Since its inception in 2005, the CEDF has funded 84 projects with \$2.2m of low interest loans and \$13.2m in grants resulting in 9.6 megawatts of renewable capacity.

The Vermont Department of Public Service (DPS) is seeking the services of a qualified contractor with demonstrated experience in renewable energy and energy efficiency to provide technical support, technical evaluation and assistance for renewable energy and energy efficiency for the state's renewable energy program.

The contractor is expected to work with existing department staff, the CEDF fund manager and award recipients to ensure the successful implementation of energy projects. The contractor will be responsible for: technical review and evaluation of proposals; feasibility analysis; coordination with relevant stakeholders and project managers; permit review and guidance; development of grant agreements and contracts; due diligence; reporting, verification and presentations as necessary; municipal technical assistance.

Proposals are due by 4:00 P.M. on Friday, July 10, 2009 with the goal of awarding a contract as soon as possible. The contract period will run through July of 2011, or until otherwise notified. \$150,000 will be available for this contract.

Applicants mailing proposals should allow adequate time to ensure receipt of their proposal(s) by the deadline. Proposals are limited to 10 pages, with no less than an 11-point font and one inch margins. One original signed hard copy, three additional hard copies, and an electronic copy (which can be emailed or submitted on a CD) of the proposal must be delivered to Stephen Wark, Vermont Department of Public Service. **Both** electronic and hard copies must arrive before the deadline. Proposals and questions should be addressed to:

Stephen Wark
Vermont Department of Public Service
112 State Street
Montpelier, VT 05620-2601
Phone: (802) 828-4052
Email: Stephen.wark@state.vt.us

BACKGROUND

The American Recovery and Reinvestment Act (ARRA) will provide stimulus money to many different sectors, including state government. Specifically, Vermont will receive over \$700M in recovery and stimulus funds to accomplish several key goals:

1. To preserve and create jobs and promote economic recovery
2. To assist those most impacted by the recession
3. To provide investments needed to increase economic efficiency by spurring technological advances in science and health
4. To invest in transportation, environmental protection, and other infrastructure that will provide long-term economic benefits
5. To stabilize State and local government budgets, in order to minimize and avoid reductions in essential services and counterproductive state and local tax increases.

Vermont will receive federal assistance for energy efficiency and renewable energy to position our state to reduce the costs and consumption of energy through two separate US Department of Energy programs: the State Energy Program (SEP) "formula grant" and the Energy Efficiency and Conservation Block Grant (EECBG). Additionally, the US Department of Energy and other federal agencies or departments will release ARRA funds through several competitive grant processes.

Our state has strong capacity to realize the benefits of these federal programs because of the leadership we have exercised in the areas of efficiency and renewable energy. As one of one a few states that have decoupled electric efficiency from electricity distribution, Vermont invests and saves more, per capita, than any other state in the nation. Our efforts in renewable energy creation and net metering, through the Clean Energy Development Fund and Speed programs, provide us with a solid programmatic foundation to quickly and effectively distribute ARRA funds to achieve the mandated goals.

As a formula grant through the US Department of Energy, allocations through the State Energy Program are pre-determined by several factors. In the present case, Vermont will receive \$21,999,000.

The goals established for the State Energy Program (SEP) are:

1. Increase energy efficiency to reduce energy costs and consumption for consumers, businesses and government.
2. Reduce reliance on imported energy.
3. Improve the reliability of electricity and fuel supply and the delivery of energy services.
4. Reduce the impacts of energy production and use on the environment.

Vermont has several components of the State Energy Program, including the Clean Energy Development Fund, the Small Scale Renewable Grants and Loans Program, and the All-Fuels Efficiency Program.

The US Department of Energy will also provide \$9.5M in funding to Vermont through a program known as the Energy Efficiency and Conservation Block Grant (EECBG) Program. The Program's purposes are to stimulate the economy and to create and retain jobs in the energy sector.

The funds are to be awarded to projects that promote and enhance the objectives of the Act, especially job creation, preservation and economic recovery, in an expeditious manner.

As this is a “formula grant” through the US Department of Energy, allocations to the state of Vermont pre-determined by several factors, including population.

The EECBG instructions require the funds allocated to the State to be divided as follows:

- 40 percent to the State Energy Program, or \$3.8M
- 60 percent to the counties, towns and cities that did not receive a formula allocation, or \$5.7M, for approved activities

SCOPE OF SERVICES

The contractor is expected to provide the following services, as directed:

- Engineering review and technical feasibility analysis of project proposals;
- Project oversight and management;
- Evaluation, reporting, compliance monitoring and verification;
- Support to Municipal Technical Assistance Program;
- Due diligence of proposals;
- Development and review of documents to include but not limited to: grant agreements, contracts; completion of Department of Energy forms and reports; technical designs; evaluation and reports;
- Presentations;
- Permit and legal review;
- Site visits and evaluation;
- Support of award recipients;
- Duties will require travel to/from sites, work within office, and strong capacity to work individually as well as harmoniously with others;
- Excellent written, verbal, organization skills;
- Contractor must have a flexible attitude, ability to work in a variety of settings and conditions;
- Development of RFPs, identifying funding opportunities, issuing contracts as needed;
- Publicity & Informational Outreach (creation of web tools, correspondence with interested parties, publicity creation)
- CEDF Large-Scale and Small-Scale Grants/Incentives Programs (review of proposals; setting up grant agreements)

INFORMATION REQUIRED FROM APPLICANTS

Proposals should be prepared simply and economically, providing a straight forward, concise description of the applicant's ability to meet the requirements of the RFP. Fancy bindings, colored displays, promotional materials, and so forth, are not desired. Emphasis should be on completeness and clarity of content. Information in the applicant's proposal which should be held confidential must be clearly marked as confidential and comply with an exemption from public inspection as per 1 V.S.A. § 317(c).

Proposals should be no longer than 5 pages, with no less than an 11 point font and one inch margins (resumes **do not** count toward the 5 page limit) and must include at minimum the following information:

Identification of Organization

State the full name and address of the organization that will perform, or assist in performing, the work.

Authorized Negotiators

Include the names and phone numbers of personnel authorized to negotiate the proposed contract with the State. One original hard copy must be signed by a duly authorized representative of the party (or parties) submitting the proposal.

Prior Experience Disclosure

Prior experience in renewable energy and energy efficiency, technical review is important to the selection of a contractor. Proposals must include a description of the applicant's experience in each of these areas.

Personnel

Each organization submitting a proposal under this RFP shall have demonstrable knowledge, skills and experience as it relates to the required work. The proposal must identify the person that will be employed in the proposed work by skill and qualifications. Subcontractors will not be accepted for this proposal.

Service Plan

Describe in narrative form the plan for accomplishing the work. Indicate the number of hours allocated to each task. Describe quality assurance measures that will be put in place to make certain that services will be delivered in an effective, efficient, timely, and competent manner.

Budget Considerations

Applicants must submit a proposed budget for services described in this RFP and include narrative explanations.

The following cost elements should be included:

- Personnel (position, rate, hours)
- Travel (mileage must be billed at the state rate of 58.5 cents/mile)
- Supplies & Materials
- Other (specify)
- Total Direct Costs
- Indirect Costs
- BUDGET TOTAL

Additional Information and Comments

Include any other information that is believed to be pertinent, but not specifically requested elsewhere in this RFP.

SELECTION CRITERIA

The DPS will evaluate all proposals received based upon reasonableness of cost, completeness and quality of the proposal, qualifications of the individuals proposed to perform the work, relevance of previous experience, and any other criteria it deems relevant. Acceptance or rejection of any or all proposals will be determined by the exercise of the Department's sole discretion.

All proposals are subject to an evaluation by the DPS and/or non-departmental reviewers. The DPS reserves the right (but in no way is obligated) to interview the top prospective candidates to aid in the selection process.

The award of the contract will be made based on the following criteria:

1. Experience & Qualifications
 - Experience in renewable energy and efficiency systems; system feasibility analysis.
 - Experience with permitting.
 - Experience in proposal evaluation and review.
 - Project management experience.
 - Grant agreements, contract
 - Education and certifications.
2. Services
 - Consultation services are well defined.
 - Quality assurance measures are well defined.
 - Ability to provide services quickly once funding is available.
3. Budget
 - Budget line items and amounts are sufficiently described and justified.
 - Administrative costs are reasonable and competitive.

GENERAL TERMS AND CONDITIONS

1. The DPS reserves the right to reject any and all proposals received as a result of this RFP for any reason, to waive minor irregularities in any proposals received, and to negotiate with any party in any manner deemed necessary to best serve the interests of the State.
2. The DPS shall not be responsible for any costs incurred by any party in preparation of any proposal submitted in response to this RFP.
3. The DPS reserves the right to amend or cancel this RFP at any time if the best interest of the State requires such action.
4. News releases pertaining to this RFP, contract award, or the project shall not be made without prior written approval from the DPS.
5. The DPS will pay for actual work performed and expenses incurred under this project up to the specified contract amount. Specific payment provisions will be arrived at upon mutual

agreement of the parties. All payments will require the submission of an itemized billing of work performed to date in sufficient detail to justify payment.

6. All parties submitting proposals shall be Equal Opportunity Employers. During the duration of the performance of this contract, the contractor will be expected to comply with all federal, state and local laws respecting non-discrimination in employment.
7. All deliverables submitted by the selected contractor shall become the property of the State.
8. The selected contractor(s) shall agree to grant to the State a nonexclusive, irrevocable license to reproduce, translate, publish, use, and dispose of all material developed as a result of the contract.
9. Before commencing work contractor(s) must provide certificates of insurance to show that the following minimum coverages are in effect. It is the responsibility of the contractor to maintain current certificates of insurance on file with the State through the term of the grant.

Workers' Compensation: With respect to all operations performed, the Recipient shall carry workers' compensation insurance in accordance with the laws of the State of Vermont.

General Liability and Property Damage: With respect to all operations performed under the grant, the Recipient shall carry general liability insurance having all major divisions of coverage including, but not limited to:

Premises - Operations
Products and completed Operations
Personal Injury Liability
Contractual Liability

The policy shall be on an occurrence form and limits shall not be less than:

\$1,000,000 Per Occurrence
\$1,000,000 General Aggregate
\$1,000,000 Products / completed products aggregate
\$ 50,000 Fire Legal Liability

Automotive Liability: The Recipient shall carry automotive liability insurance covering all owned, non-owned and hired vehicles, used in connection with the Grant. Limits of coverage shall not be less than: \$1,000,000 Combined single limit

No warranty is made that the coverages and limits listed herein are adequate to cover and protect the interests of the Recipient for the Recipient's operations. These are solely minimums that have been set to protect the interests of the State.

10. The DPS assumes no liability in any fashion with respect to this RFP or any matters related thereto. All prospective contractors and their subcontractors or successors, by their participation in the RFP process, shall indemnify, save and hold the DPS and its employees and agents free and harmless from all lawsuits, causes of action, debts, rights, judgments, claims, demands, damages, losses and expenses or whatsoever kind in law or

equity, known and unknown, foreseen and unforeseen, arising from or out of this RFP and/or any subsequent acts related thereto, including but not limited to the recommendation of a contractor and any action brought by an unsuccessful applicant.