



**Vermont School Heating Assistance with Renewables &
Efficiency (SHARE) Program**

REQUEST FOR PROPOSALS

Date Issued: July 31, 2023

Questions Due on or before: August 21, 2023

Initial Application Due: September 8, 2023

Comprehensive Application Due: October 6, 2023

➤ *Emergency application will be accepted before the due dates listed above for HVAC systems damaged by the July 10-11, 2023 floods. Those interested in making an emergency application should Contact the Vermont Public Service Department as soon as possible.*

Vermont Public Service Department

112 State Street

Montpelier, Vermont 05620-2601

(802) 828-2811

TTY/TTD (VT): 1-800-734-8390

Internet: <http://publicservice.vermont.gov/>

OVERVIEW

In the fiscal year 2024 Vermont state budget the Public Service Department was appropriated \$2,000,000 for its the School Heating Assistance with Renewables and Efficiency Program (SHARE)¹. The appropriation was made to provide financial and technical assistance to Title I eligible schools² to repair or renovate existing woodchip or pellet heating systems or to install new woodchip or pellet heating systems.

Schools that experienced flood damage to existing wood heating systems or that want to replace flood damaged systems with a wood system can make an emergency application for funding outside of the due dates and requirements of this RFP. Please contact Christopher Heine at the Public Service Department if your school is interested in making an emergency application: Christopher.Heine@vermont.gov

This request for proposals (RFP) is intended to assist schools through additional funding to the PSD's SHARE program which has provided schools with grants, funded by the American Rescue Plan Act (ARPA), in 2022 and early 2023.

The Public Service Department (PSD or Department) requests proposals from qualifying Vermont elementary and secondary schools for system repairs, replacements, improvements, or new installations of wood-fueled heating systems, that support those schools' ability to provide education, decrease energy costs, reduce air emissions, and reduce the use of fossil fuels.

Projects eligible to be supported through this RFP shall:

1. Assist with school energy cost reduction through wood fueled heating system repairs, improvements, and/or the installation of new high efficiency pellet or woodchip boilers/furnaces.
2. Maximize the displacement of fossil fuel use for space heating.
3. Decrease the particulate emissions and inefficient use of wood fuel.

An applicant may only submit one proposal per qualifying school; however an applicant may be named on more than one proposal if the additional proposal(s) are for other qualifying schools. Additionally, a sub-contractor is allowed to be on more than one proposal. Proposals must be for qualifying schools located in Vermont. All incentives must be for the benefit of Vermont residents. Projects receiving grant awards and the subcontractors (subrecipients) retained by the contractor for the project(s) must complete the project(s) no later than December 31, 2025. **Funds cannot be used for projects under construction or for equipment purchases made prior to a grant agreement being executed.**

PROGRAM SUMMARY:

¹ Sec. B.1103 (c) of Act 78:

<https://legislature.vermont.gov/Documents/2024/Docs/ACTS/ACT078/ACT078%20As%20Enacted.pdf>

² Title I, Part A (Title I) of the Elementary and Secondary Education Act, as amended by the Every Student Succeeds Act provides financial assistance to local educational agencies and schools with high numbers or high percentages of children from low-income families to help ensure that all children meet challenging state academic standards.

Award Description	
Recipient Eligibility:	Vermont Elementary or Secondary School with Title I eligibility or that receive Title I funding assistance
Funding Type:	Program Grant
Total Amount available: <i>Maximum Grant:</i> <i>Minimum Grant:</i>	\$2,000,000 \$250,000 \$20,000
Total Project Cost Share Required from recipients:	Tiered based on poverty level of the school: 10%, 25%, or 45%
Eligible Projects:	<ul style="list-style-type: none"> • Installations of new advanced wood-fueled heating systems. • Wood pellet/chip storage systems and heating system controls. • Repairs and upgrades of existing wood-fueled heating systems (including control and emission components).
New Heating Systems Allowed:	Pellet fueled heating systems (boilers, furnaces) that are: Highly efficient ($\geq 85\%$) Low particulate emissions (≤ 2.0 grams per hour) Woodchip fueled heating systems (boilers, furnaces) that are: Highly efficient ($\geq 80\%$) Low particulate emissions (≤ 2.0 grams per hour)
Additional Grant Program Proviso	An on-site outdoor particulate emission monitoring equipment will be required to be installed (where wireless internet is available) at each school that receives grant funding.

SUBMITTING THE APPLICATION

The application process will include a two-step application process. First, an Initial Application will be required and then second, a compressive application will be requested from a selection of the initial applications received. Being invited to submit a Comprehensive Application is not a confirmation of funding for an applicant’s project. The intent will be to invite Comprehensive Applications for projects totaling slightly more funds than are available (e.g., \$2.5 million of applications for which \$2 million available to be awarded).

Initial Applications must arrive at the Public Service Department (PSD) office by 4 p.m. on Friday, September 8, 2023. Applications must be emailed. Proposals received after this time and date will not be considered. Information for what information to be included in the Initial Application is below on page five of this RFP and on the Initial Application form attached as Appendix A.

For those asked to submit a Comprehensive Application, those applications must arrive at the Public Service Department (PSD) office by no later than 4 pm on Friday, October 6, 2023. Applications must be emailed. Proposals received after this time and date will not be considered. Information for what information to be included in the Comprehensive Application is below on pages 5-8.

Any questions regarding this RFP should be submitted in writing, preferably by email, with the subject line, “2023 SHARE Program RFP.” **Questions are due by close of business, Monday, August 21, 2023** and will be answered comprehensively at the CEDF web site³ alongside this RFP by Friday, August 25, 2023.

Proposals and questions should be addressed to:

Christopher Heine
Clean Energy Program Specialist
Vermont Public Service Department
112 State Street
Montpelier, VT 05620-2601
Phone: (802) 522-7554
Email: christopher.heine@vermont.gov

INFORMATION FOR APPLICANTS

General Information: While only one proposal may be submitted per school, subrecipients (e.g. HVAC contractors) may be included in more than one proposal.

Term: The projects funded under this solicitation should be operational and completed on or before December 31, 2025.

Reporting: Reporting shall be required for all projects receiving an award. Reporting shall include quarterly progress reports as well as a final report submitted within three months of the grant end date.

Quarterly reports and a final project report shall include expenditures made, specific activities, and results. Five percent of grant funds will be held back until the final report has been received and approved by the PSD

Cost Share: Applicants will be required to demonstrate cost share as part of the project. That cost-sharing should be indicated in the application. A letter of commitment identifying the cost share and its source of funding shall be included as part of the Comprehensive Application. For example, if an applicant has received a commitment from an organization to provide funds that cover part of the cost for the project, the applicant must provide a copy of the commitment letter.

³ <https://publicservice.vermont.gov/renewables/clean-energy-development-fund-cedf/recent-announcements>

Exclusions: All projects must be in a Title I eligible schools located in Vermont. Funds cannot be used for projects that have already begun construction or for equipment purchases made before a grant agreement has been executed.

Revisions: The PSD reserves the right to make necessary changes to this RFP at any time including termination of the program if in the best interest of the State.

INFORMATION REQUIRED FROM APPLICANTS

I. Initial Application

An initial application (attached as Appendix A) must be completed for projects to be considered for grant funding. The grantee will need to match no less than 10% of the project’s total cost and shall specify the source of the cost match. Applicant will be notified what level of cost share requirement will be required when/if asked to submit a Comprehensive Application. All grant funds (including match) must be used for activities related to the project during the grant period (cash or time spent on the project prior to the grant period cannot be applied as matching funds). Projects that receive grant funding must be completed on, or prior to, December 31, 2026.

Applicants must submit a hard signed copy or an electronic copy of the application to Christopher Heine the Vermont Public Service Department. Applications must arrive prior to the deadline.

Initial Applications will be reviewed and scored and those applications that best meet the objectives for the program will be invited to submit a Comprehensive Application. See “Evaluation Criteria” on page seven for scoring criteria. School Districts/School Unions that submit more than one application may be asked to prioritize their applications based on highest need due to limited funding availability.

=====

II. Comprehensive Application

NOTE: This information will only be required after submitting an Initial Application and the applicant is invited to submit a Comprehensive Application. Applicants may not submit a Comprehensive Application prior to or in lieu of submitting an Initial Application.

Comprehensive Applications should be prepared simply and economically, providing a straightforward, 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.

Comprehensive Applications should be no longer than ten pages, with no less than a 12-point font and one-inch margins. Resumes, letters of support, and the Budget Worksheet, or

appendixes **do not** count toward the 10-page limit. The Summary Page and all other information count towards the 10-page limit.

*A. **Summary Page** – Comprehensive Applications must include a one-page summary that includes the following four items:*

1. **Project Title** – Provide a descriptive title for the project.
2. **Identification of Applicant Organization** – State the full name and address of the school or school district responsible for the Application and list the main contact and their contact information.
3. **Project Description** that shall include, at a minimum:
 - **Statement of Need** describing the need this project will address. Include data to demonstrate the need and cite the source of the data.
 - **Budget** – Simple budget that includes any other possible funding for the project.
 - **Cost savings describing the projected fuel and/or electricity savings.**
 - **Fuel savings coming from the project/improvements.**
 - **Energy Savings describing the projected fuel and/or electricity to be saved.**
 - **Pollution control equipment to be installed and/or in existence.**
 - **Emission reductions from installation of new emission controls or repair/improvement of existing system.**
 - **Special Considerations** describing any other information that might assist the State in its selection.
4. **Signature** – Please sign to indicate you have read and acknowledge all of the conditions of this request for proposals, and that, to the best of your knowledge, the information you have supplied is accurate. Electronic signatures are allowed.

B. Project Narrative

Describe the project for which funding is requested. Provide a statement of to the project’s goal(s) and objectives. Describe what the project will accomplish if successful.

Describe reduced particulate and other pollution reductions estimated if installing new pollution control equipment. If not installing new pollution control equipment explain why.

State why this project should receive PSD grant funding and whether the project would happen without PSD grant funding.

C. Personnel

While applicants are not expected to have demonstrable knowledge, skills, and experience as it relates to the required work of the proposal, personnel contracted for the project should be experienced in the technologies proposed for the project. Proposals should include a description of the subrecipient’s (e.g., contractor’s) prior experience in all areas relevant to the proposed program. The proposal must identify all persons that will be contracted for the proposed project by skill and qualifications. Identify key personnel by name and title and provide their prior

experience (if resumes are included, they **do not** count toward the 10-page limit). Subcontractors (if known) must be listed, including the firm name and address and contact person, and complete description of work to be subcontracted. Include descriptive information concerning subcontractor's organization and abilities.

D. Work Plan & Timeline

Describe in narrative form the plan for accomplishing the work required to create and deploy the project. Include a description of any activities in support of the proposal that have already been completed or are in process.

Describe the plan for project oversight, quality assurance measures, and financial management, and which team member(s) will have these responsibilities.

Provide a timeline for the project development and implementation.

E. Budget

The Department will provide a budget worksheet to those applicants that are selected for the Comprehensive Application stage of the program.

F. Additional Information

Proposals must include information described in sections A-F above. In addition, proposals can include any other pertinent and important information.

METHOD OF AWARD

Awards will be made in the best interest of the State. All other considerations being equal, priority will be given first to projects in school districts with the lowest income levels and if the school is listed in a disadvantaged community⁴. Qualitative determinations will be made regarding community need and community impacts.

Awards may be made to flood damaged heating systems on an emergency basis based on emergency evaluation criteria.

1. Evaluation Criteria: A selection committee will review, analyze and rank all submittals based on their response to the information requested. At a minimum, the selection process will include the following criteria in the evaluation of proposals. These criteria are not necessarily listed in order of importance:

- Need
- Population served (disadvantaged communities)
- Measurable results and evaluation
- Prior State grants/awards
- Geographical Equity

⁴ <https://screeningtool.geoplatform.gov/en/#6.77/43.911/-72.601> US Government's Map of Disadvantaged Communities.

- Project's leverage of/coordination with other projects, programs, or funding
- Energy/fuel savings
- Pollution emission reductions (including particulates from wood combustion)
- Project's potential for energy cost savings
- Increase in the health and safety of students and staff at the school
- Increase of local business revenue cycles within Vermont
- Community involvement and acceptance of the project

2. Experience & Qualifications of applicant and sub-contractors (if known):

- Knowledge and experience in the relevant project area, including successful experience with similar projects
- Demonstrated ability to complete project on time, on budget, and to complete the reporting requirements
- Previous experience with state and/or federal contracts or grants

3. Budget:

- Budget line items and amounts are sufficiently described and justified to explain the necessity of each item
- Costs are reasonable and competitive

GENERAL TERMS AND CONDITIONS

1. Projects funded through this RFP must comply with the programmatic agreement between the PSD and the Vermont State Historic Preservation Office. While energy improvements to historic buildings are greatly encouraged, they must be carefully planned to avoid unintended consequences. Funded work must not harm or destroy historic buildings or archeological sites that are eligible for or listed on the National Register of Historic Places. Some school buildings that are over 50 years old are likely to meet National Register criteria. The Vermont Division for Historic Preservation can provide information on National Register status, appropriate treatments for improving energy performance in historic buildings, and a list of preservation consultants who can assist applicants in planning their projects. Generally, boiler/furnace upgrades will meet preservation guidelines. Applicants may want to consult the Division's website at www.historicvermont.org
2. The PSD 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.
3. The PSD shall not be responsible for any costs incurred by any party in preparation of any proposal submitted in response to this RFP.

4. The PSD reserves the right to amend or cancel this RFP at any time if the best interest of the State requires such action.
5. News releases pertaining to this RFP, grant award, or the project shall not be made without prior written approval from the PSD.
6. All parties submitting proposals shall be Equal Opportunity Employers. During the duration of the performance any grant agreement resulting from this RFP, the awardee shall comply with all federal, state and local laws respecting non-discrimination in employment.
7. After a grant agreement is executed, the PSD will reimburse the contractor(s) for actual work performed and expenses incurred up to the specified grant 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. Final payment will require the submission of a final report.
8. Insurance: The awardee shall name the State of Vermont and its officers and employees as additional insureds for liability arising out of this Agreement.
9. The PSD and the State assume 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 State 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.
10. All grant awards are subject to the availability of funding.

Appendix A

Initial Application

2023 High-Poverty Schools Heating Assistance Program – Wood Heating Focus

Initial Application

Please fill out each section below to the best of your knowledge/ability and sign. Send either a signed original to the address below and/or email an electronic copy to christopher.heine@vermont.gov. If you can't enter text into the boxes below a separate document can be submitted with answers to all the questions below.

Christopher Heine
Public Service Department
112 State St.
Montpelier, VT 05620

School Name:

School District/Union:

Applicant Name:

Email:

Phone:

Title:

Authorized Representative (if different applicant)

Proposed Project Description: Please include a list of tasks to complete project; project timeline including estimated start and completion dates; Personnel that will be responsible for the completion of the above should be identified.)

Estimated Total Project Cost \$:

Grant Funds Requested \$:

Source for matching funds:

(Describe source of funds, including pending and projected funds. Describe whether there is an outstanding request or request yet to be made for any of the funds and the likelihood of receiving funds; include expected timelines for confirming pending sources of requested funds)

Approvals Required (include a brief description of any State, town, or school board approvals received or needed for project):

Permitting Required (include a list of permits to needed for the project):

Preliminary Planning/Project Development (Describe any planning or project development that has been completed for the project):

Signature of Authorized Representative:

Date:

Printed Name of Authorized Representative: