



REQUEST FOR PROPOSALS

Update to Vermont Energy Efficiency
Potential Study for
Electricity and Natural Gas

DATE ISSUED: 12/11/2024

QUESTIONS ON RFP DUE: 12/18/2024

INTENT TO BID DUE: 1/09/2025

PROPOSALS DUE: 1/17/2025

Brian Cotterill
Energy Program Manager
Vermont Public Service Department
112 State Street, 3rd Floor
Montpelier, Vermont 05620-2601
(802) 828-3212
brian.cotterill@vermont.gov

INTRODUCTION

The Vermont Public Service Department is an agency within the Executive Branch of the Vermont state government that represents the public interest in energy, telecommunications, water, and wastewater utility matters. The PSD's mission is to serve all Vermont citizens through public advocacy, planning, programs, and other actions that meet the public's need for least-cost, environmentally sound, efficient, reliable, secure, sustainable, and safe energy, telecommunications, and regulated utility systems in the state for the short and long term.

The PSD seeks a contractor or team of contractors to conduct an update to the 2021 electric and natural gas energy efficiency potential study. The update will be applicable to Vermont's three Energy Efficiency Utilities (EEUs) which are Efficiency Vermont (EVT) operated by Vermont Energy Investment Corporation, City of Burlington Electric Department (BED), and Vermont Gas Systems (VGS). The primary objective of this work is to estimate electric and natural gas energy efficiency potential by various definitions including technical, economic, maximum achievable, and program achievable potential. Additional objectives include rate and bill impact analysis and development of program implementation models for BED and VGS.

Prospective bidders must have extensive experience and demonstrated abilities in all aspects of energy efficiency program delivery and design, including strategies and principles for program cost-effectiveness screening, forecasting methodology, rate and bill impact analysis, and report writing. Bidders must demonstrate the ability to produce draft and final deliverables on time and be willing to work closely with the Department, Vermont's EEUs, and other stakeholders as needed. **The budget for this total project is \$165,000-\$185,000.**

Proposals are due by 4:00 PM 01/17/2025. The contract will be executed as soon as practicable following the award.

Questions about the RFP should be submitted via e-mail by 12/18/2024. Responses to questions will be posted on the [Vermont Business Registry](#) and the PSD website under the [Request for Proposals section](#) on or before January 3, 2025. Intent to submit a proposal is due January 9, 2025.

Responses to this RFP should be sent in electronic format only. Any questions, notifications of intent to bid, and proposals should arrive before the deadlines and be addressed to:

Brian Cotterill
Email: brian.cotterill@vermont.gov

Date of Issue of the RFP	12/11/2024
Last Day for Submitting Questions	12/18/2024
PSD Response to Vendor Questions	01/03/2025
Notification of Intent to Bid	01/09/25
Proposal Due Date	01/17/2025

SCOPE OF WORK

The major areas of focus for the scope of work shall include the following tasks:

- Task 1 - Kickoff meeting and revised work plan
- Task 2 - Data collection and preparation
- Task 3 - Potential estimate analysis
- Task 4 – Scenarios technical assistance
- Task 5 – BED and VGS program models
- Task 6 - Rate and bill impacts
- Task 7 - Reporting
- Task 8 - General administration and management

1. TASK 1: KICK-OFF MEETING AND REVISED WORK PLAN

Respondents should propose a plan and process for kicking-off the project and submitting a revised work plan to the Department including the guidelines below. This meeting should occur virtually or in person, as soon as possible following the selection of a contractor.

- Meet with PSD staff, EVT, BED, VGS and any other stakeholders as determined by the PSD to ensure there is a common understanding of the project's needs and the proposed work efforts and products. Prior to the kick-off meeting review at minimum the EEU modeling and PUC orders in the most recent Demand Resources Plan proceeding in case number 22-2954-PET. This material can be sourced by accessing ePUC at the following web address <https://epuc.vermont.gov/>¹². In addition, review the EEU structure, the Technical Reference Manual (TRM), and the EEU Order of Appointments for efficiency delivery in Vermont.
- Identify the level of EVT, BED, VGS, and any other Vermont Utility assistance needed to effectively carry out the scope of work as well as meet the timelines associated with this work.
- Following the kick-off meeting, submit a revised work plan documenting the common understandings between the contractors and the PSD (and stakeholders). This plan should represent the detailed schedule for completion of preliminary results and final products (e.g. draft and final reports, and final project databases).

TASK 2: DATA COLLECTION AND PREPARATION

Respondents should propose a plan and process for collecting the data needed for the project. Respondents should expect the scope of work to include the following at minimum.

¹ Search for Case 22-2954-PET in ePUC. <https://epuc.vermont.gov/>

² Potential Study report. <https://epuc.vermont.gov/?q=downloadfile/632187/171403>

- The potential study will be used to inform the Department’s EEU budget and performance target recommendations for the 2027-2029 and 2030-2032 performance periods. Potential study estimates should be provided for a 20-year timeframe, starting in 2027 through 2046.
- EVT, BED, and VGS each have different energy savings portfolio so potential study estimates should be established individually for each entity and should reflect each utility’s unique customer base. For example, BED’s service territory is 75% commercial and 25% residential (the top 20 largest commercial customers use about 50% of total annual kWh sales) and has a high percentage of leased building space (60% of residential customers are renters) as well as a high penetration of natural gas service, about 95% of all buildings. Therefore, estimating BED’s savings potential as a subset of EVT’s statewide estimates would not provide accurate results as there are distinct and critical differences between the two customer bases.
- Program participation estimates should reflect specific estimates of baseline equipment saturation in each EEU service territory. Preliminary market assessment data may be available to incorporate from the Department’s currently ongoing baseline studies, however the market assessments will not be final until fall 2025. Supplemental equipment saturation data may be supplied by the host utility.
- Statutory obligations and considerations as described in 30 V.S.A. §209(d) and (e); including the statutory requirement for Vermont to acquire all reasonably achievable cost-effective energy efficiency.
- As provided by the PSD and the DUs, incorporate service territory specific load forecasts for EVT, BED, and VGS that exclude the load of customers that self-manage their energy efficiency needs.
- Include the extent to which baseline efficiency levels have changed or are expected to change (e.g. due to code and standard adoption or federal standards) in Vermont.
- Consider the full array of technologies that are commercially available today as well as emerging technology measures expected to be on the market within the study timeline.
- Include inputs from the Vermont Technical Reference Manual³ (TRM) regarding measure characterizations (measure costs, measure savings and lifetimes) as well as market insights from past program performance, Vermont specific EM&V results. For example, preliminary or final results from PSD’s currently ongoing Cold Climate Heat Pump evaluation.

³ <https://publicservice.vermont.gov/document/state-screening-tool-2023>

- Assumptions should consider treatment of behavioral programs, new construction programs (Res. and C&I), reasonable levels of emerging technologies, and available financing for energy efficiency measures.
- Present potential based on the EEU’s residential and commercial/ industrial (“C&I”) sectors at minimum and with consideration of the EEUs major markets as follows.

For EVT and BED:

- Business New Construction
- Business Existing Facilities
- Residential New Construction
- Efficient Products
- Existing Homes

For VGS:

- Business New Construction
- Business Retrofit
- Business Equipment Replacement
- Residential New Construction
- Residential Retrofit
- Residential Equipment Replacement

- Include assumptions about the rate of fuel-switching. Including the effects of Vermont’s RES Tier III programs, operated by Distribution Utilities, which will require an increasing share of their customers to switch their fossil fuel usage to electricity and biomass.

TASK 3: POTENTIAL ESTIMATE ANALYSIS

Energy Efficiency – Regulated Fuels

Sub-task: 3.1 Electric energy efficiency potential for EVT

Sub-task: 3.2 Electric energy efficiency potential for BED

Sub-task 3.3 Natural gas energy efficiency potential for VGS

Sub-task 3.1, 3.2, and 3.3 are associated with the statutory mandate to “achieve all reasonably achievable, cost-effective energy efficiency” as the least-cost strategy for meeting Vermont’s energy demand, paid for with a separately stated Energy Efficiency Charge on customers electric and natural gas bills.

Respondents should consider the following elements in their proposals.

- Clearly define and estimate the potential for efficiency savings at four levels including technical, economic, maximum achievable, and program achievable potential.
- Respondents are asked to specify how they intend to construct new or amend current baseline forecasts of load against which these concepts of efficiency potential will be measured,

including how assumptions about fuel-switching and policy-driven load growth will be handled. Please see the most recent ISO-NE CELT Report⁴ and/or the most recent version of Vermont Electric Power Company (VELCO) Long Range Transmission Plan which contain potential load impact of electrification of space heating and transportation⁵.

- At minimum, potential should be stated in terms of net societal benefit, annualized, lifetime, and cumulative energy savings (MWh, therms): as a percent of energy sales (annual and cumulative), and summer and winter peak demand savings (MW and therms; annual, lifetime, and cumulative), and both energy and non-energy greenhouse gas emission reductions.
- Respondents should consider that EVT and BED electric energy efficiency programs are intended to be in alignment whenever possible. However, EVT and BED electric energy efficiency program service territories do not overlap and market conditions, baseline levels of efficient equipment saturations, and the ratio of residential to commercial customers are not the same in EVT and BED service territories.
- Respondents should consider that VGS’s service territory overlaps with both BED and EVT but does not extend throughout the entire state.
- The analysis should take into account that natural gas energy efficiency programs, projects, and measures also yield electric benefits. The analysis should attribute cost and benefits of such “EEU coordinated services” appropriately.
- Include measure cost effectiveness based on 2024 avoided costs.

TASK 4: SCENARIOS TECHNICAL ASSISTANCE

Technical assistance not to exceed \$45,000 billed as time and materials for translating potential model outputs from Task 3 for use in a PSD provided scenario model tool. Technical assistance is at the discretion of the PSD as needed. The scenarios model tool should be capable of comparing the benefits and costs of unique scenarios optimized for different costs, benefits, and program designs to the program achievable results as well as differences in rate and bill impacts.

TASK 5: BED AND VGS PROGRAM MODEL

Sub-task: 5.1 Electric energy efficiency program model - BED

Sub-task 5.2 Natural gas energy efficiency program model - VGS

Using the program achievable potential for BED and VGS as a basis provide BED and VGS with a program implementation model for years 2027-2029 and 2030-2032. The contractor will consult with BED and VGS prior to handing off the program implementation model and make

⁴ <https://www.iso-ne.com/system-planning/system-plans-studies/celt>

⁵ https://www.velco.com/sites/default/files/2024-09/101252_Velco_CC24_singles.pdf

program planning specific changes as needed. After the hand-off the contractor may need to be available to provide technical assistance to BED and VGS as needed.

TASK 6: RATE AND BILL IMPACT ANALYSIS

The Department currently has one common tool to produce rate and bill outputs. The contractor will be expected to update the tool as needed in coordination with the PSD, EEUs, and other stakeholders to ensure the methodology for assessing rate and bill impacts is comprehensive, transparent, and applicable to different scenarios.

Rate and bill impacts for maximum and program achievable scenarios for each EEU is expected. If the PSD selects optional Task 4 then the contractor will be expected to integrate the rate and bill impact tool into the scenarios model.

Sub-task: 6.1 Rate and bill EVT:

- *Electric maximum and program achievable potential*

Sub-task: 6.2 Rate and bill BED

- *Electric maximum and program achievable potential*
- *Electric program model*

Sub-task: 6.3 Rate and bill VGS

- *Natural gas maximum and program achievable potential*
- *Natural gas program model*

TASK 7: REPORTING

Respondents should include a detailed proposal for reporting including interim, draft final, and final reports as well as expect that some review and iteration with the EEUs will occur in the drafting phase.

The PSD may request the selected contractor to present elements of this scope of work, draft reports, and/or final products at one or more technical hearings or workshops hosted by the Vermont Public Utility Commission. Any presentations are expected to be virtual.

TASK 8: GENERAL ADMINISTRATION AND MANAGEMENT

Management responsibilities include regular updates with the PSD project manager. The selected Contractor shall assign one project manager that will be the lead in terms of communication with the PSD. Management responsibilities include regular, every two weeks (at a minimum) updates with the PSD project manager via conference call, in which contractor will provide a project progress review.

In addition, the contractor shall prepare a written report every two weeks indicating the progress over the prior two weeks, the planned activities for the next two weeks, any issues that need to be addressed with suggested in-budget resolutions.

In addition, the contractor should plan and budget for facilitating sufficient collaboration between the PSD and EEU's. The PSD is interested in including the EEU's input and perspective

when appropriate. Part of the contractor’s role will be to efficiently synthesize collaborative input.

PROJECT TIMELINE

Respondents should propose a detailed timeline for completing the project. The project timeline should start with a kick-off meeting, end with final deliverables and include interim milestones approximating the schedule in the table below.

Key Deliverable Tasks	Draft/Final Deliverable
Rate and bill impact tool – Task 6	Initial Draft – February 13, 2025 Final Draft – March 6, 2025
Potential Study and rate and bill impacts– Task 3 and 6	Initial Draft – April 10, 2025 Technical Hearing - week of April 28, 2025 Final – May 22, 2025
BED & VGS program models & EEU rate and bill impacts– Task 5	Final – June 19, 2025
Scenarios technical assistance – Task 4	May 22, 2025 through end of contract

BUDGETS

Respondents should clearly outline budgets for each component of this work as established in the scope of work and for the total project, including project management, kickoff meetings, database management, and reporting. Hourly rates should be identified and remain the same for the duration of the contract. Travel-related costs (mileage, meals, and lodging reimbursement) should be identified, budgeted separately, and then built into hourly billing rates. Should this not be possible or practical, the contractor should provide a reasonable argument as to why this is the case.

Respondents should clearly outline proposed budgets by task for the total project. In addition, respondents should disaggregate the overall proposed budget and present separate budgets for each utility (EVT, BED, and VGS).

At the discretion of the State, a contract resulting from this RFP may provide that the State withhold a percentage of the total amount payable for some or all deliverables. Such retainage will be payable upon satisfactory completion and State acceptance in accordance with the terms and conditions of the contract. **The Budget for this project is \$165,000-\$185,000.**

PERFORMANCE

Contractor must agree to the following performance measure language:

1. Contractors will hold bi-weekly meetings with the Department to discuss progress.

2. Contractor shall notify the Department in a timely fashion should they anticipate any material impacts to either schedule or budget may occur and present a plan to mitigate those impacts.
3. Extensions to agreed-upon deliverable dates require approval of the Department.
4. Where possible, the contractor shall submit all work in advance of deadlines to allow adequate time for PSD review and production.

If the quality of work described above were to deteriorate in any way, the department would request that the work be resubmitted immediately at no additional charge. If there were no immediate improvement in the overall quality of work, the Department would no longer retain the contractor.

GENERAL REQUIREMENTS

The Contractor hired must meet the following General Requirements:

1. Contractor(s) must have extensive experience and demonstrated abilities in all relevant aspects of energy efficiency evaluation techniques, strategies, and principles, including study design, participant recruitment, on-site data gathering in residential and/or commercial buildings, data analysis, statistical sampling design to address reliability, variance, and bias; and report writing. Contractors should possess a good knowledge of energy efficiency program design, implementation, monitoring, verification, and evaluation.
2. Contractor(s) must be fully conversant with current energy efficiency information technology systems, DSM tracking systems, and applications.
3. Contractor(s) must not be currently employed by a partner firm in Efficiency Vermont, by EVT itself, by the Burlington Electric Department or Vermont Gas Systems, and must agree not to undertake such employment during the term of this contract without explicit approval from the Public Service Department.
4. Contractor(s) must be available to begin work immediately after the contract is awarded and commit to work completion as quickly as possible.
5. A lead firm and lead contact person must be identified in joint proposals.

TERMS AND CONDITIONS

1. Respondents must provide an hourly rate for various personnel to be assigned to each task identified in the proposal. While actual hours by task cannot be known with precision in advance, a best estimate should be provided with the proposal. A “not to exceed” budget figure will be established in the Terms and Conditions of the contract with the successful bidder.
2. A Bidder shall be solely responsible for all expenses incurred in the preparation of a response to this RFP and shall be responsible for all expenses associated with any presentations or demonstrations associated with this request and/or any proposals made.

3. Ownership of all work products will rest with the Department.
4. Any work products will be delivered to the Department upon termination of the project.
5. Contractors(s) must agree to enter a confidentiality agreement to protect certain customer specific information from public disclosure, as necessary.
6. The PSD reserves the right to amend or cancel this RFP at any time if the best interest of the State requires such action.
7. The PSD reserves the right to reject any or all proposals and to waive informalities and minor irregularities in proposals received and to accept any portion of a proposal if deemed in the best interest of the State.
8. The PSD reserves the right to accept or reject any bids, in whole or in part, with or without cause in the best interest of the State and to obtain clarification or additional information.
9. The PSD reserves the right to to make purchases outside of the awarded Contracts where it is deemed in the best interest of the State.
10. News releases pertaining to this RFP, contract award, or the Project shall NOT be made without prior written approval from the PSD.
11. The PSD will select the winning bidder based on its sole opinion that the proposal submitted will be the most advantageous for the State.
12. The PSD reserves the right to select without further discussing the proposals received. Therefore, each proposal must be submitted in the most complete and accurate manner possible. The PSD reserves the right to negotiate with the selected bidder in the best interests of the State.
13. The PSD reserves the right to cancel any contract resulting from this RFP for cause, as will be defined in the final contract's Terms and Conditions.
14. Contractor agrees to the terms and conditions of Attachment C which outline the Standard State Provisions for Contracts and Grants. Any requested deviations from these Attachments must be presented in the response to this RFP. The PSD and the State reserve the right to deny any such request.

The PSD assumes no liability in any fashion with respect to this RFP or any matters related thereto. All prospective service providers and their assigns or successors, by their participation in the RFP process, shall indemnify, save and hold the PSD and its employees and agents free and harmless from all suits, causes of action, debts, rights, judgments, claims, demands, accounts, damages, costs, losses and expenses of 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 service provider and any action brought by an unsuccessful prospective service provider.

It is imperative that the contractor(s) reveal any connections they or any subcontractors have that may indicate a conflict of interest. A contractor may not assign or subcontract the performance of

a Contract or any portion thereof to any other entity without the prior written approval of the State.

As data handled by the selected contractor(s) is potentially sensitive in nature, the contractor will need to sign and abide by a confidentiality agreement.

Bidder Confidentiality and Access to Public Records: All responses and other information disclosed in connection with an RFP become the property of the State and, once the resulting Contract is finalized, may be subject to disclosure under the State's Public Records Act, [1 V.S.A. § 315](#) et seq. Accordingly, the RFP must instruct the bidder to identify any material included in the response that is considered by the bidder to be proprietary or otherwise exempt from public disclosure in the event of a public records request, pursuant to [1 V.S.A. § 317\(c\)](#). The bidder's response must include a written explanation for each marked section that would support a reasonable claim of exemption, such as, for example, a description of the proprietary nature of the information and the harm that would occur should the material be disclosed. Additionally, the RFP must instruct the bidder to include a redacted copy of its response. Redactions must be limited so that the reviewer may understand the nature of the information being withheld. It is typically inappropriate to redact entire pages, or to redact the titles/captions of tables and figures. Under no circumstances can the entire response or price information be marked confidential. Should the Agency have concerns about the submitted redactions/explanations or lack thereof, the Agency may invite the bidder to provide sufficient explanation and/or appropriate redaction rights.

DATABASES FROM PROJECT

Data entry procedures shall be developed to ensure data quality and consistent entry of all fields. Data shall be submitted to the Department in a mutually acceptable, commonly usable electronic format, along with a documented data dictionary describing the database contents. Proposals should discuss any suggested database to be used and the data quality procedures planned.

The selected contractor will deliver, at a minimum:

1. The screening tool used to compare measure and program benefits and costs over the life expectancy of program and measure savings for all applicable tasks. This screening tool will be a transparent, functioning MS Excel workbook or other format.
2. The rate and bill impact analysis tools and models used to calculate the impacts.

All information and data collected under this project must be provided to PSD upon request to support additional analysis and comments by staff. Quality control procedures must be applied to ensure that data is organized and submitted in a mutually acceptable, commonly usable electronic format. A transfer of all data shall occur upon termination of the contract. However, any and all data and information must be provided to the Department upon request at any point during the project period.

SELECTION CRITERIA

The contractor selection process will be carried out by a proposal review team comprised of Department staff and other stakeholders as deemed appropriate by the PSD. The Team will follow all appropriate procedures and requirements as required under the State of Vermont's

acquisition process. Once a proposal has been selected, PSD will immediately notify Respondents of their status. A successful contractor or contractor team must be available to begin work immediately following receipt of the award.

The Department's Proposal Review Team will score and review all proposals according to the following Selection Criterion:

1. Experience and demonstrated capabilities in energy efficiency potential studies, including study design, data analysis, and presentation. Please list two references that may be contacted to verify whether prior work was or was not satisfactory.
2. Experience of the key staff successfully completing similar projects, and the firm's ability to provide timely and in-budget results.
3. Ability to commit key staff for the duration of the project and complete the requested scope of work within the scheduled timeframe.
4. Experience of key personnel, as well as the proposed staffing plan.
5. Price and value.
6. Writing skills and abilities, including a demonstrated proficiency in conveying complex topics in clear and concise language (demonstrated through writing samples of key staff and overall quality of proposal).
7. Quality and completeness of the proposal (in terms of responsiveness to this Request for Proposal, organization, graphics, grammar, spelling, etc). The clarity and organizational aspects of the proposal will be considered an indication of those qualities in future deliverables from the contractor.

The PSD may follow up with a round of questions to all or some of the applicants based on the information in the proposals. A phone interview may also be scheduled for additional clarification of the information in the proposals and the follow-up responses. The review sheet, provided on the following page, includes scoring elements as well as non-quantitative elements that will be considered when awarding a contract. The proposal with the highest score may not ultimately be awarded the contract.

Proposal Review Sheet

PROPOSER: _____

REVIEWER: _____

Rate proposal on each criterion on the following scale: 1=Fails criterion. 2= Minimally meets criterion. 3=Meets criterion. 4=Somewhat exceeds criterion. 5= Greatly exceeds criterion.

RATING (1-5)	CRITERIA
	1. Experience and demonstrated capabilities in energy efficiency potential studies, study design, data analysis, and presentation.
	2. Experience of <i>key personnel</i> in completing similar projects and ability to provide on-time, on-budget reports.
	3. Experience of <i>the Program Manager</i> and the <i>Bidding Firm(s)</i> in successfully completing similar projects and ability to provide on-time, on-budget results.
Score A-C Below	4. The proposal presentation for the following criteria:
	A. Clear understanding of requirements as laid out in the RFP; practicality of the proposed approach in meeting objective.
	B. Technical expertise to complete the project.
	C. Quantity and quality of work relative to specified budget.
	5. Proposed staffing plan of bidder, including staff assignments.
	6. Clarity and reasonableness of work plan, including definition and timeliness of tasks to be performed, quality assurance measures defined, and ability to start quickly.
	7. Timeline is reasonable and meets appropriate deadlines.
	8. Budget line items and amounts are sufficiently described and justified. Administrative costs are reasonable and competitive.
	9. Quality and completeness of the proposal (in terms of coverage, organization, graphics, grammar, spelling, etc.).
	10. Contractors/subs have an office located in Vermont 1=Yes 0=No
	11. Price.
	Total Score (Max 61 Pts. Possible)

12. **Other comments / qualitative reactions to proposal** including past performance of the bidder on PSD contracts and any proposed sub-contractors.

Notes on potential conflicts of interest:

PROPOSAL SUBMISSIONS

Proposals may include one or more contractors but should identify a primary lead contractor.

The proposal should clearly understand the issues to be addressed and describe how the contractor's proposed approach accomplishes the evaluation goals. The proposal should be structured to provide the following information:

1. Understanding of the scope of work and associated issues
2. Overview of the proposed approach
3. Detailed Work Plan and related task descriptions
4. Descriptions of similar projects
5. Qualifications of firm(s)
6. Qualification of individuals
7. Management and staff structure
8. References
9. Timeline
10. Task and total project budget that includes a listing of all staff assigned to the project and their time allocations and billing rates
11. Mandatory Bidder Form / Certificate of Compliance (see page 19 of this RFP)
12. Appendix A: Sample report from the prime contractor
13. Appendix B: Other attachments as appropriate

Understanding of the research goals and associated issues: This section should discuss the key issues associated with achieving the scope of work. It will allow the PSD to assess the contractor's understanding of the objectives that need to be addressed.

Overview of the proposed approach: This section should present an overview of the contractor's research overall approach/methodology, allowing the PSD to determine whether the proposed methods are appropriate to the objectives.

Detailed Work Plan and related task descriptions: This section should include a detailed work plan with a description of individual tasks/activities, a data management strategy (as necessary), and a staffing plan. This section should be descriptive enough to aid the PSD in understanding how the research will be conducted. This section should describe quality assurance measures that will be implemented to ensure that services will be delivered effectively, efficiently, timely, and competently. This section should also address any specific analytic approaches and related reporting activities.

Descriptions of similar projects conducted: This section provides a brief presentation of similar types of research conducted by the prime contractor and other key research team members. The discussion should allow PSD to assess the experiences of the contractor or the contractor team relative to the goals of this project.

Qualifications of firm(s): This section allows the contractor to present their corporate qualifications in addition to the above descriptions.

Qualification of individuals: The proposal should describe the individuals to be assigned to the tasks and their qualifications, along with the key staff's experience in successfully completing similar projects and the firm's ability to provide timely and in-budget results.

Management and staff structure: The proposals should clearly define the team's management and operational structure. Additionally, address the ability to commit key staff for the project's duration and complete the requested scope of work within the scheduled timeframe.

References: The contractor should provide at least two references for similar work from other clients. The references should include a brief description of the research effort, including the name, address, telephone number, and e-mail address of the client's representative for the referenced project.

ADDITIONAL REQUIREMENTS

EXECUTIVE ORDER 05-16: CLIMATE CHANGE CONSIDERATIONS IN STATE PROCUREMENTS:

For bid amounts exceeding \$25,000.00, bidders are requested to complete the Climate Change Considerations in State Procurements Certification, which is included in the Certificate of Compliance for this RFP.

After consideration of all relevant factors, a bidder that demonstrates business practices that promote clean energy and address climate change as identified in the Certification, shall be given favorable consideration in the competitive bidding process. Such favorable consideration shall be consistent with and not supersede any preference given to resident bidders of the State and/or products raised or manufactured in the State, as explained in the Method of Award section. But, such favorable consideration shall not be employed if prohibited by law or other relevant authority or agreement.

WORKER CLASSIFICATION COMPLIANCE REQUIREMENTS:

In accordance with Section 32 of The Vermont Recovery and Reinvestment Act of 2009 (Act No. 54), Bidders must comply with the following provisions and requirements.

1. **Self Reporting:** For bid amounts exceeding \$250,000.00, Bidder shall complete the appropriate section in the attached Certificate of Compliance for purposes of self-reporting information relating to past violations, convictions, suspensions, and any other information related to past performance relative to coding and classification of workers. The State is requiring information on any violations that occurred in the previous 12 months.
2. **Subcontractor Reporting:** For bid amounts exceeding \$250,000.00, Bidders are hereby notified that upon award of contract, and prior to contract execution, the

State shall be provided with a list of all proposed subcontractors and subcontractors' subcontractors, together with the identity of those subcontractors' workers compensation insurance providers, and additional required or requested information, as applicable, in accordance with Section 32 of The Vermont Recovery and Reinvestment Act of 2009 (Act No. 54). This requirement does not apply to subcontractors providing supplies only and no labor to the overall contract or project. This list **MUST** be updated and provided to the State as additional subcontractors are hired. A sample form is available online at <http://bgs.vermont.gov/purchasing-contracting/forms>. The subcontractor reporting form is not required to be submitted with the bid response.

ATTACHMENTS TO BE INCLUDED WITH CONTRACT

ATTACHMENT B – PAYMENT PROVISIONS

The maximum dollar amount payable under this contract is not intended as any form of a guaranteed amount. The Contractor will be paid for products or services actually delivered or performed, as specified in Attachment A, up to the maximum allowable amount specified on page 1 of this contract.

1. Prior to commencement of work and release of any payments, Contractor shall submit to the State:
 - a. a certificate of insurance consistent with the requirements set forth in Attachment C, Section 8 (Insurance), and with any additional requirements for insurance as may be set forth elsewhere in this contract; and
 - b. a current IRS Form W-9 (signed within the last six months).
2. Payment terms are **Net 30** days from the date the State receives an error-free invoice with all necessary and complete supporting documentation.
3. Contractor shall submit detailed invoices itemizing all work performed during the invoice period, including the dates of service, rates of pay, hours of work performed, and any other information and/or documentation appropriate and sufficient to substantiate the amount invoiced for payment by the State. All invoices must include the Contract # for this contract.
4. Contractor shall submit invoices to the State in accordance with the schedule set forth in this Attachment B. Unless a more particular schedule is provided herein, invoices shall be submitted not more frequently than monthly.
5. Invoices shall be submitted to the State at the following address: psd.invoice@vermont.gov.
6. The payment schedule for delivered products, or rates for services performed, and any additional reimbursements, are: _____.

ATTACHMENT C: STANDARD STATE PROVISIONS FOR CONTRACTS AND GRANTS

Revised October 1, 2024

“Attachment C: Standard State Provisions for Contracts and Grants” (revision version dated October 1, 2024) constitutes part of this Agreement and is hereby incorporated by reference as if fully set forth herein and shall apply to the purchase of all goods and/or services by the State under this Agreement. A copy of this document is available online at:

<https://bgs.vermont.gov/purchasing-contracting/forms>.

MANDATORY BIDDER FORM / CERTIFICATE OF COMPLIANCE

Complete sections A through E and sign at the end

Date:

For a bid to be considered valid, this form must be completed in its entirety, executed by a duly authorized representative of the bidder, and submitted as part of the response to the proposal.

- A. **NON COLLUSION:** Bidder hereby certifies that the prices quoted have been arrived at without collusion and that no prior information concerning these prices has been received from or given to a competitive company. If there is sufficient evidence to warrant investigation of the bid/contract process by the Office of the Attorney General, bidder understands that this paragraph might be used as a basis for litigation.
- B. **CONTRACT TERMS:** Bidder hereby acknowledges that is has read, understands and agrees to the terms of this RFP, including Attachment C: Standard State Contract Provisions, and any other contract attachments included with this RFP.
- C. **WORKER CLASSIFICATION COMPLIANCE REQUIREMENT:** In accordance with Section 32 of The Vermont Recovery and Reinvestment Act of 2009 (Act No. 54), the following provisions and requirements apply to Bidder when the amount of its bid exceeds \$250,000.00.

Self-Reporting. Bidder hereby self-reports the following information relating to past violations, convictions, suspensions, and any other information related to past performance relative to coding and classification of workers, that occurred in the previous 12 months.

Summary of Detailed Information	Date of Notification	Outcome

Subcontractor Reporting. Bidder hereby acknowledges and agrees that if it is a successful bidder, prior to execution of any contract resulting from this RFP, Bidder will provide to the State a list of all proposed subcontractors and subcontractors' subcontractors, together with the identity of those subcontractors' workers compensation insurance providers, and additional required or requested information, as applicable, in accordance with Section 32 of The Vermont Recovery and Reinvestment Act of 2009 (Act No. 54), and Bidder will provide any update of such list to the State as additional subcontractors are hired.

Bidder further acknowledges and agrees that the failure to submit subcontractor reporting in accordance with Section 32 of The Vermont Recovery and Reinvestment Act of 2009 (Act No. 54) will constitute non-compliance and may result in cancellation of contract and/or restriction from bidding on future state contracts.

D. Executive Order 05–16: Climate Change Considerations in State Procurements Certification

Bidder certifies to the following (Bidder may attach any desired explanation or substantiation. Please also note that Bidder may be asked to provide documentation for any applicable claims):

1. Bidder owns, leases or utilizes, for business purposes, space that has received:

- Energy Star® Certification
- LEED®, Green Globes®, or Living Buildings ChallengeSM Certification
- Other internationally recognized building certification:

2. Bidder has received incentives or rebates from an Energy Efficiency Utility or Energy Efficiency Program in the last five years for energy efficient improvements made at bidder's place of business. Please explain:

3. Please Check all that apply:

- Bidder can claim on-site renewable power or anaerobic-digester power ("cow-power"). Or bidder consumes renewable electricity through voluntary purchase or offset, provided no such claimed power can be double-claimed by another party.
- Bidder uses renewable biomass or bio-fuel for the purposes of thermal (heat) energy at its place of business.
- Bidder's heating system has modern, high-efficiency units (boilers, furnaces, stoves, etc.), having reduced emissions of particulate matter and other air pollutants.
- Bidder tracks its energy consumption and harmful greenhouse gas emissions. What tool is used to do this? _____
- Bidder promotes the use of plug-in electric vehicles by providing electric vehicle charging, electric fleet vehicles, preferred parking, designated parking, purchase or lease incentives, etc..
- Bidder offers employees an option for a fossil fuel divestment retirement account.

- Bidder offers products or services that reduce waste, conserve water, or promote energy efficiency and conservation. Please explain:

4. Please list any additional practices that promote clean energy and take action to address climate change:

E. Executive Order 02 – 22: Solidarity with the Ukrainian People

- By checking this box, Bidder certifies that none of the goods, products, or materials offered in response to this solicitation are Russian-sourced goods or produced by Russian entities. If Bidder is unable to check the box, it shall indicate in the table below which of the applicable offerings are Russian-sourced goods and/or which are produced by Russian entities. An additional column is provided for any note or comment that you may have.

Provided Equipment or Product	Note or Comment

Bidder Name: _____ Contact Name: _____

Address: _____ Fax Number: _____

_____ Telephone: _____

_____ E-Mail: _____

By: _____ Name: _____

Signature of Bidder (or Representative)

(Type or Print)

END OF CERTIFICATE OF COMPLIANCE

EXAMPLE: SUBCONTRACTOR REPORTING FORM

This form is provided for reference only and not required for proposals.

This form must be completed in its entirety and submitted prior to contract execution and updated as necessary and provided to the State as additional subcontractors are hired.

The Department of Buildings and General Services in accordance with Act 54, Section 32 of the Acts of 2009 and for total project costs exceeding \$250,000.00 requires bidders to comply with the following provisions and requirements.

Contractor is required to provide a list of subcontractors on the job along with lists of subcontractor's subcontractors and by whom those subcontractors are insured for workers' compensation purposes. Include additional pages if necessary. This is not a requirement for subcontractor's providing supplies only and no labor to the overall contract or project.

Subcontractor	Insured By		Subcontractor's Sub	Insured By

Date: _____

Name of Company: _____

Contact Name: _____

Address: _____

Title: _____

Phone Number: _____

E-mail: _____

Fax Number: _____

By: _____

Name: _____

Failure to adhere to Act 54, Section 32 of the Acts of 2009 and submit Subcontractor Reporting: Worker Classification Compliance Requirement will constitute non-compliance and may result in cancellation of contract and/or forfeiture of future bidding privileges until resolved.

Send Completed Form to: Office of Purchasing & Contracting
133 State St, 5th Floor
Montpelier, VT 05633