



REQUEST FOR PROPOSALS
For an
Energy Storage Access Program (ESAP)

Version 1

Date Issued: May 19, 2023

Questions Due: June 5, 2023

Proposals Due: June 23, 2023

RFP Website:

<https://publicservice.vermont.gov/requests-proposals/psd-seeks-proposals-distribution-utilities-energy-storage-access-program>

Vermont Public Service Department
112 State Street
Montpelier, Vermont 05620-2601
(802) 828-2811
TTY/TTD (VT): 1-800-734-8390

OVERVIEW

Vermont was awarded \$1.05 billion in Coronavirus State and Local Fiscal Recovery Funds (Recovery Funding) as part of the federal American Rescue Plan Act (ARPA) of 2021. The Governor's Recovery Plan is focused on transparent investments in key infrastructure needs including housing, broadband, wastewater and sewer systems, climate change prevention and mitigation, and economic development. The explicit objective of this Plan is to provide long term economic recovery opportunities to communities statewide, with a focus on those regions or counties struggling the most with job losses and impacts on demographics and income levels.

Sec. G.600(a)(5) of Act 185 of the Vermont General Assembly's 2022 legislative session appropriated a **total of \$7,000,000 of ARPA Recovery Funding** to the Public Service Department (PSD) for, "load management and storage efforts to assist Vermonters with low and moderate income customers to purchase electric equipment for heating, cooling, and vehicle charging. In addition, investments will be made in load control and management platforms to enable smaller municipal and cooperative utilities to capture and share benefits of load management and funding for municipal back-up electricity storage installations."¹

The Energy Storage Access Program (ESAP) will (1) support installation of battery electric storage systems at low- and moderate-income Vermont homes to support their resilience as well as to lower costs for utility ratepayers, (2) support the acquisition by municipal and cooperative utilities of storage management, flexible load management, and/or distributed energy resource management software solutions to manage both batteries and other electric loads; and, (3) support installation of battery electric storage systems at municipal buildings to support community resilience and lower costs for utility ratepayers. This support will run concurrent with existing utility-supported programs addressing heat pumps and EV charging, and with additional ARPA-funded programs to assist low- and moderate-income customers with electrification.

The PSD requests proposals from eligible entities for investments pursuant to Act 185. This Request for Proposals (RFP) outlines the Department's objectives, selection criteria, and proposed funding allocation for each of the three focus areas above.

¹ Act 185 appropriated \$2,000,000 for these purposes and stated, "The same use of funds shall apply to \$5,000,000 of the funds appropriated in 2021 Acts and Resolves No. 74, Sec G.600(a)(5)," making a total of \$7,000,000 available.

PROGRAM SUMMARY, PART 1: LMI STORAGE SYSTEMS

LMI Storage Systems – Program Summary Details	
Recipient Eligibility:	Distribution Utilities (DUs) serving Vermont residents (as lead or co-applicant)
Funding Type:	Program Grant
Approx. Amount Available:	\$4,000,000
Cost Share Required from Grantees:	Low-income customers will be offered systems free of charge or for a nominal charge; moderate-income customers may contribute a cost-share of up to 20%, but this should be calculated based on the utility’s anticipated savings from harvesting the batteries’ capabilities to reduce peak-related and other power supply costs.
Funding Allocation:	Funding allocation: Vermont’s 17 distribution utilities will be awarded funds based on (a) their share of residential electric customers and (b) the extent to which they serve the Objectives
Eligible Projects/Technologies:	Deployment of residential energy storage systems to serve or directly benefit LMI Households

OBJECTIVES

- Maximizing installations of energy storage systems at low- and moderate-income (LMI) households (funding estimated to support approximately 260 residences), with eligible households located in a variety of housing types (e.g., single-family residences, multiunit dwellings, senior-focused housing, etc.)
 - Low-income household qualifying incomes are up to 80% of area median income; medium-income household qualifying income limits range from 80% to 120% of area median income
- Directing at least half of funding to low-income customers through free or nearly-free installations, and the remainder to moderate-income customers with a maximum required cost-share of 20%
 - Nearly-free installations are allowable because some utility programs have faced difficulty recruiting customers due to the perception that a free offering is a worthless product; thus, a nominal charge is allowed (e.g., under \$50, or under \$5 dollars per month)
- Improving access of LMI households to affordable storage lease or rental options
- Improving LMI household resiliency, with a priority on households with critical medical equipment reliant on electricity, and/or customers in areas with frequent outages
- Assisting smaller municipal and cooperative utilities acquire the economic means to manage loads and storage equipment

- Reducing electric system costs to ratepayers through maximizing power supply benefits without sacrificing participating customer resilience
- Reducing carbon emissions through charging when the grid is cleanest and discharging when emissions are highest

SUBMITTING THE PROPOSAL

Proposals must arrive at the Public Service Department (PSD) office by 4 p.m. on June 23, 2023. Proposals can be mailed or emailed. Applicants should allow adequate time to ensure receipt of their proposal by the deadline if mailing in a hard copy. Proposals received after this time and date may be considered subject to the Department’s discretion. Information for what information to be included in the Proposal is below.

Any questions regarding this RFP should be submitted in writing, preferably by email, with the subject line, “ESAP LMI Storage RFP Question.” Questions are due by close of business, June 5, 2023. Responses to questions will and posted on the RFP webpage approximately one week later.

Proposals and questions should be addressed to:

Philip Picotte
Utilities Economic Analyst
Vermont Public Service Department
philip.picotte@vermont.gov

INFORMATION FOR APPLICANTS

Term: The estimated project timeline should be clearly articulated in the proposal. The projects funded under this solicitation should be operational and completed on or before December 31, 2026.

Reporting: Reporting shall be required for all programs receiving an award. Reporting shall include quarterly progress reports as well as a final report submitted within three months of the grant end date or by January 30, 2027, whichever is comes first.

Quarterly reports and a final program 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. Eligible cost-share includes up to 20% of the installed system cost from moderate-income customers receiving installations, and an amount up to, but not greater than, the anticipated savings to ratepayers of dispatching the fleet of installed systems to reduce peak-related (and other power supply) costs. Low-income customers receiving storage systems shall not be charged for the system or its installation (or may be charged a nominal amount), and moderate-income customers shall be offered a lease or rental option with

low monthly payments. 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.

Exclusions: Funds cannot be used for projects that have already begun construction or for equipment purchases that have already been made or ordered.

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.

Terms and Conditions: See the “General Terms and Conditions,” which are applicable to all parts of this solicitation, in Appendix A.

INFORMATION REQUIRED FOR THE INITIAL PROPOSAL

Applicants must submit an electronic copy of the proposal to Philip Picotte at the Vermont Public Service Department. Proposals must arrive prior to the deadline.

Proposals will be reviewed by a project team selected by the Department. Proposals that best meet the objectives for the program selected. See “Evaluation Criteria” for more details.

Proposals 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.

Proposals should be no longer than 10 pages, with no less than a 12-point font and one-inch margins. Appendices (if included) **do not** count toward the 10-page limit. The Summary Page and all other information count towards the 10-page limit. Shorter proposals will not adversely affect the scoring, as long as all requested information is provided.

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

1. **Program Title** - Provide a descriptive title for the program.
2. **Identification of Applicant Organization** - State the full name and address of the Distribution Utility responsible for the Proposal and list the main contact and their contact information. The Distribution Utility may identify a potential subgrantee or contractor/subcontractor but the Distribution Utility must be the authorized negotiator.
3. **Program Description** that shall include, at a minimum:
 - Budget - Simple budget that includes cost share and any other possible funding for the program;

- Expected project timeline;
- Number and percentage of low-income customers and number and percentage of moderate-income customers who will be provided with energy storage installations; and
- Whether the applying utility currently offers a storage lease or rental program or will be offering one for the first time as part of its proposal.

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. Program Narrative, Work Plan, & Timeline

Describe the proposed use of the amount requested. Provide a statement addressing the program’s goal(s) and objectives. Program Narratives shall:

1. Identify the details of the proposed project, including identification of eligible LMI customers (including factors such as presence of critical medical equipment and/or frequent outages), development of a lease or rental program (if applicable), identification of vendors (if known), and plan to ensure safe installations;
2. Identify the proposed timeline for the project development and implementation;
3. Identify the benefits that utility ratepayers may receive from this project, including summary of any cost-effectiveness analysis (full analysis may be included in appendix), and a description of how the utility will achieve those benefits;
4. Identify any barriers or challenges to implementation – including deployment and use of the full suite of storage capabilities – and how they will be addressed;
5. Identify any proposed outreach for the program, including whether, and if so, how outreach will be directed to customers/members that are low-income or otherwise from disadvantaged communities;
6. Define/describe any partnerships between the proposed program and those from other DUs; and
7. Describe the plan for project oversight, quality assurance measures, and financial management, and which team members will have these responsibilities.

C. Budget & Budget Narrative

Provide an estimated budget for the program that includes, at a minimum,

1. Budget line items and amounts that are sufficiently described and justified to explain the necessity of each item, including administrative costs;
2. Cost Share proposal; and
3. Demonstration that costs are reasonable and competitive.

D. Experience & Qualifications of applicant and any sub-grantees (if known):

1. Knowledge and experience in the relevant program area, including successful experience with similar programs; and

2. Demonstrated ability to implement programs on time, on budget, and to complete the reporting requirements.

E. Additional Information

Proposals must include information described in sections A-D above. Proposals can include any other pertinent and important information.

F. Acknowledgment of Terms and Conditions

Proposals must include an acknowledgment and acceptance of the General Terms and Conditions in Appendix A.

METHOD OF AWARD

Awards will be made in the best interest of the State. Proposals will be scored according to the rubric below. A selection committee will review and analyze all submittals based on their response to the information requested. The Department reserves the right to allocate funding according to how well a project meets the Objectives, amount of funding available, or any other criteria the Department deems relevant. At a minimum, the selection process will include the following criteria in the evaluation of proposals.

- Number and percentage of LMI customers provided with energy storage installations (25 points)
- Expedient creation of a storage program where one does not currently exist (20 points)
- Expansion of an existing storage program to be more accessible to LMI customers (10 points)
- Ability of participating moderate-income customers to meet their cost-sharing requirements through a storage lease or rental program at affordable rates (10 points)
- Ability of utility to identify and recruit participating customers with critical medical equipment dependent on electricity (15 points)
- Ability of utility to identify and recruit participating customers in areas with frequent outages (10 points)
- Ratepayer power supply benefits (10 points)

PROGRAM SUMMARY, PART 2: FLM SOFTWARE

FLM Software – Program Summary Details	
Recipient Eligibility:	Municipal or Cooperative Electric Distribution Utilities (DU) serving Vermont Residents
Funding Type:	Program Grant
Approx. Amount Available:	\$2,000,000
Cost Share Required from Grantees:	20%
Funding Allocation:	Funds will be competitively awarded based on the extent to which proposals meet the Objectives.
Eligible Projects/Technologies:	Deployment of Flexible Load Management (FLM) Software (initial costs and subscription fees for up to three years)

OBJECTIVES

- Deployment of Flexible Load Management (FLM) software by municipal and cooperative utilities currently without it
- Use of FLM software to manage energy storage systems in Parts 1 and 3 of this solicitation, and other flexible loads as feasible, to lower costs associated with peaks and explore other potential value streams
- Use of FLM software to expand customer access to shared cost, shared value program offerings for energy storage, and other flexible loads as feasible

SUBMITTING THE PROPOSAL

Proposals must arrive at the Public Service Department (PSD) office by 4 p.m. on June 23, 2023. Proposals can be mailed or emailed. Applicants should allow adequate time to ensure receipt of their proposal by the deadline if mailing in a hard copy. Proposals received after this time and date may be considered subject to the Department’s discretion. Information for what information to be included in the Proposal is below.

Any questions regarding this RFP should be submitted in writing, preferably by email, with the subject line, “ESAP FLM Software RFP Question.” Questions are due by close of business, June 5, 2023. Responses to questions will be posted on the RFP webpage approximately one week later.

Proposals and questions should be addressed to:

Philip Picotte

Utilities Economic Analyst
Vermont Public Service Department
philip.picotte@vermont.gov

INFORMATION FOR APPLICANTS

Term: The estimated project timeline should be clearly articulated in the proposal. The projects funded under this solicitation should be operational and completed on or before December 31, 2026.

Reporting: Reporting shall be required for all programs receiving an award. Reporting shall include quarterly progress reports as well as a final report submitted within three months of the grant end date or by January 30, 2027, whichever is comes first.

Quarterly reports and a final program 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. Eligible cost-share includes at least 20% of the project cost. 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.

Exclusions: Funds cannot be used for projects that have already begun implementation or for software purchases that have already been made or ordered.

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.

Terms and Conditions: See the “General Terms and Conditions,” which are applicable to all parts of this solicitation, in Appendix A.

INFORMATION REQUIRED FOR THE INITIAL PROPOSAL

Applicants must submit an electronic copy of the proposal to Philip Picotte at the Vermont Public Service Department. Proposals must arrive prior to the deadline.

Proposals will be reviewed by a project team selected by the Department. Proposals that best meet the objectives for the program selected. See “Evaluation Criteria” for more details.

Proposals 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.

Proposals should be no longer than 10 pages, with no less than a 12-point font and one-inch margins. Appendices (if included) **do not** count toward the 10-page limit. The Summary Page and all other information count towards the 10-page limit. Shorter proposals will not adversely affect the scoring, as long as all requested information is provided.

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

1. **Program Title** - Provide a descriptive title for the program.
2. **Identification of Applicant Organization** - State the full name and address of the Distribution Utility responsible for the Proposal and list the main contact and their contact information. The Distribution Utility may identify a potential subgrantee or contractor/subcontractor but the Distribution Utility must be the authorized negotiator.
3. **Program Description** that shall include, at a minimum:
 - Budget - Simple budget that includes cost share and any other possible funding for the program,
 - Expected project timeline,
 - Whether the applying utility currently has Flexible Load Management (FLM) software or will be adopting it for the first time as part of its proposal.
 - Anticipated use cases for the FLM software and any interactions with proposals made under Parts 1 or 3 of this RFP.
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. Program Narrative, Work Plan, & Timeline

Describe the proposed use of the amount requested. Provide a statement addressing the program's goal(s) and objectives. Program Narratives shall:

1. Identify the details of the proposed project, including identification of proposed FLM software, proposed applications (e.g., storage-only or including other flexible loads, peak reduction or other value streams), and anticipated benefits to customers adopting storage and other flexible loads (e.g., access to shared-cost, shared-value programs);
2. Identify the proposed timeline for the project development and implementation;
3. Identify the benefits that utility ratepayers may receive from this project, including summary of any cost-effectiveness analysis (full analysis may be included in appendix), and a description of how the utility will achieve those benefits;
4. Identify any barriers or challenges to implementation – including deployment and use of the full suite of FLM software capabilities – and how they will be addressed;
5. Define/describe any partnerships between the proposed program and those from other DUs, and

6. Describe the plan for project oversight, quality assurance measures, and financial management, and which team members will have these responsibilities.

C. Budget & Budget Narrative

Provide an estimated budget for the program that includes, at a minimum,

1. Budget line items and amounts that are sufficiently described and justified to explain the necessity of each item, including administrative costs
2. Cost Share proposal,
3. Demonstration that costs are reasonable and competitive

D. Experience & Qualifications of applicant and any sub-grantees (if known):

1. Knowledge and experience in the relevant program area, including successful experience with similar programs
2. Demonstrated ability to implement programs on time, on budget, and to complete the reporting requirements

E. Additional Information

Proposals must include information described in sections A-D above. Proposals can include any other pertinent and important information.

F. Acknowledgment of Terms and Conditions

Proposals must include an acknowledgment and acceptance of the General Terms and Conditions in Appendix A.

METHOD OF AWARD

Awards will be made in the best interest of the State. Proposals will be scored according to the rubric below. A selection committee will review and analyze all submittals based on their response to the information requested. The Department reserves the right to allocate funding according to how well a project meets the Objectives, amount of funding available, or any other criteria the Department deems relevant. At a minimum, the selection process will include the following criteria in the evaluation of proposals.

- Deployment of FLM software by a utility without existing flexible load management capabilities, including at least direct management of energy storage systems (25 points)
- Deployment of FLM software to manage multiple types of flexible loads from multiple manufacturers or vendors (20 points)
- Use of FLM software to lower peak-related costs and capture other benefits to ratepayers (15 points)

- Use of FLM software to expand customer access to shared-cost, shared-value offerings for energy storage and other flexible loads (15 points)
- Deployment of FLM software in conjunction with an application under Parts 1 or 3 of this RFP (10 points)
- Plan for sustainable deployment of FLM software (15 points)

PROGRAM SUMMARY, PART 3: MUNICIPAL STORAGE SYSTEMS

Municipal Storage Systems – Program Summary Details	
Recipient Eligibility:	Distribution Utilities (DUs) serving Vermont residents (as lead or co-applicant)
Funding Type:	Program Grant
Approx. Amount Available:	\$1,000,000
Cost Share Required from Grantees:	Distribution utilities and/or the municipalities receiving grants should provide no less than 10%, and preferably up to 20%, of the project cost.
Funding Allocation:	Funding allocation: funds will be awarded to one entity (subgrantees allowable) coordinating the installation of at least one municipal storage project in the service territory of each participating distribution utility. Applications will be evaluated based on the extent to which they serve the Objectives.
Eligible Projects/Technologies:	Deployment of Energy Storage Systems at Municipal Buildings

OBJECTIVES

- Deployment of at least one municipal energy storage system in the service territory of each participating distribution utility.
- Prioritizing installations in municipal buildings that: (a) serve as emergency shelters and warming/cooling centers; (b) are in areas with frequent outages; (c) serve low-income populations; and (d) do not already have a backup power system or are replacing an end-of-life fossil fuel backup power system
- As part of participant recruitment, include communities where battery storage is recommended for implementation through the building energy assessments conducted under the Department of Building and General Service’s Municipal Energy Resilience Program.
- Coordination with utilities to optimize the siting and dispatch of storage systems to maximize benefits to utility ratepayers without diminishing the resilience benefits to the municipality.

SUBMITTING THE PROPOSAL

Proposals must arrive at the Public Service Department (PSD) office by 4 p.m. on June 23, 2023. Proposals can be mailed or emailed. Applicants should allow adequate time to ensure receipt of their proposal by the deadline if mailing in a hard copy. Proposals received after this time and date may be considered subject to the Department’s discretion. Information for what information to be included in the Proposal is below.

Any questions regarding this RFP should be submitted in writing, preferably by email, with the subject line, “ESAP Municipal Storage RFP Question.” Questions are due by close of business, June 5. Responses to questions will be posted on the RFP webpage approximately one week later.

Proposals and questions should be addressed to:

Philip Picotte
Utilities Economic Analyst
Vermont Public Service Department
philip.picotte@vermont.gov

INFORMATION FOR APPLICANTS

Term: The estimated project timeline should be clearly articulated in the proposal. The projects funded under this solicitation should be operational and completed on or before December 31, 2026.

Reporting: Reporting shall be required for all programs receiving an award. Reporting shall include quarterly progress reports as well as a final report submitted within three months of the grant end date or by January 30, 2027, whichever is comes first.

Quarterly reports and a final program 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, which can come from participating municipalities, participating utilities, and/or another source. That cost-sharing should be indicated in the application. Eligible cost-share includes at least 10% and up to 20% of the installed system costs. 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 a municipality or utility to provide funds that cover part of the cost for the project, the applicant must provide a copy of the commitment letter.

Exclusions: Funds cannot be used for projects that have already begun construction or for equipment purchases that have already been made or ordered.

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.

Terms and Conditions: See the “General Terms and Conditions,” which are applicable to all parts of this solicitation, in Appendix A.

INFORMATION REQUIRED FOR THE INITIAL PROPOSAL

Applicants must submit an electronic copy of the proposal to Philip Picotte at the Vermont Public Service Department. Proposals must arrive prior to the deadline.

Proposals will be reviewed by a project team selected by the Department. Proposals that best meet the objectives for the program selected. See “Evaluation Criteria” for more details.

Proposals 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.

Proposals should be no longer than 10 pages, with no less than a 12-point font and one-inch margins. Appendices (if included) **do not** count toward the 10-page limit. The Summary Page and all other information count towards the 10-page limit. Shorter proposals will not adversely affect the scoring, as long as all requested information is provided.

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

1. **Program Title** - Provide a descriptive title for the program.
2. **Identification of Applicant Organization** - State the full name and address of the organization responsible for the Proposal and list the main contact and their contact information. The Distribution Utility may identify a potential subgrantee or contractor/subcontractor but the Distribution Utility must be the authorized negotiator.
3. **Program Description** that shall include, at a minimum:
 - Budget - Simple budget that includes cost share and any other possible funding for the program,
 - Expected project timeline,
 - Number of municipalities or sites anticipated to be served, number of utility service territories in which energy storage systems are anticipated to be sited, and approximate aggregate capacity and duration of storage systems anticipated to be installed; and
 - Recruitment strategy to optimize for the Objectives of this RFP.
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. Program Narrative, Work Plan, & Timeline

Describe the proposed use of the amount requested. Provide a statement addressing the program’s goal(s) and objectives. Program Narratives shall:

1. Identify the details of the proposed project, including identification of eligible municipal buildings (if known), coordination with distribution utilities, identification of vendors (if known), assurance of cost-share, and plan to ensure safe installations;
2. Identify the proposed timeline for the project development and implementation;
3. Identify the benefits that utility ratepayers may receive from this project, including summary of any cost-effectiveness analysis (full analysis may be included in appendix), and a description of how the utility will achieve those benefits;
4. Identify the benefits participating municipalities may receive from this project, including any resilience valuation methodology (full analysis may be included in appendix), and a description of how the municipality will achieve those benefits;
5. Identify any barriers or challenges to implementation – including deployment and use of the full suite of storage capabilities – and how they will be addressed;
6. Identify any proposed outreach for the program, including whether, and if so, how outreach will be directed to municipalities that have received storage assessments through the Municipal Energy Resilience Program and that serve low-income or disadvantaged communities; and
7. Describe the plan for project oversight, quality assurance measures, and financial management, and which team members will have these responsibilities.

C. Budget & Budget Narrative

Provide an estimated budget for the program that includes, at a minimum,

1. Budget line items and amounts that are sufficiently described and justified to explain the necessity of each item, including administrative costs;
2. Cost Share proposal; and
3. Demonstration that costs are reasonable and competitive.

D. Experience & Qualifications of applicant and any sub-grantees (if known):

1. Knowledge and experience in the relevant program area, including successful experience with similar programs; and
2. Demonstrated ability to implement programs on time, on budget, and to complete the reporting requirements.

E. Additional Information

Proposals must include information described in sections A-D above. Proposals can include any other pertinent and important information.

F. Acknowledgment of Terms and Conditions

Proposals must include an acknowledgment and acceptance of the General Terms and Conditions in Appendix A.

METHOD OF AWARD

Awards will be made in the best interest of the State. Proposals will be scored according to the rubric below. A selection committee will review and analyze all submittals based on their response to the information requested. The Department reserves the right to allocate funding according to how well a project meets the Objectives, amount of funding available, or any other criteria the Department deems relevant. At a minimum, the selection process will include the following criteria in the evaluation of proposals.

- Number of municipalities anticipated to be served, number of utility service territories in which energy storage systems are anticipated to be sited, and approximate aggregate capacity and duration of storage systems anticipated to be installed (25 points)
- Proportion of installations in municipal buildings that (a) serve as emergency shelters and warming/cooling centers; (b) are in areas with frequent outages; (c) serve low-income populations; and (d) do not already have a backup power system or are replacing an end-of-life fossil fuel backup power system (30 points)
- Recruitment of communities where battery storage is recommended for implementation through the building energy assessments conducted under the Department of Building and General Service's Municipal Energy Resilience Program (20 points)
- Coordination with the distribution utility to optimize the siting and dispatch of storage systems to maximize benefits to utility ratepayers without diminishing the resilience benefits to the municipality (25 points)

GENERAL TERMS AND CONDITIONS

1. Projects funded through this RFP must comply with Section 106 of the National Historic Preservation Act. 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 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, thermal energy measures and residential stove and 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:
 - a. Workers Compensation: With respect to all operations performed, the awardee shall carry workers' compensation insurance in accordance with the laws of the State of Vermont.

- b. *General Liability and Property Damage*: With respect to all operations performed under the grant, the awardee shall carry general liability insurance having all major divisions of coverage including, but not limited to:
 - c. Premises - Operations
 - d. Products and Completed Operations
 - e. Personal Injury Liability
 - f. Contractual Liability
 - g. The policy shall be on an occurrence form and limits shall not be less than:
 - h. \$1,000,000 per Occurrence
 - i. \$1,000,000 General Aggregate
 - j. \$1,000,000 Products/Completed Operations Aggregate
 - k. \$ 50,000 Fire/ Legal/Liability
 - l. *Automotive Liability*: The awardee shall carry automotive liability insurance covering all motor vehicles, including hired and non-owned coverage, used in connection with the Agreement. Limits of coverage shall not be less than: \$1,000,000 combined single limit.
 - m. 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.
11. All funding for contract awards will be federal American Recovery Plan Act (ARPA) funds; therefore, all ARPA fund requirements and restrictions will apply.