

State of Maine
Master Score Sheet

RFP# 202408156					
Energy Efficiency Planning for Rural Communities					
Bidder Name:		Cadmus	Glumac	John Turner Consulting	NORESCO
Proposed Cost:		\$673,525	\$1,138,000	\$1,373,831	\$959,919
Scoring Sections	Points Available				
Section I: Preliminary Information	N/A	N/A	N/A	N/A	N/A
Section II: Organization Qualifications and Experience	35	31	27	27	26
Section III: Proposed Services	40	27	32	10	37
Section IV: Cost Proposal	25	22	13	11	15
TOTAL	<u>100</u>	<u>80</u>	<u>72</u>	<u>48</u>	<u>78</u>
Bidder Name:		Power Options			
Proposed Cost:		\$580,900			
Scoring Sections	Points Available				
Section I: Preliminary Information	N/A	N/A			
Section II: Organization Qualifications and Experience	35	29			
Section III: Proposed Services	40	30			
Section IV: Cost Proposal	25	25			
TOTAL	<u>100</u>	<u>84</u>			

Award Justification Statement
RFP# 202408156
Energy Efficiency Planning for Rural Communities

I. Summary

The State of Maine sought proposals for a qualified consultant to support up to 20 Maine communities with high climate vulnerabilities to assess energy use in their public buildings and develop energy conservation implementation plans. The consultant will be expected to complete four tasks: (A) provide energy audits for a selection of public buildings in each of the communities; (B) train staff in the communities on the use of the EnergyStar Portfolio Manager and assist them with entering information for their buildings; (C) develop for each of the communities an Energy Conservation Implementation Plan that provides each community with a detailed list of energy efficiency projects that the community can then implement with Maine Community Resilience Partnership grant funds or other funding opportunities; and (D) develop a guidebook for energy efficiency and conservation in public buildings that is practical for low-capacity rural communities across Maine and provides instruction for internally assessing municipal energy use and prioritizing projects for implementation.

II. Evaluation Process

Members of the Evaluation Team included staff from the Governor’s Office of Policy Innovation and the Future and the Governor’s Energy Office, with experience in building energy audits, benchmarking, and technical assistance programs for communities. Proposals were reviewed individually by members of the Team, then reviewed and scored by the Team during sessions on November 14th and 18th and December 1st, 2024.

III. Qualifications & Experience

The conditionally awarded bidder scored higher as a result of the following Qualification and Experience factors:

1. Experience providing relevant services—including audits, benchmarking, and planning—for municipalities, schools, and public institutions, including those located in and around New England.
2. Experience providing building audits across ASHRAE Levels I, II, and III.
3. Experience developing plans around energy efficiency and electrification for municipalities, with a working knowledge of federal funding and state funding.
4. Identification of subcontractors with appropriate certifications to provide in-person audits throughout the state.

IV. Proposed Services

The conditionally awarded bidder scored higher as a result of the following Proposed Services:

1. Provide energy audits on publicly owned buildings in Maine communities, including a thorough preliminary pre-audit analysis, ASHRAE Level II considerations, safety considerations, blower door testing, IR imaging, the installation of data loggers, and post-audit analysis of important energy efficiency and use metrics.
2. Train communities on EnergyStar Portfolio Manager through an approach that focuses on addressing the needs of low-capacity communities and included direct account setup and performing benchmarking on behalf of the communities, developing a custom curriculum to provide direct trainings to each community, and providing ongoing support.
3. Develop Energy Conservation Implementation Plans for communities through a combination of desktop analyses and audit results to provide a prioritized list of Energy Control Procedures, the development of an appropriate length report, providing 1-on-1 presentations to the communities, and the incorporation of rebates and tax credits into the funding plans, with the additional value of including solar siting as part of the implementation plan.
4. Develop an Energy Efficiency and Conservation Guidebook tailored to the needs of non-participating communities, which builds upon the learnings from previous tasks and includes instructions to the State on how to update the guidebook over time.

V. Cost Proposal

With guidance from Procurement staff, the RFP coordinator provided all bidders with an amended cost proposal form, which helped facilitate the evaluation of cost proposals in a manner that allowed for a direct and fair comparison in terms of number of communities and number of buildings.

The conditionally awarded bidder had the lowest cost among the bidders when comparing the amended cost proposals.

VI. Conclusion

The Evaluation Team selected the highest combined scoring proposal from the pool of bidders. Of all the bidders, the Evaluation Team determined that the conditionally awarded bidder had the strongest combination of qualifications and experience, proposed services, and costs.



STATE OF MAINE
Governor's Office of Policy Innovation
and the Future

Janet T. Mills
Governor

Hannah Pingree
Director

AWARD NOTIFICATION LETTER

December 20, 2024

Andrew Machado
The Cadmus Group LLC
800 N Glebe Rd, Suite 500
Arlington, VA 22203

SUBJECT: Notice of Conditional Contract Award under RFP # 202408156,
Energy Efficiency Planning for Rural Communities

Dear Andrew Machado:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Governor's Office of Policy Innovation and the Future for Energy Efficiency Planning for Rural Communities. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

- PowerOptions

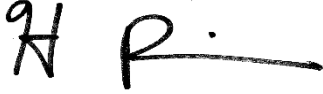
The bidder listed above received the evaluation team's highest ranking. The Department will be contacting the aforementioned bidder soon to negotiate a contract. As provided in the RFP, the Notice of Conditional Contract Award is subject to execution of a written contract and, as a result, this Notice does NOT constitute the formation of a contract between the Department and the apparent successful vendor. The vendor shall not acquire any legal or equitable rights relative to the contract services until a contract containing terms and conditions acceptable to the Department is executed. The Department further reserves the right to cancel this Notice of Conditional Contract Award at any time prior to the execution of a written contract.

As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

This award decision is conditioned upon final approval by the State Procurement Review Committee and the successful negotiation of a contract. A Statement of Appeal Rights has been provided with this letter; see below.

Thank you for your interest in doing business with the State of Maine.

Sincerely,

A handwritten signature in black ink, appearing to read "H P.", with a horizontal line extending to the right from the end of the "P".

Hannah Pingree
Director, Governor's Office of Policy Innovation and the Future

STATEMENT OF APPEAL RIGHTS

Any person aggrieved by an award decision may request an appeal hearing. The request must be made to the Director of the Bureau of General Services, in writing, within 15 days of notification of the contract award as provided in 5 M.R.S. § 1825-E (2) and the Rules of the Department of Administrative and Financial Services, Bureau of General Services, Office of State Procurement Services [formerly the Division of Purchases], Chapter 120, § (2) (2).



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AWARD NOTIFICATION LETTER

December 20, 2024

Brad Miller
Glumac
100 Montgomery St #2050
San Francisco, CA 94104

SUBJECT: Notice of Conditional Contract Award under RFP # 202408156,
Energy Efficiency Planning for Rural Communities

Dear Brad Miller:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Governor's Office of Policy Innovation and the Future for Energy Efficiency Planning for Rural Communities. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

- PowerOptions

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Sincerely,

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Hannah Pingree
Director, Governor's Office of Policy Innovation and the Future

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AWARD NOTIFICATION LETTER

December 20, 2024

Alan Rogers
John Turner Consulting, Inc.
136 Maine Avenue
Bangor, ME 04401

SUBJECT: Notice of Conditional Contract Award under RFP # 202408156,
Energy Efficiency Planning for Rural Communities

Dear Alan Rogers:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Governor's Office of Policy Innovation and the Future for Energy Efficiency Planning for Rural Communities. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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Thank you for your interest in doing business with the State of Maine.

Sincerely,

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Hannah Pingree
Director, Governor's Office of Policy Innovation and the Future

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Hannah Pingree
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AWARD NOTIFICATION LETTER

December 20, 2024

Joh Balfe
NORESKO, LLC
1 Research Dr, Suite 400C
Westborough, MA 01581

SUBJECT: Notice of Conditional Contract Award under RFP # 202408156,
Energy Efficiency Planning for Rural Communities

Dear John Balfe:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Governor's Office of Policy Innovation and the Future for Energy Efficiency Planning for Rural Communities. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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Hannah Pingree
Director, Governor's Office of Policy Innovation and the Future

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Hannah Pingree
Director

AWARD NOTIFICATION LETTER

December 20, 2024

Erin Camp
PowerOptions
129 South Street, 6th Floor
Boston, MA 02111

SUBJECT: Notice of Conditional Contract Award under RFP # 202408156,
Energy Efficiency Planning for Rural Communities

Dear Erin Camp:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Governor's Office of Policy Innovation and the Future for Energy Efficiency Planning for Rural Communities. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156
RFP TITLE: Energy Efficiency Planning for Rural Communities
BIDDER: Cadmus
DATE: 11/14/2024

SUMMARY PAGE

Department Name: Governor’s Office of Policy Innovation and the Future
Name of RFP Coordinator: Casey Zorn
Names of Evaluators: Casey Zorn, Brian Ambrette, Ross Anthony

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	31
Section III. Proposed Services	40	27
Section IV. Cost Proposal	25	22
<u>Total Points</u>	<u>100</u>	<u>80</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: Cadmus

DATE: 11/14/2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

-provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156
RFP TITLE: Energy Efficiency Planning for Rural Communities
BIDDER: Cadmus
DATE: 11/14/2024

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	31

Evaluation Team Comments:

I. Overview of the Organization

- Cadmus
 - Andrew Machado - Experience with larger commercial and industrial buildings in the last two years
 - Elissa Slocum – Based in Maine and has worked with community stakeholders and other states for 11 years
 - Cadmus was GOPIF’s consultant on the Clean Transportation Roadmap
 - Cadmus will direct the consultant team and lead the individual tasks
 - Example Projects
 - Arlington County
 - Relevant project experience, including a level 1 energy audit and stakeholder engagement
 - Power BI decision making tool
 - Efficiency Maine
 - Less relevant to the scope of work
 - Cx project for *Vermont Buildings and General Services*
 - Very relevant to the scope of work
 - Level I and II energy audits for municipal buildings in Montpelier
 - Ongoing audits for 50 municipal buildings across the state
 - Envelope, HVAC, lighting, battery storage potential, EV charging potential, onsite renewable potential

II. Subcontractors

- Bennett Engineering
 - Efficiency Maine qualified partner
 - 40 years relevant experience
 - Industrial, commercial, institutional, and community owned buildings
- Cx Associates
 - Energy engineering firm
 - Performed close to 100 energy audits across norther New England
 -

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: Cadmus

DATE: 11/14/2024

- Energy Audits Ltd
 - Efficiency Maine qualified partner
 - More than a dozen energy audits in Maine, including agricultural buildings, nonprofits, and multi-family buildings
- Partners have a range of firm sizes and building types that are relevant to the scope of work

III. Organizational Chart

- Reasonable project management team and structure
- Primary point of contact is in state and has over 10 years of relevant experience
 - Says that Elissa Slocum will be State of Maine's primary contact but Andrew Machado, the Principal Investigator, is listed as the contact on the cover page
 - Need confirmation of correct POC
- Bennett and Cx staff will support in person site visits for the energy audits
 - Bennett will focus on electrical systems
 - Cx is focused on building envelope issues
- Energy Audits Ltd will support audits as needs as well as the development of the implementation plans

IV. Litigation

- No litigation in the past 5 years

V. Financial Viability

- Cadmus is in good standing. No delinquent accounts or defaults.

VI. Licensure/Certification

- Provided

VII. Certificate of Insurances

- Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156
RFP TITLE: Energy Efficiency Planning for Rural Communities
BIDDER: Cadmus
DATE: 11/14/2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	40	27

Evaluation Team Comments:

I. Services to be Provided

- *A. Provide Energy Audits on Publicly Owned Buildings in Maine Communities*
 - *20 audit reports, proposing 12 of standard rigor, 5 of enhanced rigor, and 3 remote standard rigor audits*
 - *That’s about half of what would be needed*
 - *Their standard rigor audits would be Level I one-day audits, led by Bennett*
 - *Enhanced audits would include exterior envelope (blower door or thermal imaging), combustion analysis, renewables feasibility, building controls trend analysis, led by Cx Associates*
 - *Appreciate budget strategy for communities within one-day travel versus remote communities*
 - *Plan work in four waves, with each wave lasting several months, to accommodate staggered onboarding*
- *B. Train Communities on EnergyStar Portfolio Manager*
 - *10 webinar training sessions for 10 participating communities, 90 minutes each, Cadmus with Cx*
 - *1-on-1 trainings with each community*
 - *Cadmus has experience with providing customer support for Portfolio Manager*
 - *Approach does not address a potential lack of tech literacy among municipal staff, and the lack of manual entry training may not align with needs of participating communities.*
 - *Does not provide ongoing support.*
 - *Will a single 90-minute session per community be enough support to ensure complete benchmarking for all participating buildings?*
- *C. Develop Energy Conservation Implementation Plans for Communities*
 - *Cadmus will lead with Energy Audits Ltd and Bennett providing pricing support*
 - *Economic Analysis will prioritize working with local contractors to get accurate timely local pricing, relying on RSMeans as backup for pricing*

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: Cadmus

DATE: 11/14/2024

- *GHG Analysis will use EPA tools and include Scope 2 but not Scope 3 emissions*
- *Providing funding and incentives sources*
- *Would benefit from more detail on the final implementation plan deliverable, such as length and formatting.*

- *D. Develop an Energy Efficiency and Conservation Guidebook*
 - *Cadmus will develop Guidebook and companion presentation*
 - *Offering option of a program dashboard*
 - *This section did not include a lot of detail and did not display a clear understanding of the task or expected deliverables*

- *E. Submit Quarterly and Final Performance Reports*
 - *Has experience with EECEBG for Boston and Providence. Demonstrates understanding of PAGE and EECEBG federal reporting.*
 - *Monthly meetings with stakeholders*

- II. Implementation – Work Plan*
 - *Reasonable work plan*
 - *Timeline is detailed and includes leads for each task*

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: Cadmus

DATE: 11/14/2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
580,900	,	673,525	x	25 points	=	22

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156
RFP TITLE: Energy Efficiency Planning for Rural Communities
BIDDER: Glumac
DATE: 11/14/2024

SUMMARY PAGE

Department Name: Governor’s Office of Policy Innovation and the Future
Name of RFP Coordinator: Casey Zorn
Names of Evaluators: Casey Zorn, Brian Ambrette, Ross Anthony

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
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Section IV. Cost Proposal	25	13
<u>Total Points</u>	<u>100</u>	<u>72</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: Glumac

DATE: 11/14/2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

-provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156
RFP TITLE: Energy Efficiency Planning for Rural Communities
BIDDER: Glumac
DATE: 11/14/2024

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	27

Evaluation Team Comments:

I. Overview of the Organization

- Glumac
 - National and local presence, office in Portland, ME (one team member in Maine)
 - Subsidiary of Tetra Tech, acting as Subcontractor
- Projects/Experience:
 - Good portfolio of energy audit programs across wide range of different climates
 - Maine experience: National Guard, universities, larger Maine municipalities
 - City of Los Angeles Existing Decarbonization Work Plan
 - Large scale audit project, over 1,000 buildings
 - George Mason University Energy Efficiency and Resilience Action Plan
 - 9 million square feet, large scale
 - City of San Luis Obispo Carbon Neutral Plan
 - 30 buildings (similar in scale to this RFP project)
 - Includes energy audits

II. Subcontractors

- Tetra Tech (parent company) and Consentini (sister company)
 - Providing some subject matter expertise and energy engineering support
 - Need further detail on Consentini
- MGAC
 - Primary cost estimator services

III. Organizational Chart

- Reasonable and well thought out
- 2 managers
 - Would benefit from more information on differentiation between program manager and project manager

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: Glumac

DATE: 11/14/2024

- Energy planning, energy auditors, Subject Matter Experts

IV. Litigation

- GLUMAC has no litigation; however, Tetra Tech, the parent company and subcontractor, has some ongoing litigation. Says this will not have material effect on financial position.

V. Financial Viability

- Provided

VI. Licensure/Certification

- Provided

VII. Certificate of Insurances

- Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156
RFP TITLE: Energy Efficiency Planning for Rural Communities
BIDDER: Glumac
DATE: 11/14/2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	40	32

Evaluation Team Comments:

- *Services to be Provided*
 - *A. Provide Energy Audits on Publicly Owned Buildings in Maine Communities*
 - *Have provided ASHRAE Level I, II, and III. Expect mix of Level I and Level II for this project.*
 - *Detailed review of energy data and considering existing conditions*
 - *Onsite building walkthrough*
 - *Energy efficiency*
 - *Energy conservation*
 - *Electrification*
 - *Clean energy*
 - *Building envelope review with thermal imaging*
 - *Demonstrates understanding of 2-6 buildings for audit within each community*
 - *Clear and reasonable deliverables, including existing conditions summary*
 - *B. Train Communities on EnergyStar Portfolio Manager*
 - *Based on cost proposal, might be under assumption that they are helping with EnergyStar Portfolio trainings for all municipal buildings for each community instead of just the 2-6 identified buildings. Same for Task C.*
 - *Has experience with Portfolio Manager for energy audits at public facilities*
 - *Step by step training sessions*
 - *Account setup, building setup, data input, data analysis*
 - *Does not address the format for these sessions, in-person vs online, etc.*
 - *Assistance could include: help desk, hands on training*
 - *QA/QC for the communities*
 - *Will record and make available for public publishing*
 - *C. Develop Energy Conservation Implementation Plans for Communities*
 - *Task C, like Task B, seems to include all municipal buildings in each community instead of 2-6 per community. How will aligning with this expectation change the cost estimate and scope of services?*

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: Glumac

DATE: 11/14/2024

- *Includes community engagement*
- *Aligns MWW climate action goals and community priorities*
- *Data collection supports the development of a prioritized list*
- *Demonstrates understanding of available Efficiency Maine rebates*
- *MGAC will support development of project budgets and ROM cost estimates*
 - *How will MGAC's services flow down to project deliverables?*
- *Uses a lot of tech, not sure this is the best option for low capacity rural communities. This will require a lot of additional training for these communities and may be too bespoke.*

- *D. Develop an Energy Efficiency and Conservation Guidebook*
 - *Thoughtful approach, considers user friendly design*
 - *Engage communities to solicit feedback*
 - *Develop interactive dashboard*
 - *Reasonable process*
 - *Includes the structure included in the RFP, but expands upon the different analyses, including electrification, clean energy and resilience, and community resilience*
 - *Includes period of review by GOPIF and communities.*

- *E. Submit Quarterly and Final Performance Reports*
 - *Says they will submit reports 5 days before the 30th of the month. This is not sufficient time for GOPIF's federal reporting deadlines.*
 - *Thorough review process for final report*
 - *Does not demonstrate experience with federal reporting. Will rely upon Tetra Tech's reporting platform.*

- *Includes list of assumptions*
 - *Notes that costs could expand*

- *Implementation – Work Plan*
 - *Lacking in detail in terms of each task*
 - *Project timeline uses full extent of timeline, with no cushion in case of delays*
 - *Second wave of communities ends too late in the process*
 -

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: Glumac

DATE: 11/14/2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
580,900	,	1,138,000	x	25 points	=	13

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: John Turner Consulting, Inc.

DATE: 11/18/2024

SUMMARY PAGE

Department Name: Governor's Office of Policy Innovation and the Future

Name of RFP Coordinator: Casey Zorn

Names of Evaluators: Casey Zorn, Brian Ambrette, Ross Anthony

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	27
Section III. Proposed Services	40	10
Section IV. Cost Proposal	25	11
<u>Total Points</u>	<u>100</u>	<u>48</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: John Turner Consulting, Inc.

DATE: 11/18/2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

-Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: John Turner Consulting, Inc.

DATE: 11/18/2024

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	27

Evaluation Team Comments:

I. Overview of the Organization

- John Turner Consulting, Inc.
- In business for about 30 years
- 140 professionals
- Offices in Bangor and Lisbon, ME, good geographic distribution to support services
- Provide services consistent with RFP
- Projects/Experience
 - Municipal Energy Resilience Program
 - Audits for 41 buildings across 23 communities in Vermont
 - Would benefit from more detail on size of buildings and other details
 - Provided 3 communities that were supported as part of this program
 - Historical usage, energy systems, EUIs, payback period, cost estimates
 - Fire stations, municipal buildings, wastewater treatment facilities and other buildings that align with the RFP

II. Subcontractors

- None

III. Organizational Chart

- Provided simple organization chart, no subcontractors
- Would benefit from more detail on how each of these team members will be involved in this project, including the technical team and subject matter experts

IV. Litigation

- None

V. Financial Viability

- Included in Appendix A

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: John Turner Consulting, Inc.

DATE: 11/18/2024

VI. Licensure/Certification

- Provided

VII. Certificate of Insurances

- Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: John Turner Consulting, Inc.

DATE: 11/18/2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	40	10

Evaluation Team Comments:

I. Services to be Provided

- *Would benefit from more detail overall*
- *A. Provide Energy Audits on Publicly Owned Buildings in Maine Communities*
 - *Does not define rigor/level of the audit, how they will cover audits across the state, who will complete the audits*
 - *Mention inclusion of blower door test, infrared thermography, and combustion analyzers*
 - *Mention comprehensive data collection, including building characteristics, energy consumption patterns, occupancy schedules, and equipment specs*
 - *Mentions in depth system analysis, including HVAC, lighting, building envelope, water heating*
- *B. Train Communities on EnergyStar Portfolio Manager*
 - *Would benefit from more detailed explanation of experience with EnergyStar Portfolio Manager*
 - *Do not provide any specifics around how many trainings, what the trainings will cover, how the trainings will be developed, the size of the groups for trainings, GOPIF feedback, materials that will be provided to the communities*
 - *Does not provide a plan for how benchmarking will be supported for the 2-6 buildings, such as specific support with data and building input*
- *C. Develop Energy Conservation Implementation Plans for Communities*
 - *Discusses cost estimation, however, does not discuss specific available financial levers such as tax credits or rebates*
 - *Does not discuss what tools will be used for the analyses (including greenhouse gas emissions analyses, cost estimating, etc.)*
 - *Would benefit from more detail on past experience with the development of in-depth energy conservation implementation plans and competency with developing such a plan*
 - *Supervision Task does not align with the RFP tasks*

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: John Turner Consulting, Inc.

DATE: 11/18/2024

- *Value add of integrated clean energy and electrification planning (solar, battery storage, EV charging)*

- *D. Develop an Energy Efficiency and Conservation Guidebook*
 - *How is this going to be usable to non-participating communities*
 - *Will develop template and tools. Would benefit from more detail on what this might include or examples of potential tools.*
 - *Inclusion of case studies*
 - *Maintenance plan for guidebook included*
 - *Would benefit from reasoning and plan behind usability testing.*

- *E. Submit Quarterly and Final Performance Reports*
 - *This is not addressed*

II. Implementation – Work Plan

- *Provided but lacking in detail*
- *Included 2 JTC teams, but don't identify why*
- *Work plan does not align with tasks. In work plan, includes the development of an interactive dashboard, but this is not discussed in the proposed services section. Does not include experience doing such as project or what the benefit would be.*
- *Would appreciate a more thoughtful approach to scheduling.*
- *Includes 4 cohorts, but does not explain reasoning behind this.*
- *Diagram for schedule is unclear.*
- *Provide decent time buffer to complete tasks before end of project date*

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: John Turner Consulting, Inc.

DATE: 11/18/2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
580,900	,	1,373,831	x	25 points	=	11

Evaluation Team Comments:

- Do not include assumptions in cost proposal.
- In original cost proposal, all tasks are provided on a per community basis, which does not align with Tasks D and E
- Task E, which includes no explanation in the proposed services, is quoted at their most expensive task.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156
RFP TITLE: Energy Efficiency Planning for Rural Communities
BIDDER: NORESCO
DATE: 11/18/2024

SUMMARY PAGE

Department Name: Governor’s Office of Policy Innovation and the Future
Name of RFP Coordinator: Casey Zorn
Names of Evaluators: Casey Zorn, Brian Ambrette, Ross Anthony

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	26
Section III. Proposed Services	40	37
Section IV. Cost Proposal	25	15
<u>Total Points</u>	<u>100</u>	<u>78</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: NORESCO

DATE: 11/18/2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

-provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: NORESCO

DATE: 11/18/2024

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	26

Evaluation Team Comments:

I. Overview of the Organization

- Direct subsidiary of Carrier
- Qualifications statement is generalized and does not reflect the RFP
 - The applicant’s frequent framing of “decarbonization” is not consistent with the RFP’s framing on energy efficiency and is unlikely to resonate with rural communities
 - Benchmarking focused on ordinances, which does not align with RFP
 - Handbook section focuses on technical audiences instead of small town administrators
 - Example Project 1 (ASHRAE Decarbonization Guide) appears adjacent to scope of work but does not provide details on services provided. Technical experience but not related to direct experience with communities.
 - Projects 2 (Texas State Energy Conservation Office – Statewide Energy Audits) and 3 (New York Department of Design and Construction) appear relevant to scope of work but would benefit from detail on the applicant’s role and the services provided

II. Subcontractors

- Northeast Energy Efficiency Partnerships, Inc (NEEP)
 - NORESCO project manager Balfe worked for NEEP until 2023
 - Michael Anderson, Senior Manager, Community Solutions (NEEP)
 - NEEP has experience with cold climate heat pumps, VRF technology, etc (NEEP has deep understanding of the energy landscape in the Northeast, particularly New England, and has a strong background in community engagement).

III. Organizational Chart

- Identifies key project team members and subject matter experts
- Unclear where the project team is located and what team member specific roles will be
- Would benefit from more information on the NEEP team

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: NORESCO

DATE: 11/18/2024

IV. Litigation

- As a national energy services and construction company, NORESCO is, from time to time, involved in litigation in the ordinary course of its business. NORESCO has no past or present litigation which, if decided adversely, would impair NORESCO's ability to perform the services described in this RFP.

V. Financial Viability

- Provided

VI. Licensure/Certification

- Provided

VII. Certificate of Insurances

- Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156
RFP TITLE: Energy Efficiency Planning for Rural Communities
BIDDER: NORESCO
DATE: 11/18/2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	40	37

Evaluation Team Comments:

I. Services to be Provided

- *A. Provide Energy Audits on Publicly Owned Buildings in Maine Communities*
 - *Walk through level assessments with instantaneous measurements*
 - *As required, will perform more depth audit measures*
 - *Would benefit from identifying Level II in this section (notes ASHRAE level II audit later in proposal)*
 - *Unclear for how many audits this additional level of auditing is expected and how that was incorporated into the pricing*
 - *Energy savings accuracy +/- 20%*
 - *Using RSMeans for cost data*
 - *Identify 9 steps for Task A*
 - *Appreciate inclusion of O&M staff and interviews of these staff*
- *B. Train Communities on EnergyStar Portfolio Manager*
 - *Provide NYSERDA example of ESPM target finder*
 - *Up to 7 on-site trainings, other trainings to be held virtually (assume to be 20 but this is not clarified)*
 - *Reserve time for second trainings if needed*
 - *Recognize staff turnover challenge, and will record trainings and invite multiple staff to participate to support this challenge*
- *C. Develop Energy Conservation Implementation Plans for Communities*
 - *Bring focus on project prioritization and development process*
 - *Acknowledges low capacity communities*
 - *Develop a template of the implementation plan and will share with state and local leaders to gain perspective and buy in.*
 - *Provide outline of energy conservation plan*
 - *Mention IRA and Efficiency Maine programs and incentives. Would benefit from mention of tax credits.*

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: NORESCO

DATE: 11/18/2024

- *Will meet with key decision makers in each community to convey final findings of plan.*

- *D. Develop an Energy Efficiency and Conservation Guidebook*
 - *Will present 4-8 common building types to use as reference buildings, as determined through the auditing process and implementation plans*
 - *Report will be no longer than 40 pages*
 - *NORESCO will partner with NEEP on this task*
 - *“Rural and bandwidth constrained communities likely face unique challenges, and this process of engaging with stakeholders will help uncover those specific hurdles and generate ideas for how to help communities move forward.”*
 - *Very thoughtful guidebook outline, anticipates community’s questions, needs, and reading styles*
 - *Would make final guidebook available in a webpage, presentation, or report format, depending on what is most valuable to communities*
 - *Includes value add of electrification, clean energy, and microgrids*
 - *Obtain feedback through two rounds of peer review from State and select communities*

- *E. Submit Quarterly and Final Performance Reports*
 - *Reasonable approach to communications and meeting project deliverables*
 - *Lays out role of each NORESCO team member in how they will support the project*

II. Implementation – Work Plan

- *Most of work takes place in the first 12 months*
- *Includes explanation section, which included notes such as:*
 - *Specialty type buildings such as wastewater treatment plants, water pump stations, and other special cases would be priced on a custom basis*
 - *Audits similar to ASHRAE Level II audit*

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: NORESCO

DATE: 11/18/2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	>	Cost Proposal Being Scored	x	Score Weight	=	Score
580,900	>	959,919	x	25 points	=	15

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156
RFP TITLE: Energy Efficiency Planning for Rural Communities
BIDDER: PowerOptions
DATE: 11/18/2024

SUMMARY PAGE

Department Name: Governor’s Office of Policy Innovation and the Future
Name of RFP Coordinator: Casey Zorn
Names of Evaluators: Casey Zorn, Brian Ambrette, Ross Anthony

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	29
Section III. Proposed Services	40	30
Section IV. Cost Proposal	25	25
<u>Total Points</u>	<u>100</u>	<u>84</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: PowerOptions

DATE: 11/18/2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

-provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: PowerOptions

DATE: 11/18/2024

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	29

Evaluation Team Comments:

I. Overview of the Organization

- Nonprofit that helps 500 organizations (nonprofits and public entities)
- Have served 280 public entities, including municipalities
- Discuss core services, including energy efficiency, EnergyStar Portfolio Manger, and Building Decarbonization road mapping
 - Do not discuss audits in terms of core services.
- PowerOptions Energy Sustainability and Analytics program since 2021
- Experience
 - Provided relevant experiences to support needs of RFP. Would benefit from more detail.
 - Massachusetts CEC
 - Buildings Electrification Transformation Accelerator – Roadmaps Programs
 - *Provide decarbonization plans (include energy efficiency, on-site solar, and electrification) to over 30 municipalities and nonprofits*
 - *How many were rural?*
 - 35 implementations plans, 180 buildings, 8.6 million sf
 - YMCA of Greater Boston
 - *Reports energy and water data on EnergyStar Portfolio Manager on behalf of YMCA for buildings subject to Boston ordinance*
 - *Energy efficiency and electrification plan as described in Experience 1, using remote audit software*
 - *Energy efficiency and decarbonization advisory consulting via biweekly calls*
 - Barrington NH Community Center (RBG experience)
 - *ASHRAE Level II Audit, June 2023*
 - *Benchmarking and audited building*
 - Payback period of 9.9 years
 - Has added experience with solar electric system

II. Subcontractors

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: PowerOptions

DATE: 11/18/2024

- Resilience Buildings Group, Inc (RBG) – Tasks A, B, and D
 - Concord, NH 2013
 - Building consulting services, including benchmarking, energy audits, retrofits, LEED, etc. throughout New England, including Maine
 - Has completed ASHRAE Level I and II audits for municipalities, schools, and public institutions
 - Has worked to secure federal funds, state funds, utility incentives and rebates, PUC rebates, and low-interest loans for projects
- GDS Associates, Inc (GDS) – Tasks A and B
 - 190 engineers and consultants, locations including Bedford, NH
 - Adds additional supports for energy audits
 - Have performed hundreds of commercial and industrial ASHRAE Level I, II, and III energy audits throughout New England
 - GDS is the implementor of Efficiency Maine’s commercial and industrial prescriptive program. Will have internal firewall between Bedford GDS team and Augusta GDS team.

III. Organizational Chart

- Provided a diagram that gave overview of PowerOptions as a whole, but would benefit from a project-specific chart that more clearly defined the chain of command and roles for this project

IV. Litigation

- None

V. Financial Viability

- Provided, with independent auditor’s reports for each year

VI. Licensure/Certification

- Provided

VII. Certificate of Insurances

- Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: PowerOptions

DATE: 11/18/2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	40	30

Evaluation Team Comments:

I. Services to be Provided

- *Provided clear layout of when subcontractors will be deployed for each task*
- *A. Provide Energy Audits on Publicly Owned Buildings in Maine Communities*
 - *ASHRAE Level II audits for all buildings*
 - *RBG and GDS will conduct preliminary analysis pre-audit*
 - *Thorough list of building attributes that will be included in pre-audit*
 - *RBG and GDS will conduct building site visits*
 - *Thorough list of ASHRAE level II considerations*
 - *Includes safety considerations*
 - *Blower door test, IR imaging*
 - *Installation of data loggers for 1-3 weeks*
 - *Might need more time to collect data for energy use technology, such as HVAC*
 - *Deliver audit report to PowerOptions to integrate into Task C*
 - *Mentions in Work Plan that this task will be led by RBG and supported by GDS. This section would have benefited from more detail around this dynamic.*
 - *Good use of inclusion of additional metrics for the analysis, including EUI*
- *B. Train Communities on EnergyStar Portfolio Manager*
 - *This task would benefit from more detail*
 - *Will split communities amongst the 3 consultants*
 - *Brief setup call with communities*
 - *Would benefit from more detail on how this setup call will be handled.*
 - *Create curriculum together at start of project*
 - *Will set up accounts for communities and benchmark on their behalf and then present portfolio and guidance.*
 - *Might result in less opportunity for hands on learning, but provides ease for communities.*

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: PowerOptions

DATE: 11/18/2024

- *1-2 hours of training per community with ongoing support and custom selection of resources.*
- *Identified pitfalls of benchmarking for low capacity communities*
 - *Plan to train multiple employees at once and provide materials*
- *Would benefit from more detail on how trainings will be administered.*

- *C. Develop Energy Conservation Implementation Plans for Communities*
 - *Led by PowerOptions*
 - *Synthesize combination of desktop analyses and audit results for prioritized list of ECPs*
 - *BETTER tool for efficiency*
 - *99% accuracy on potential energy savings compared to ASHRAE Level II audit (based on single buildings study)*
 - *Opportunity to test the tool's performance against audits for municipal buildings in Maine*
 - *Helioscope + PowerOptions solar financial model*
 - *Power Options model and audit for electrification*
 - *Is the cost integrated into this model and how is it estimated/calculated?*
 - *10-15 pages, including executive summary and timelines*
 - *Appreciate inclusion of this detail*
 - *1-2 months timeline from draft report to final report*
 - *1-on-1 presentations available for leadership teams*
 - *Mention rebates and tax credits*
 - *Mention solar options as a value add*

- *D. Develop an Energy Efficiency and Conservation Guidebook*
 - *Discuss non-participating communities, demonstrating understanding of task*
 - *Include instructions on how to use the tools that they use*
 - *Include lessons learned from previous tasks*
 - *During Task C, will compare audits to desktop results, and if promising, will include guidance for how municipalities can use the virtual software to do initial assessment.*
 - *Provide opportunity for GOPIF feedback*
 - *Will provide brief instruction to GOPIF on how to update guidebook over time.*

- *E. Submit Quarterly and Final Performance Reports*
 - *Would have benefited from more detail, such as meeting schedules and quality assurance.*

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: PowerOptions

DATE: 11/18/2024

II. Implementation – Work Plan

- *Would benefit from a breakdown by subtask for Gantt Chart*
- *Tasks span long period of time and extend close to end date of project without buffer. Specifically, audit period ends without substantial time to include in energy conservation implementation plans.*
 - *Plan for guidebook is write and edit it in the final 3 months.*
- *Would benefit from inclusion of PowerOptions in Task A. Would benefit from demonstration of PowerOptions' leadership, oversight, and coordination for this task.*

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER: PowerOptions

DATE: 11/18/2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
580,900	,	580,900	x	25 points	=	25

Evaluation Team Comments:

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: Cadmus

DATE: 11/13/2024

EVALUATOR NAME: Brian Ambrette

EVALUATOR DEPARTMENT: GOPIF

Individual Evaluator Comments:

- I. Preliminary Information
- II. Organization Qualifications and Experience
 1. Overview of Organization
 - PI Andrew Machado has experience with energy audits in larger commercial and industrial buildings in past two years
 - Proj Mgr Elissa Slocum is based in Maine and has worked with community stakeholders and other states for 11 years
 - Cadmus was GOPIF's consultant on the Clean Transportation Roadmap
 - will direct the consultant team and lead the individual tasks; will provide engineering analysis and lead the training effort, implementation planning, and guidebook development.
 2. Subcontractors
 - Bennett Engineering
 1. EMT Qualified Partner
 2. 40 years experience with building systems design, energy performance
 3. Various industrial, commercial, institutional, and community-owned buildings
 - Cx Associates
 1. Energy engineering firm, 18 staff w 13 engineers, 30 years experience
 2. Has performed close to 100 energy audits across northern New England
 - Energy Audits, Ltd.
 1. 14 years experience, EMT Qualified Partner
 2. Complete more than a dozen energy audits in Maine – agr, nonprofits, multifamily buildings.
 - Generally, partners have a range of firm sizes and experience in building types that are relevant to this scope of work
 3. Example projects
 - Project for Arlington County is relevant; level 1 audit; stakeholder engagement; Power BI decision making tool
 - Project for EMT is less relevant to scope of work

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: Cadmus

DATE: 11/13/2024

EVALUATOR NAME: Brian Ambrette

EVALUATOR DEPARTMENT: GOPIF

- Cx projects since 2016 for State of VT Municipal Energy Resilience Program are very relevant. Assessed Level I and II audits for 15 municipal buildings in Montpelier. Most recent state contract, audited 50 muni buildings for lighting, envelope, HVAC, battery storage potential, EV charging, on-site renewables, etc.

4. Organizational Chart

- Reasonable project management team and structure
- Primary POC is in-state and has over 10 yrs relevant experience
- Bennett and Cx staff will support in-person site visits for energy audits
 1. Bennett – electrical systems and electric service capacity
 2. Cx – building envelop issues
- Energy Audits Ltd will support site work as needed, as well as the implementation plan development

5. Litigation

- No litigation in past 5 years

6. Financial Viability

- Cadmus is in good standing with a clear credit history and secure financial standing as rated by Dun & Bradstreet
- no delinquent accounts or defaults on its record

7. Licensure/Certification

- provided

8. Certificate of Insurance

- provided

III. Proposed Services

1. Services to be Provided

- A. Provide Energy Audits on Publicly Owned Buildings in Maine Communities
 1. 20 audit reports in this proposal: 12 standard rigor, 5 enhanced rigor, and 3 remote (standard rigor) audits
 - a. 1-day Level I audits at 15/20 buildings – envelope, combustion analysis, renewables feasibility, building controls (Bennett)
 - b. Enhanced audits for 5/20 buildings – (Cx)
 2. Budget strategy that allows for 1-day travel and “remote” communities

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: Cadmus

DATE: 11/13/2024

EVALUATOR NAME: Brian Ambrette

EVALUATOR DEPARTMENT: GOPIF

3. Plans 4 waves of community work, each lasting several months
- B. Train Communities on EnergyStar Portfolio Manager
 1. 10 webinar training sessions for 10 participating communities, 90 minutes each (Cadmus w Cx)
 - 2.
 - 3.
 - 4.
- C. Develop Energy Conservation Implementation Plans for Communities
 1. Cadmus w Energy Audits Ltd and Bennett
 2. Economic analysis includes data from RSMeans Data
 3. GHG analyses using EPA tools, Scope 2 but not Scope 3
 4. Funding and incentive sources
 - 5.
- D. Develop an Energy Efficiency and Conservation Guidebook
 1. Guidebook and companion presentation (Cadmus)
 2. Optional – program performance dashboard
 - 3.
- E. Submit Quarterly and Final Performance Reports
 1. Familiar with PAGE reporting requirements
 - 2.
 - 3.

2. Implementation – Work Plan

- Reasonable work plan provided
- Timeline is detailed and includes task leads
-

IV. Cost Proposal

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: Glumac

DATE: 11/13/2024

EVALUATOR NAME: Brian Ambrette

EVALUATOR DEPARTMENT: GOPIF

Individual Evaluator Comments:

- I. Preliminary Information
 - 1. provided
- II. Organization Qualifications and Experience
 - 1. Overview of Organization
 - Portland based
 - Parent company is Tetra-Tech
 - Experience with multiple institutional projects in Maine
 - City of Los Angeles decarb work plan, 1000+ buildings
 - 2. Subcontractors
 - Tetra Tech (parent company)
 - MGAC – cost estimation, DC based
 -
 - 3. Organizational Chart
 - Project Manager + 3 community leads
 - Org chart includes firm Consentini but not detailed in Part 2
 - 4. Litigation
 - Glumac Energy & Sustainability Group has no litigation in past 5 years
 - Parent companies do have litigation
 - 5. Financial Viability
 - provided
 - 6. Licensure/Certification
 - provided
 - 7. Certificate of Insurance
 - provided
- III. Proposed Services
 - 1. Services to be Provided
 - Biweekly project meetings
 - A. Provide Energy Audits on Publicly Owned Buildings in Maine Communities
 - 1. Level I and II audit services
 - 2.
 - 3.
 - 4.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Brian Ambrette

EVALUATOR DEPARTMENT: GOPIF

- B. Train Communities on EnergyStar Portfolio Manager
 1. 4 modules for training program, format?
 2. Unclear if “live” format is in-person or webinar
 3. TA to each community *could* include hands-on practice, ongoing help desk, QAQC for data input
 - 4.
- C. Develop Energy Conservation Implementation Plans for Communities
 - 1.
 - 2.
 - 3.
 - 4.
- D. Develop an Energy Efficiency and Conservation Guidebook
 1. Guidebook outline provided – includes community resilience opportunities
 - 2.
 - 3.
- E. Submit Quarterly and Final Performance Reports
 - 1.
 - 2.
 - 3.

2. Implementation – Work Plan

- Time line does not provide much cushion for delays, especially for Group 2
-

IV. Cost Proposal

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: John Turner Consulting

DATE: 11/13/2024

EVALUATOR NAME: Brian Ambrette

EVALUATOR DEPARTMENT: GOPIF

Individual Evaluator Comments:

- I. Preliminary Information
- II. Organization Qualifications and Experience
 1. Overview of Organization
 - Sustainability & Energy Services division is new in 2023
 - Services provided include energy audits, LED retrofits, lighting controls, HVAC retrofits, refrigeration retrofits, and building envelope improvements
 - Service provider in VT's Municipal Energy Resilience Program – 41 buildings in 23 communities – fire stations, town offices, libraries, WWT facilities, and various other community buildings
 2. Subcontractors
 - none
 3. Organizational Chart
 - Provided, with 2 project managers but no description of additional staff/SMEs that will be part of the team
 4. Litigation
 - None in past 5 years
 5. Financial Viability
 - provided
 6. Licensure/Certification
 - provided
 7. Certificate of Insurance
 - provided
- III. Proposed Services
 1. Services to be Provided
 - A. Provide Energy Audits on Publicly Owned Buildings in Maine Communities
 1. Minimally descriptive, largely restates the RFP
 2. No description of audit level/intensity or rigor
 3. No discussion of specifically how their expertise and technologies will be deployed to this project
 4. No discussion of how project team will cover the geographic distribution of communities around the state

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

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BIDDER NAME: John Turner Consulting

DATE: 11/13/2024

EVALUATOR NAME: Brian Ambrette

EVALUATOR DEPARTMENT: GOPIF

- B. Train Communities on EnergyStar Portfolio Manager
 1. Would benefit from more detail on training formats, timing, examples of workshops, etc.
 2. Does not discuss experience with ESPM
 - 3.
 - 4.
- C. Develop Energy Conservation Implementation Plans for Communities
 1. Offers little expansion on the components requested in the RFP
 2. Would benefit from inclusion of analytical tools to be used (e.g. for economic modeling, GHG estimation)
 - 3.
- D. Develop an Energy Efficiency and Conservation Guidebook
 1. Minimally responsive
 - 2.
 - 3.
- E. Submit Quarterly and Final Performance Reports
 1. Bidder omitted this task
 - 2.
 - 3.

2. Implementation – Work Plan

- 4 cohorts of communities – would benefit from a description of how this would work
- Gantt chart indicates that two engineering teams would be deployed in an alternating pattern but there is no description of how this would work or what the benefit of an alternating pattern is
- End date is 6 months before RFP’s projected contract end date, so plenty of buffer against delays

IV. Cost Proposal

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: NORESKO

DATE: 11/14/2024

EVALUATOR NAME: Brian Ambrette

EVALUATOR DEPARTMENT: GOPIF

Individual Evaluator Comments:

- I. Preliminary Information
 - 1. provided
- II. Organization Qualifications and Experience
 - 1. Overview of Organization
 - wholly-owned, indirect subsidiary of Carrier
 - Qualification statement is generalized and in places does not reflect the RFP – e.g. the applicant’s framing of “decarbonization” is not consistent with the RFP’s framing on “energy efficiency” and is unlikely to resonate with rural communities.
 - Similarly, the benchmarking section seems preoccupied with local ordinance compliance, which is not a focus of the RFP.
 - Handbook section misses the mark too, focusing on technical audiences rather than small town administrators
 - 2. Experience
 - Project 1 appears relevant to the scope of work but offers little detail of the actual services provided.
 - Project 2 in Texas and Project 3 in New York City appear relevant to the scope of work but would benefit from greater detail on applicant’s role and services provided.
 -
 - 3. Subcontractors
 - Northeast Energy Efficiency Partnerships, INC (NEEP)
 - 1. PM Balfe worked for NEEP until 2023
 - 2. Experience with cold-climate heat pumps and VRF technologies
 -
 - 4. Organizational Chart
 - Unclear where project team is located and what individual roles are expected
 -
 - 5. Litigation
 - “NORESKO is, from time to time, involved in litigation in the ordinary course of its business. NORESKO has no past or resent [sic - typo] litigation which, if decided adversely, would impair

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: NORESCO

DATE: 11/14/2024

EVALUATOR NAME: Brian Ambrette

EVALUATOR DEPARTMENT: GOPIF

NORESCO's ability to perform the services described in this RFP."

6. Financial Viability
 - provided
 7. Licensure/Certification
 - provided
 8. Certificate of Insurance
 - provided
- III. Proposed Services
1. Services to be Provided
 - A. Provide Energy Audits on Publicly Owned Buildings in Maine Communities
 1. Walk-thru level assessment with instantaneous measurements
 2. Energy savings accuracy is +/- 20%
 3. RS Means cost data
 - 4.
 - B. Train Communities on EnergyStar Portfolio Manager
 1. NYSERDA example – assisted rural communities with ESPM Target Finder
 2. Up to 7 onsite trainings, remainder to be held virtually. Will reserve time for second trainings, if needed.
 3. Recognizes staff turnover in communities and will record training sessions and document the process for subsequent staff use
 - 4.
 - C. Develop Energy Conservation Implementation Plans for Communities
 1. Focus on project prioritization and development process
 - a. Acknowledges low capacity communities in this step
 2. Outline of Plan provided
 3. Mentions IRA and EMT programs
 4. Will meet with individual communities to report results
 - D. Develop an Energy Efficiency and Conservation Guidebook
 1. Will present 4-8 common building types as references, types will be determined thru the development of implementation plans
 2. No longer than 40 pages

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: NORESKO

DATE: 11/14/2024

EVALUATOR NAME: Brian Ambrette

EVALUATOR DEPARTMENT: GOPIF

3. Partner with NEEP on this task
 4. "Rural and bandwidth constrained communities likely face unique challenges, and this process of engaging with stakeholders will help uncover those specific hurdles and generate ideas for how to help communities move forward."
 5. Very thoughtful guidebook outline, anticipates community questions and needs and reading styles
 6. webpage, presentation, or report format depending upon what is most valuable to communities.
- E. Submit Quarterly and Final Performance Reports
 1. Reasonable approach to communications and meeting deliverables
 - 2.

2. Implementation – Work Plan

- Timeline – most work takes place in first 12 months, only finalization of community plans and training extends in to Year 2
- "Specialty type buildings/facilities such as wastewater treatment plants, utility building (electric generation or water pump stations, etc.), correction facilities, and other nontypical municipal buildings/ facilities can be priced on a custom basis"
- Work scope is similar to an ASHRAE Level 2 audit
-

IV. Cost Proposal

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: PowerOptions

DATE: 11/15/2024

EVALUATOR NAME: Brian Ambrette

EVALUATOR DEPARTMENT: GOPIF

Individual Evaluator Comments:

- I. Preliminary Information
 1. provided
- II. Organization Qualifications and Experience
 1. Overview of Organization
 - MA based
 - Experience with municipal governments' energy needs with services in energy services, data, emissions analytics, sustainability consulting
 - \$2M contract from State of MA – completed 40+ implementation plans for public and nonprofit buildings.
 - MA Green Communities prgm contract to provide municipal energy efficiency and decarbonization roadmaps
 2. Subcontractors
 - Resilient Buildings Group Inc (RBG)
 1. NH based
 2. Experience with benchmarking, energy audits, etc. including Level I and II audits for munis, schools, public-serving institutions
 3. Familiar with state and federal funds/incentives
 - GDS Associates (GDS)
 1. National, project team NH based
 2. Engineering firm, local team specializes in energy efficiency and building energy services. 100's of Level I, II, III audits
 3. Experiences supporting communities in MA Green Energy program
 4. Augusta, ME office has participated in EMT C&I program. Not part of project team to avoid potential conflicts of interest but can provide info on EM incentives.
 3. Example Projects
 - Project 1 demonstrates PowerOptions experience in state-led TA support for municipal energy efficiency. 35 plans so far.
 - Project 2 demonstrates PowerOptions experience with Energy Star Portfolio Manager and building performance compliance
 - Project 3 demonstrates RBG's experience with benchmarking, auditing, and energy efficiency recommendations for community buildings

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

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BIDDER NAME: PowerOptions

DATE: 11/15/2024

EVALUATOR NAME: Brian Ambrette

EVALUATOR DEPARTMENT: GOPIF

4. Organizational Chart
 - PowerOptions org chart provided.
 - A project team org chart would be helpful
 - Erin Camp is POC
5. Litigation
 - none
6. Financial Viability
 - provided
7. Licensure/Certification
 - provided
8. Certificate of Insurance
 - provided

III. Proposed Services

1. Services to be Provided

- A. Provide Energy Audits on Publicly Owned Buildings in Maine Communities
 1. Level II audit for all buildings (RBG and GDS)
 - 2.
- B. Train Communities on EnergyStar Portfolio Manager
 1. Project team will input data for communities
 2. Then present portfolio to each community and provide guidance
 - a. pro – less burdensome for community
 - b. con – less training, less opportunity for community to learn how to use ESPM
 3. Thoughtful considerations about potential challenges and solutions
 - 4.
- C. Develop Energy Conservation Implementation Plans for Communities
 1. analysis is performed at the individual building level, and the report will present results for the entire portfolio
 2. combines audits with PowerOptions' desktop approach
 3. will compare virtual assessments with in-person audits to determine whether virtual software is feasible to recommend in the Task D guidebook

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EVALUATOR DEPARTMENT: GOPIF

4. And will test the DOE BETTER tool for GHG reduction potential against Level II audit for possible use in guidebook
 5. Helioscope software for onsite solar potential and in house solar financing model
 6. Deliverable is 10-15 report and 1-hour presentation to community
- D. Develop an Energy Efficiency and Conservation Guidebook
 1. Led by PowerOptions
 2. “leverage primary resources” may mean lots of links to external content rather than a complete guide – will want be sure we understand this if bidder is selected
 - 3.
 - E. Submit Quarterly and Final Performance Reports
 - 1.
 - 2.
 - 3.
2. Implementation – Work Plan
 - plans to dedicate a month to each community
 - Guidebook will be written and edited in final 3 months – may want to accelerate this

IV. Cost Proposal

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: Cadmus

DATE: 11/13/2024

EVALUATOR NAME: Ross Anthony

EVALUATOR DEPARTMENT: Governor's Energy Office

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Preliminary Information

- 1. Present*

II. Organization Qualifications and Experience

- 1. Overview of Organization*

- Previous experience working with Maine (e.g., Transportation Roadmap, Efficiency Maine)*
- Core team with members (1) in Maine and (2) experience with larger C&I*
- Example projects include Arlington County (i.e., audits), (2) Efficiency Maine, and (3) Vermont BGS (i.e., similar to SOW, multiple locations throughout state, variety of measures)*
- Team of subcontractors*

- 2. Subcontractors*

- Bennett Engineering (EMT QP; C&I experience)*
- Energy Audits LTD (EMT QP; audits)*
- Cx Associates (engineering and audits)*
- Various sizes of subcontractors and experiences related to SOW*
- Example projects included*

- 3. Organizational Chart*

- In-state POC with 10+ years of experience*
- Subcontractors will help with audits and implementation plans*
- Conflicting POC in supporting documents*

- 4. Litigation*

- Present*

- 5. Financial Viability*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: Cadmus

DATE: 11/13/2024

EVALUATOR NAME: Ross Anthony

EVALUATOR DEPARTMENT: Governor's Energy Office

- *Present*
- 6. *Licensure/Certification*
 - *Present*
- 7. *Certificate of Insurance*
 - *Present*

III. Proposed Services

1. *Services to be Provided*
 - *A. Provide Energy Audits on Publicly Owned Buildings in Maine Communities*
 1. *Good inventory of tools for audit purposes*
 2. *ASHRAE Level 1 (Bennett) and "enhanced audit" (Cx) (25% of sites) that will include blower door, thermal imaging, and related*
 3. *Cost of "remote" sites (15% of total sites) included broken out due to distance from their in-state staff*
 4. *Four phases for workplan*
 5. *Not enough site visits per SOW*
 - *B. Train Communities on EnergyStar Portfolio Manager*
 1. *Long relationship with EPA and ESPM*
 2. *Good forethought of naming conventions, file structure, and related for aggregation*
 3. *Webinar trainings to communities with recordings and supplemental materials*
 - *C. Develop Energy Conservation Implementation Plans for Communities*
 1. *Mentioned financial assistance via rebates, incentives, tax credits, etc.*
 2. *RSMean; GHG analysis with EPA tools*
 3. *30M square feet managed including strategies and M&V*
 4. *Working with subcontractors for pricing support*
 - *D. Develop an Energy Efficiency and Conservation Guidebook*
 1. *Full documentation including challenges for communities*
 2. *Summary and maintenance guide for municipalities*
 3. *Optional hosting of a performance dashboard*
 - *E. Submit Quarterly and Final Performance Reports*
 1. *Work with PAGE for reporting*
2. *Implementation – Work Plan*
 - *Reasonable*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: Cadmus

DATE: 11/13/2024

EVALUATOR NAME: Ross Anthony

EVALUATOR DEPARTMENT: Governor's Energy Office

- *Gantt chart with task lead information*

IV. Cost Proposal

1. Present

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: Glumac

DATE: 11/13/2024

EVALUATOR NAME: Ross Anthony

EVALUATOR DEPARTMENT: Governor's Energy Office

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Individual Evaluator Comments:

I. Preliminary Information

- 1. Present*

II. Organization Qualifications and Experience

- 1. Overview of Organization*

- National and local presence*
- Previous experience and an office in Maine*
- Example projects include (1) LA building decarbonization (large audits, 1K buildings), (2) George Mason University (large audits), and (3) San Luis Obispo (30 buildings, audits, closer to SOW)*
- Team of subcontractors*

- 2. Subcontractors*

- Tetra Tech (SME, engineering; more info on Consentini?)*
- MGAC (cost estimator)*

- 3. Organizational Chart*

- Listed two managers – what are the differences between program and project manager?*

- 4. Litigation*

- Present; Tetra Tech has ongoing litigation but noted no impact on SOW*

- 5. Financial Viability*

- Present*

- 6. Licensure/Certification*

- Present*

- 7. Certificate of Insurance*

- Present*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: Glumac

DATE: 11/13/2024

EVALUATOR NAME: Ross Anthony

EVALUATOR DEPARTMENT: Governor's Energy Office

III. Proposed Services

1. Services to be Provided

- *A. Provide Energy Audits on Publicly Owned Buildings in Maine Communities*
 1. *History of audit levels (up to Level 3) and clients*
 2. *Expect Level 1 and Level 2 for this SOW*
 3. *Consideration of existing structure status and condition*
 4. *2-6 buildings per community*
 - *B. Train Communities on EnergyStar Portfolio Manager*
 1. *Experience with ESPM*
 2. *Training sessions including setup, data input, analysis, etc.*
 3. *QA/QC checks present*
 4. *Trainings to be recorded for public*
 5. *All buildings? Or just 2-6 per community?*
 - *C. Develop Energy Conservation Implementation Plans for Communities*
 1. *Aligns with MWW goals*
 2. *Developing a prioritized list of projects*
 3. *Community engagement*
 4. *Seems like a lot of software resources for communities – is this appropriate for laypeople?*
 5. *ROM cost estimates*
 - *D. Develop an Energy Efficiency and Conservation Guidebook*
 1. *User friendly designs throughout*
 2. *Work with communities for input*
 3. *Interactive dashboard*
 4. *Period of review for state*
 - *E. Submit Quarterly and Final Performance Reports*
 1. *Tight timeline for internal review*
 2. *Any experience with federal reporting?*
 - a. *Looks like using Tetra Tech for reporting*
- 2. Implementation – Work Plan*
- *Full timeline*
 - *Little detail for each task*

IV. Cost Proposal

1. Present

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: John Turner

DATE: 11/13/2024

EVALUATOR NAME: Ross Anthony

EVALUATOR DEPARTMENT: Governor's Energy Office

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Individual Evaluator Comments:

I. Preliminary Information

1. Present

II. Organization Qualifications and Experience

1. Overview of Organization

- Local presence (i.e., Bangor and Lisbon)
- Consistent with SOW
- Example projects include work with VT BGS for (1) Hardwick Public Safety and Senior Center, (2) Hardwick Municipal Office Building, and (3) Waterford Town Offices and Library

2. Subcontractors

- None

3. Organizational Chart

- Provided
- Could use more detail – what role are folks playing for this project?

4. Litigation

- Present

5. Financial Viability

- Present

6. Licensure/Certification

- Present

7. Certificate of Insurance

- Present

III. Proposed Services

1. Services to be Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: John Turner

DATE: 11/13/2024

EVALUATOR NAME: Ross Anthony

EVALUATOR DEPARTMENT: Governor's Energy Office

- *A. Provide Energy Audits on Publicly Owned Buildings in Maine Communities*
 1. *Needs more detail on audits (e.g., level, coverage, etc.)*
 2. *Blower door, infrared thermography, combustion analyzers*
 3. *Notes several standard items (e.g., space heating, water heating, Wxn, lighting) and data collection*
- *B. Train Communities on EnergyStar Portfolio Manager*
 1. *Needs more detail on ESPM*
 2. *More information on how trainings will be held and used*
- *C. Develop Energy Conservation Implementation Plans for Communities*
 1. *Could use additional detail on financing mechanisms (e.g., Efficiency Maine, tax credits, etc.)*
 2. *Needs more detail on tools/software used (e.g., RSMeans)*
- *D. Develop an Energy Efficiency and Conservation Guidebook*
 1. *More detail on non-participating communities*
 2. *Case studies, maintenance plan, etc. included*
- *E. Submit Quarterly and Final Performance Reports*
 1. *Not present*
- 2. *Implementation – Work Plan*
 - *Present, but no detail*
 - *Does not align with tasks in RFP*
 - *4 cohorts – why?*
 - *Time buffer between timeline and project close*

IV. Cost Proposal

1. *Present*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: NORESCO

DATE: 11/14/2024

EVALUATOR NAME: Ross Anthony

EVALUATOR DEPARTMENT: Governor's Energy Office

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Individual Evaluator Comments:

I. Preliminary Information

- 1. Present*

II. Organization Qualifications and Experience

- 1. Overview of Organization*

- Subsidiary of Carrier*
- Example projects include (1) ASHRAE Decarbonization Guide and (2) Texas State Energy Conservation Office*
- Team of subcontractors*

- 2. Subcontractors*

- NEEP (technology SME, energy landscape in New England, community engagement)*

- 3. Organizational Chart*

- Provided*
- Could use more information on project team and NEEP's role in chart*

- 4. Litigation*

- Present – notes that NORESCO is involved from time to time but no material impact on this RFP*

- 5. Financial Viability*

- Present*

- 6. Licensure/Certification*

- Present*

- 7. Certificate of Insurance*

- Present*

III. Proposed Services

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: NORESCO

DATE: 11/14/2024

EVALUATOR NAME: Ross Anthony

EVALUATOR DEPARTMENT: Governor's Energy Office

1. Services to be Provided

- *A. Provide Energy Audits on Publicly Owned Buildings in Maine Communities*
 1. *Level 2 ASHRAE audits*
 2. *Energy savings accuracy +/- 20%*
 3. *RSMMeans*
 4. *Good inclusions of O&M staff interviews*
 - *B. Train Communities on EnergyStar Portfolio Manager*
 1. *Experience with ESPM*
 2. *Trainings and potential second round of trainings detail included*
 3. *Appreciate recognition of staff turnover and making resources available for future staff*
 - *C. Develop Energy Conservation Implementation Plans for Communities*
 1. *Appreciate acknowledgement of low capacity communities and resources needed to help them*
 2. *Financing mechanisms notes (e.g., Efficiency Maine) but could use mention of tax credits*
 3. *Meet with community members for final plan*
 - *D. Develop an Energy Efficiency and Conservation Guidebook*
 1. *Use select building types as exemplars for other communities*
 2. *Thoughtful outline of guidebook (e.g., 40 page maximum, learning styles, etc.)*
 3. *Two rounds of peer feedback from GOPIF and communities*
 - *E. Submit Quarterly and Final Performance Reports*
 1. *Thoughtful approach*
- 2. Implementation – Work Plan*
- *Present and reasonable*

IV. Cost Proposal

1. Present

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: PowerOptions

DATE: 11/14/2024

EVALUATOR NAME: Ross Anthony

EVALUATOR DEPARTMENT: Governor's Energy Office

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Individual Evaluator Comments:

I. Preliminary Information

- 1. Present*

II. Organization Qualifications and Experience

1. Overview of Organization

- Nonprofit*
- 280 public and municipal clients*
- Experience with EE, ESPM, and building decarbonization*
- Example projects include (1) Mass CEC, (2) YMCA in Boston, and (3) Barrington NH Community Center*
- Team of subcontractors*

2. Subcontractors

- RBG (Tasks A, B, and D)*
- GDS (Tasks A and B)*
- Both helping with audits and trainings. RBG additionally helping with guidebook.*

3. Organizational Chart

- Looks like PowerOptions organization chart and not project chart*

4. Litigation

- Present*

5. Financial Viability

- Present*

6. Licensure/Certification

- Present*

7. Certificate of Insurance

- Present*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: PowerOptions

DATE: 11/14/2024

EVALUATOR NAME: Ross Anthony

EVALUATOR DEPARTMENT: Governor's Energy Office

III. Proposed Services

1. Services to be Provided

- *A. Provide Energy Audits on Publicly Owned Buildings in Maine Communities*
 1. *ASHRAE Level 2*
 2. *Subcontractors to do pre-audit reviews and audits*
 - a. *How will the work be shared between GDS and RBG?*
 3. *Will be used for Task C by PowerOptions*
 4. *Appreciate the inclusion of other summary stats from audits (e.g., EUI, etc.)*
 - *B. Train Communities on EnergyStar Portfolio Manager*
 1. *Split amongst PowerOptions and subcontractors*
 2. *Set up ESPM accounts on behalf of communities*
 - a. *Will this hurt communities in learning how to use ESPM?*
 3. *1-2 hours with communities and ongoing support*
 4. *How will trainings be held? Unclear*
 - *C. Develop Energy Conservation Implementation Plans for Communities*
 1. *Led by PowerOptions*
 2. *High stated accuracy for energy savings potential*
 3. *Short report (i.e., 15 page maximum) with presentations to leadership*
 4. *Good mention of finance levers (e.g., Efficiency Maine, tax credits, etc.)*
 - *D. Develop an Energy Efficiency and Conservation Guidebook*
 1. *Good detail on helping non-participating communities*
 2. *Integrate lessons learned, instructions, guidance for initial assessments*
 - a. *Concern about software used by communities – is this user friendly?*
 - *E. Submit Quarterly and Final Performance Reports*
 1. *Present but could use more detail*
- 2. Implementation – Work Plan*
- *Could use a Gantt Chart*
 - *More detail shown about above concerns (i.e., who is leading audits)*
 - *Will PowerOptions be involved at all in Task A?*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: PowerOptions

DATE: 11/14/2024

EVALUATOR NAME: Ross Anthony

EVALUATOR DEPARTMENT: Governor's Energy Office

IV. Cost Proposal
1. Present

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: Cadmus

DATE: 11/13/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Preliminary Information

-

II. Organization Qualifications and Experience

- *Overview of Organization*

- *Cadmus (Virginia, locations in Freeport and Portland)*
 - *Will direct consultant team and lead individual tasks*
 - *Provide engineering analysis, lead training effort, implementation planning, and guidebook development*
 - *Energy Services Division – energy efficiency and decarbonization, market research and analysis, utility program planning and design, etc*
 - *Clean Transportation Roadmap for GOPIF – has been used by the GOPIF team before*
 - *Project leaders would be based in Massachusetts and Maine and have experience working in New England/Maine*
- *Projects/Experience*
 - *Building Energy Efficiency and Decarbonization Prioritization Tool*
 - a. *Help Arlington County prioritize building upgrades and investments in 9 facilities*
 - b. *ASHRAE Level I audits*
 - c. *Power BI decision making tool*
 - *Refrigerant Management Study*
 - a. *For Efficiency Maine Trust*
 - b. *Refrigerant leakage*
 - *Municipal Building Energy Assessment*
 - a. *Cx Associates*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: Cadmus

DATE: 11/13/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

- *Would benefit from a more clear explanation of who will be working with the communities and how this will be organized*

- *Litigation*
 - *None*
- *Financial Viability*
 - *Positive gross revenue, over \$200 million for 2023*
 - *Increasingly profitable*
- *Licensure/Certification*
 - *Building Analyst professionals*
 - *Efficiency Maine Qualified partners*
 - *PEs, AIA*
- *Certificate of Insurance*
 - *Included*

III. Proposed Services

- *Services to be Provided*
 - *Numbers seem to be random, benchmarking training is for 10 communities, audits are for 20 facilities, 10 implementation plans*
 - *A. Provide Energy Audits on Publicly Owned Buildings in Maine Communities*
 - *2 levels of audit (Led by Bennett and Cx, Energy Audits Ltd and Cadmus will contact audits as needed)*
 - a. *One day audit (ASHRAE I)*
 - i. *Benett Engineering*
 - b. *Enhanced audit (another field day at 25% of the sites)*
 - i. *Cx Associates*
 - ii. *Exterior envelope (blower door or thermal imaging)*
 - iii. *Combustion analysis*
 - iv. *Renewables feasibility*
 - v. *Building controls trend analysis??*
 - *Shows understanding of maximizing value for each community and facility by prioritizing the measures that will be most beneficial. Ex, blower door tests might not be the most beneficial for every facility.*
 - *Shows available equipment owned by Cadmus that will be used for diagnostic tests*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: Cadmus

DATE: 11/13/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

- *Breaks down cost for “remote” sits that are outside 3 hr commute, which is 15% of participating communities*
- *4 waves to accommodate onboarding, etc*
- *12 standard rigor audits, 5 enhanced, 3 remote standard in cost proposal*
- *B. Train Communities on EnergyStar Portfolio Manager*
 - *Cadmus has experience with providing customer support for Portfolio Manager. Jenna Lipscomb, engagement lead, has experience specifically.*
 - *Will teach best practices*
 - a. *A lot of these best practices seem to require a high level of computer literacy. Do not seem tailored for low capacity rural communities.*
 - b. *1 on 1 trainings with each community*
 - i. *This might help with the low capacity needs*
 - *Trainings provided via webinar*
 - *Provide GOPIF with time to give feedback on presentations*
 - *Will provide slides and recordings after sessions*
 - *10 trainings sessions for 10 participating communities at 90 minutes per session*
 - a. *This will likely be 14*
 - b. *What is expected for 10 sessions? What will be taught in each session? 10 sessions might be too much.*
 -
- *C. Develop Energy Conservation Implementation Plans for Communities*
 - *Cadmus will lead this, with Energy Audits Ltd and Bennett providing pricing support*
 - *Will work with community stakeholders to ensure prioritized list of interventions meet the community goals within limits of funding*
 - *Cadmus outreach throughout project, starting during data request process*
 - *Economic Analysis, Greenhouse Gas Emissions based on electrical and fuel savings using Scope 1 and 2 emissions, Funding Sources (shows understanding of Efficiency Maine and GEO resources)*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: Cadmus

DATE: 11/13/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

- *Will include period for communities to provide feedback into final plan*
- *Prioritize working with local contractors to get accurate timely local pricing*
- *D. Develop an Energy Efficiency and Conservation Guidebook*
 - *Maine Clean Transportation Roadmap, experience developing robust guidebooks for GOPIF*
 - *In addition to guidebook, will prepare summary presentation to deliver to stakeholders and maintenance guide*
 - *Option to create an interactive dashboard*
 - *This section did not include a lot of detail and did not display a clear understanding of the task or expected deliverables*
- *E. Submit Quarterly and Final Performance Reports*
 - *Has experience with EECBG for Boston and Providence*
 - *Monthly meetings with stakeholders and additional collaboration as needed*
 - *Plans to submit reports via PAGE, should check if this is the expectation or if we will have them submit to us*
 -
- *Implementation – Work Plan*
 - *Start with data request (includes needed information)*
 - *2 hours of support per community to support data request*
 - *Train Communities first on Portfolio Manager early in data request process*
 - *Standard Energy audits next to identify the enhanced audits needed*
 - *Data analysis*
 - *Unclear if additional analysis on solar, energy storage, EV charging would cost extra for the interested communities*
 - *Provides Gantt chart which shows all tasks across 4 waves of 10 communities, 20 buildings total*

IV. Cost Proposal

- *Cost would over double with the addition of 4 communities and more than 2 buildings per community*
- *But does additional buildings necessarily add equal cost if travel could be done in batches?*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: Cadmus

DATE: 11/13/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

- *Confirm increased cost with bidder to ensure uniform comparison to other cost proposals*
- *Enhanced audit after standard audit for remote locations might not be efficient/cost efficient*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: Glumac

DATE: 11/13/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

- I. *Preliminary Information*
 - *Brad Miller, lead point of contact, remote worker based out of Portland, ME*
- II. *Organization Qualifications and Experience*
 - *Overview of Organization*
 - *Glumac*
 - *Lead based out of Portland*
 - *Over 50 million sf of energy audits*
 - *Parent company is TetraTech*
 - *1,000+ government projects*
 - *Included ongoing work, no completed projects included in experience*
 - *Experience:*
 - *Audits, none listed for Maine*
 - *Maine experience: building design, assessment, upgrade projects for universities and some public buildings*
 - *City of Los Angeles Existing Decarbonization Work Plan*
 - *Large project, over 1,000 buildings*
 - *Shows they can stay organized for such a large project*
 - *Custom tracking tool for the city*
 - *George Mason University Energy Efficiency and Resilience Action Plan*
 - *9 million sf*
 - *Stakeholder engagement*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: Glumac

DATE: 11/13/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

- *Developing bespoke scenario planning tool*
 - *City of San Luis Obispo Carbon Neutral Plan*
 - *30 buildings (more on the scale of this project)*
 - *Energy audits and building electrification studies at all facilities*
 - *Solar PV study*
 - *Microgrid feasibility study*
 - *Fleet electrification plan*
 - *Subcontractors*
 - *Tetra Tech (parent company) and Consentini (sister company) will provide support*
 - *Some subject matter expertise and energy engineering*
 - *MGAC*
 - *Primary cost estimator services*
- *Organizational Chart*
 - *Provides chart to explain how lead and subcontractors will work together*
 - *Brad Miller will serve as Project Manager and primary energy auditor*
 - *Provides subject matter experts in solar PV, energy resilience, incentives, dashboard development, community resilience, and DOE grants*
 - *Provides energy planning expertise, energy audits, and engineers (mechanical, electrical, and plumbing)*
- *Litigation*
 - *Provides a paragraph stating that the parent company has some ongoing litigation but does not provide detail. Says this will not have material effect on financial position.*
- *Financial Viability*
 - *Positive value, \$2.6 billion*
- *Licensure/Certification*
 - *Proposed staff include CEM, EEP, BEMP, PE, LEED, professional estimator, etc*
- *Certificate of Insurance*
 - *Included*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: Glumac

DATE: 11/13/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

III. Proposed Services

- *Services to be Provided*
 - *Assumes 20 communities in timeline*
 - *Biweekly meetings with communities*
 - *Monthly meetings with GOPIF*
 - *Provides QA plan*
 - *Who are the community leads? Are these Glumac staff or community staff?*
 - *A. Provide Energy Audits on Publicly Owned Buildings in Maine Communities*
 - *Shows understanding of number of potential buildings (2-6 per community)*
 - *Does not discuss possibility of remote locations and how these communities will be served*
 - *Community kickoff and data collection*
 - *Seems wholistic and well designed*
 - *Project kick off with each community*
 - *Collect, process, and review available information*
 - *Meet with building management and facilities staff to review existing deferred maintenance needs, operational processes, and management policies*
 - *Building Energy Audits*
 - *Mix of review of data and onsite building walk through*
 - *Onsite building walkthrough*
 - *Energy efficiency*
 - *Energy conservation*
 - *Electrification*
 - *Clean energy*
 - *Like the way this is broken down, robust analysis*
 - *Building envelope review with thermal imaging*
 - *GHG savings potential*
 - *Rough order of magnitude project costs*
 - *Deliverables:*
 - *Executive summary*
 - *Methodology*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: Glumac

DATE: 11/13/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

- *Existing conditions summary*
 - *Summary of energy measures*
 - *Qualitative assessment of EEMs (energy efficiency measures)*
- *B. Train Communities on EnergyStar Portfolio Manager*
 - *Based on cost proposal, might be under assumption that they are helping with EnergyStar Portfolio trainings for all municipal buildings for each community instead of just the 2-6 identified buildings. Same for Task C.*
 - *Has experience with Portfolio Manager for energy audits at public facilities*
 - *Demonstrates understanding of the tool and usefulness of tool*
 - *Develop training Program using existing guides and trainings, developing custom materials for local Maine communities*
 - *Account setup, building setup, data input, and data analysis*
 - *Deliver trainings to communities, providing session materials to communities and Q&A opportunities*
 - *Does not note how many sessions, if they will be one on one, etc.*
 - *Will provide TA/help desk support to each community assisting with inputting of data for the associated buildings*
 - *Does not claim they will input the data on behalf of the communities*
 - *Recorded presentations*
 -
- *C. Develop Energy Conservation Implementation Plans for Communities*
 - *Extensive experience with decarb plans for communities (many large communities and universities)*
 - *Uses a lot of tech, not sure this is the best option for low capacity rural communities. This will require a lot of additional training for these communities and may be too bespoke.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: Glumac

DATE: 11/13/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

- *Appreciate meeting with key stakeholders, facilities manager and users, etc during this process*
 - *C.1 Community Engagement and Data Collection*
 - i. How is C.1 Community Engagement and Data Collection separate from the energy audit? This information won't have to be collected twice.*
 - ii. Review MWW and community goals*
 - iii. Collect building data and develop portfolio building database*
 - iv. Review existing capital expenditure plans, facilities master plans, deferred maintenance needs*
 - *C2 Energy Project Identification and Analysis*
 - i. Establish database of potential energy projects for communities to implement*
 - ii. Using data and in collaboration with community stakeholders, identify relevant energy projects*
 - iii. Estimated energy, utility cost, and GHG emissions savings*
 - iv. Provide rough order of magnitude budgets for each project*
 - v. Analyze payback period to determine financial viability*
 - *C3 Developing Project Budgets and ROM Cost Estimating*
 - i. Custom energy and carbon planning tool for each community*
 - ii. Meeting with stakeholders*
 - iii. Assess various implementation timelines to meet MWW goals and other community priorities*
 - iv. Provide sensitivity analysis*
 - v. Recommended package of energy projects for each building and community*
 - *C4 Implementation Planning and Funding Options*
 - i. Establish energy project prioritization framework for each community*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: Glumac

DATE: 11/13/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

- *Works on guidebook in the middle of the whole process*
- *Most processes begin up front in the beginning*
- *Well staged. Shows clear understanding of the deliverables and how to stage development of the deliverables with multiple ongoing processes.*

IV. Cost Proposal

- *Will have to do follow up with bidder to ensure cost is uniformly compared to other bidder costs based on assumptions*
- *Task A – currently assumes 80 buildings, likely to be more in the range of 40-50 buildings.*
- *Task B assumes 20 communities, more likely to be 10-14 communities*
- *Task C – assumes 25 buildings/community and 20 communities, likely to be in the range of 10-14 communities, and 2-6 buildings per community*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: John Turning Consulting Inc.

DATE: 11/13/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Preliminary Information

- *Included required pages*
- *John Turner, Exec (Bangor)*
- *Alan Rogers, Director of Sustainability & Energy, Point of Contact (Portsmouth)*

II. Organization Qualifications and Experience

- *Overview of Organization*
 - *John Turner Consulting Inc*
 - *Offices in Lisbon and Bangor*
 - *Expanded services in 2023 to provide Sustainability & Energy services (so a fairly new service)*
 - *140 professionals*
 - *As part of services, provide facility audits, LED retrofits, lighting controls, HVAC retrofits, refrigeration retrofits, and thermal envelope and air barrier installation*
 - *Projects/Experience:*
 - *Municipal Energy Resilience Program*
 - *Audits for 41 buildings across 23 communities in VT*
 - *Included fire stations, town offices, libraries, wastewater treatment facilities, rec centers*
 - *Good swath of experience that aligns with the selected buildings for this program.*
 - *This project overall seems to mirror the RFP project, minus benchmarking trainings*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: John Turning Consulting Inc.

DATE: 11/13/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

- *Provided 3 buildings that were support through this program*
- *Some of the projects included PV recommendations, EV charging recommendations*
- *Used EnergyStar EUI ratings, so might involve some benchmarking?*
- *Included energy audits, recommendations based on audits and historical energy use, and cost estimates and payback periods.*
- *Subcontractors*
 - *None*
- *Organizational Chart*
 - *Provided this. Simple organizational chart, no subcontractors.*
 - *Would benefit from more detail on how each of these team members will be involved in this specific project.*
- *Litigation*
 - *None*
- *Financial Viability*
 - *Included in Appendix A*
 - *\$5 million in assets and liability*
- *Licensure/Certification*
 - *Includes CEM, Building Operator Cert, Building Performance Institute certification (pending recertification)*
- *Certificate of Insurance*
 - *Included*
- III. *Proposed Services*
 - *Services to be Provided*
 - *A. Provide Energy Audits on Publicly Owned Buildings in Maine Communities*
 - *Utilize advanced diagnostic tools, including blower door testing, infrared thermography, and combustion analyzers*
 - *Comprehensive data collection, including building characteristics, energy consumption patterns, occupancy schedules, and equipment specs*
 - *Occupant feedback*
 - *In depth system analysis, including HVAC, lighting, building envelope, water heating*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: John Turning Consulting Inc.

DATE: 11/13/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

- *Only seems to provide a general outline with no specifics around how they will interact with the communities, what level of audit will be used, how they will cover audits across the state, who will complete the audits, etc*
- **B. Train Communities on EnergyStar Portfolio Manager**
 - *Discuss providing customized training modules and interactive workshops*
 - *In person and virtual trainings*
 - *Guidance on gathering necessary data/info*
 - *Account setup guidance (but not necessarily support?)*
 - *Pre-Training assessment of community's current data practices and available info to tailor the trainings (so assuming one on one trainings?)*
 - *Post trainings support through follow up sessions and troubleshooting*
 - *Do not provide any specifics around how many trainings, what the trainings will cover, how the trainings will be developed, the size of the groups for trainings, GOPIF feedback, materials that will be provided to the communities*
 - *Does not provide a plan for how benchmarking will be supported for the 2-6 buildings, such as specific support with data and building input*
- **C. Develop Energy Conservation Implementation Plans for Communities**
 - *Analyze energy audit results and benchmarking data to identify key areas for improvement for each building*
 - *Detailed energy calculations in different scenarios*
 - *Prioritized list of improvements tailored to each community's needs and budgets*
 - *Does not describe how these needs and budgets will be identified. Stakeholder engagement, community staff meetings, etc?*
 - *Comprehensive Cost Estimate*
 - *Financial Analysis and Funding Opportunities*
 - *Compile list of local, state, and federal opportunities*
 - *Calculate payback times for each project*
 - *Greenhouse Gas emissions reduction analysis*
 - *Integrated clean energy and electrification planning*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: John Turning Consulting Inc.

DATE: 11/13/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

- *This is a value add that they seem to have experience in that was not required in the RFP*
 - *Includes solar, battery storage, and EV charging stations*
 - *General stakeholder engagement, working with community leaders*
 - *Supervision*
 - *Says they will “work with contractors during the implementation of these plans to ensure they are properly executed for optimal performance”*
 - *Does this mean they will be available in the future when these communities implement the identified projects? Is this an over-reach or helpful?*
 - *D. Develop an Energy Efficiency and Conservation Guidebook*
 - *Develop content*
 - *Develop user friendly tools and templates*
 - *Like what? This would benefit from more specifics on what these templates and tools would accomplish*
 - *Integrate case studies*
 - *Test usability on reps from rural communities*
 - *Will include maintenance plan*
 - *This section is okay.*
 - *In work plan, includes the development of an interactive dashboard, but this is not discussed in the proposed services section. Does not include experience doing such as project or what the benefit would be.*
 - *E. Submit Quarterly and Final Performance Reports*
 - *This is not addressed*
 - *Implementation – Work Plan*
 - *Work plan breaks down some of the tasks into further subtasks*
 - *Includes 2 JTC teams. Does not identify why.*
 - *Includes 4 phases of implementing Tasks A-D.*
- IV. *Cost Proposal*
 - *Will need to reach out to confirm assumptions*
 - *Does not provide detail around assumptions, such as how many buildings, how many communities, size of buildings, travel distance*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: John Turning Consulting Inc.

DATE: 11/13/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

- *\$436,000 for quarterly and final performance reporting is way too high, especially with no supporting material included in the proposed services or work plan*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: NORESCO

DATE: 11/17/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

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Individual Evaluator Comments:

I. Preliminary Information

- *Brian Rieder, VP, Sustainability Services*
- *John Balfe, Project Manager*
-

II. Organization Qualifications and Experience

- *Overview of Organization*
 - *NORESCO*
 - *Energy services company, demand-side management and sustainability consulting, 40 years of experience*
 - *Services include energy auditing, design and construction, and retro-commissioning*
 - *Experience*
 - *Decarbonization Roadmap Development*
 - *Gave general information on these services, but provided no specifics*
 - *Worked with municipal and state agencies on buildings*
 - *Decarbonization Assessments*
 - *Experience Developing Energy Star and Benchmarking Training*
 - *Worked with Urban Green Council, California industries, CBECC*
 - *Experience developing training materials and presentations*
 - *Technical Handbooks and Manuals*
 - *Such as those for building codes and retrofits*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: NORESCO

DATE: 11/17/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

- *Energy Audits on more than 10,000 facilities worldwide*
- *Specific Experiences*
 - *ASHRAE – Building Decarbonization Guide*
 - *Related experience*
 - *Frameworks on HVAC, hot water systems, energy, electrical load*
 - *Texas Stat Energy Conservation Office – Statewide Energy Audits*
 - *Assess energy use of each building and identify opportunities to lower GHG emissions and energy consumption*
 - *Well aligned experience, over 90 buildings (similar scale to this project)*
 - *New York Department of Design and Construction (on call contract)*
 - *Energy audits and retro-commissioning at more than 286 facilities, including schools, public buildings, office buildings*
 - *Strategic approach to comprehensive electrification assessments on 14 city owned sites*
 - *Well aligned experience with a larger state*
- *Subcontractors*
 - *Northeast Energy Efficiency Partnerships, INC (NEEP) serving as subconsultant*
 - *Nonpartisan nonprofit org, with mission to accelerate affordable equitable clean energy transition in Northeast and MidAtlantic region, provides TA to states and jurisdictions*
 - *Have experience with key energy efficiency technology and deep knowledge of local, state, and federal policies and incentive programs*
 - *Experience with benchmarking and plans/toolkits*
 - *Woburn, MA*
 - *Michael Anderson, Senior Manager, Community Solutions*
- *Organizational Chart*
 - *Provided organization chart, mostly of NORESCO team members, two co-directors and a project manager*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: NORESCO

DATE: 11/17/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

- *Led by John Balfe, Noresco*
- *Supported by team of engineers, subject experts, and support from NORESCO, one consultant member Michael Anderson, Senior Manager, Community Solutions, NEEP—no resume provided for NEEP member*
- *Might benefit from a more clear explanation on how each member of NEEP will support each of the project tasks, vs what John Balfe will support directly*
- *Litigation*
 - *May have some litigation. Provided statement on ongoing litigation.*
 - *As a national energy services and construction company, NORESCO is, from time to time, involved in litigation in the ordinary course of its business. NORESCO has no past or present litigation which, if decided adversely, would impair NORESCO's ability to perform the services described in this RFP.*
- *Financial Viability*
 - *NORESCO possesses more than sufficient financial stability and resources to meet its obligations under This engagement. NORESCO, LLC is owned by Carrier Global Corporation. Carrier was founded in 1915, and as of 20223 was a \$22.1 billion company with more than 53,000 employees, globally.*
 - *Included hyperlinks to financial statements – unclear if this fulfills the requirement set by the RFP*
 - *Pages were not found when clicking the hyperlinks*
- *Licensure/Certification*
 - *Provided*
 - *Included certified energy auditor*
- *Certificate of Insurance*
 - *Provided*

III. Proposed Services

- *Services to be Provided*
 - *A. Provide Energy Audits on Publicly Owned Buildings in Maine Communities*
 - *Assurance of providing audits statewide*
 - *Kickoff meeting, building and information request (virtual)*
 - *3 years historic energy and water invoices*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: NORESCO

DATE: 11/17/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

- *Electric interval demand data*
- *Other building information on equipment, use, and energy use*
- *Clearly explained, demonstrated clear understanding of audit needs*
- *Preliminary Energy Use Analysis*
 - *Provided list of analyses, including EUI comparison, load factor, utility rate/tariff analysis, etc.*
- *Interview O&M Staff*
 - *Detailed interviews*
 - *Thoughtful part of the process, but might be taxing on busy staff*
- *Site Inspection Survey*
 - *HVAC*
 - *Hot water heater*
 - *Interior and exterior lighting*
 - *Lighting control system*
 - *Visual inspection of building envelope*
 - *As required, NORESCO will install its own NIST calibrated Measurement and Verification (M&V) equipment to take instantaneous measurements. This includes a flue gas analyzer for boiler combustion efficiency, power meters to measure pump/fan and other HVAC equipment power use (volts, amps, kW, and power factor), light meters for space lighting levels, anemometers for HVAC airflow measurement, ultrasonic flow meters for hydronic flow measurement, airside and waterside pressure gauges and differential pressure instruments for pressure and differential pressure readings that could be used for flow, digital temperature equipment and relative humidity meters. When necessary and possible, NORESCO also has an inventory of temperature, humidity, CO2, power and hydronic flow meters with data logging capability.*
 - *What/who do they think requires this?*
 - *What level audit are they providing?*

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- *Identify Potential Decarbonization and Energy Conservation Measures*
 - *Will allow for review from personnel and incorporate feedback into energy conservation plans*
- *Savings Calculations*
 - *Using proprietary spreadsheets*
 - *Includes GHG emissions savings*
 - *Energy savings accuracy is +/-20%.*
- *Cost Estimates*
 - *Using mix of past experience, RSMeans, and quotes from vendors*
 - *Please note that implementation cost accuracy is +/-20%.*
- *Decarbonization and Energy Conservation Measures*
 - *Rank measures by customer objectives, typically by payback time*
 - *Tabulated Savings, Existing Condition Descriptions, Recommendations (to be used for the basis of bidding the measure)*
- *Prepare Information to be Included in Energy Conservation Implementation Plans*
 - *The following information from the audit will flow directly into the Energy Conservation Implementation Plans:*
 - *Building information/Equipment list*
 - *Utility summary/Historic energy consumption analysis results*
 - *Energy conservation measure summary*
 - *Infrastructure and measures for future consideration*
 - *Operation and maintenance measure summary*
 - *Next steps: Conclusions and recommendations*
 - *Appendix sections as required providing additional detail supporting the above sections.*
- *B. Train Communities on EnergyStar Portfolio Manager*
 - *Experience with Portfolio Manager, with building owners, facilities managers, and municipal officials*
 - *Meeting with each community to identify needs, challenges with benchmarking and training*

**STATE OF MAINE
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- *Develop materials based on initial convo and existing materials*
 - *Demonstrates understanding of utility challenges and how to overcome these*
 - *Details what will be included in trainings, why benchmarking is important and what it is, account setup, data input, obtaining data, adding properties, sharing data, analysis*
 - *Will collect feedback from GOPIF and local level stakeholder on training materials*
- *Virtual and onsite trainings, depending on community*
- *7 onsite trainings, with remainder virtual*
- *The goal will be to engage as many members of the community as possible in a single session. Does not focus on the municipal officials and the 2-6 buildings. Unclear who these trainings are for. Might mean as much staff as possible.*
- *Share materials after trainings. Collect feedback through Microsoft Form.*
- *Provide ongoing assistance. Will record training and document process to provide to each community in case of staff turnover.*
- *Appreciate benchmarking approach. Thorough. And will be useful for other communities in Maine not participating directly in the program.*
- *C. Develop Energy Conservation Implementation Plans for Communities*
 - *Focus on project prioritization and development process to help low capacity community understand priorities and how to build project into their capital plans*
 - *Analyze audit results*
 - *Evaluate Energy Improvements using building simulations, calculate potential impact of each measure and payback*
 - *Evaluate highly efficiency building envelope, weatherization and air sealing, LED lighting and controls, space heating and cooling, domestic water heating, advanced building control systems,*

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EVALUATOR DEPARTMENT: GOPIF

- renewable energy, energy storage systems, and other distributed generation sources*
 - *Account for capital costs and 20-year operations cost*
 - *Develop Templated Implementation Plan*
 - *Shared with State and local leaders to gain perspective and buy in*
 - *Finalize Community-Specific Implementation Plans*
 - *Thorough outline of these plans*
 - *Thoughtful, includes thoughtful funding integration and integration into existing building systems*
 - *Research and Synthesize Funding Opportunities*
 - *This section seems more vague, seems like simply a list of available funding instead of matching funding to relevant projects*
 - *Will meet with key decision makers in each community to convey the findings*
 -
- *D. Develop an Energy Efficiency and Conservation Guidebook*
 - *Have experience creating similar guidebooks*
 - *Demonstrate understanding on the task*
 - *Will in addition to energy efficiency and electrification include information on clean energy and microgrids*
 - *4-8 common building types to use as reference buildings, as determined through auditing process and implementation plans*
 - *No longer than 40 pages so it is easily digestible*
 - *Clear vision, targeting the needs of low capacity rural communities*
 - *Will work with NEEP on this task, especially in terms of funding sources and cold climate heat pumps and VRFs*
 - *Meet with Community Leaders*
 - *Draft Guidebook Outline*
 - *Appreciate current outline and how it clearly breaks down what a community can do on their own and how to identify when they need a specialist*
 - *This is a strong section*
 - *Develop Content and Format for Guidebook*

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EVALUATOR DEPARTMENT: GOPIF

- *Open to whatever format the state would like, webpage, presentation, traditional report*
- *Obtain feedback*
 - *Two rounds of peer review from State and select communities*
- *Update guidebook at the end of the audit period*
-
- *E. Submit Quarterly and Final Performance Reports*
 - *Will hold kickoff meeting with State upon NTP*
 - *Will hold regular meetings with State and communities throughout process*
 - *Lays out how each NORESCO member will support the project, Technical Lead will oversee field audits*
 - *Clear methods to ensure quality and timely progress*
- *Audit assumptions*
 - *Typical buildings*
 - *10,000 – 75,000 sf*
 - *Wastewater treatment plants and water pump stations would be priced on a custom basis*
 - *Similar to ASHRAW Level 2 audit – is this necessary for this project?*
-
- *Implementation – Work Plan*
 - *Reasonable*
 - *Leaves room for buffer*
 - *Completes audits by end of year 1 for all*

IV. Cost Proposal

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202408156

RFP TITLE: Energy Efficiency Planning for Rural Communities

BIDDER NAME: PowerOptions

DATE: 11/17/2024

EVALUATOR NAME: Casey Zorn

EVALUATOR DEPARTMENT: GOPIF

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

- I. Preliminary Information
- II. Organization Qualifications and Experience
 - Overview of Organization
 - PowerOptions, Inc
 - Largest buying consortium in New England, serve over 500 organizations (non profits and public entities) as a trusted energy advisor in Massachusetts, RI, and CT
 - Mission to empower nonprofits and public entities with energy solution to reduce cost, carbon, and complexity of energy
 - Since 1998
 - Supported 280 public entities with energy needs
 - Services include energy efficiency, Energy Star portfolio manager, and building decarbonization road mapping
 - PowerOptions Energy Sustainability and Analytics program, since 2021
 - Experience:
 - Massachusetts Clean Energy Center
 - 2022
 - Buildings Electrification Transformation Accelerator: Roadmaps program
 - Provide decarbonization plans (include energy efficiency, on-site solar, and electrification) to over 30 municipalities and nonprofits
 - 35 implementation plans, 180 buildings, 8.6 million sf
 - YMCA of Greater Boston

**STATE OF MAINE
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EVALUATOR DEPARTMENT: GOPIF

- *Member org of PowerOptions*
- *Reports energy and water data on EnergyStar Portfolio Manager on behalf of YMCA for buildings subject to Boston ordinance*
- *Energy efficiency and electrification plan as described in Activity 1, using remote audit software*
- *Energy efficiency and decarbonization advisory consulting via biweekly calls*
- *Barrington NH Community Center*
 - *ASHRAE Level II Audit, June 2023*
 - *Benchmarking and audited building*
- *All relevant experiences*
- *Subcontractors*
 - *Resilience Buildings Group, Inc (RBG) – Tasks A, B, and D*
 - *Cassidy Crawford, contact person*
 - *Concord, NH 2013*
 - *Building consulting services, including benchmarking, energy audits, retrofits, LEED, etc. throughout New England, including Maine*
 - *Has completed ASHRAE Level I and II audits for municipalities, schools, and public institutions*
 - *Has worked to secure federal funds, state funds, utility incentives and rebates, PUC rebates, and low-interest loans for projects*
 - *GDS Associates, Inc (GDS) – Task A, B*
 - *Michael Coty, contact*
 - *1986*
 - *More than 190 engineers and consultants in nine locations in US, Bedford, NH*
 - *benchmark energy use, identify opportunities for energy and greenhouse gas reductions, evaluate clean energy alternatives and improve resiliency*
 - *Experience with incentives programs*
 - *Provide energy engineering and consulting services for this project*
 - *Hundreds of commercial and industrial ASHRAU Level I, II, and II energy audits throughout New England*

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- *GDS Bedford NH engineering team will support this operates completely independently from Augusta, ME office. No crossover in staff or clients. No GDS employees who support Efficiency Maine implementation will have any involvement or insight.*
 - *Do we have a problem with this?*
 - *This is why GDS will not support Task C*
- *Organizational Chart*
 - *Provided, confusing*
 - *Provides overall chart for PowerOptions whole operations*
 - *Primary contact, Erin Camp PhD, formerly worked for Cadmus on public sector clients*
 - *Decade of experience*
 - *This would benefit from a organizational chart of all of the team members for this specific project*
- *Litigation*
 - *None*
- *Financial Viability*
 - *Provided 3 years*
 - *Provide independent auditor's reports for each year*
 - *In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of PowerOptions, Inc and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.*
- *Licensure/Certification*
 - *Provided*
- *Certificate of Insurance*
 - *Provided*

III. Proposed Services

- *Services to be Provided*
 - *A. Provide Energy Audits on Publicly Owned Buildings in Maine Communities*
 - *Unclear how they will determine RBD or GDS involvement in this task, how the two subcontractors will split the work*
 - *Comprehensive Level II Audits for all buildings*

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- *RBD and GDS will collaborate on the preliminary analysis of building pre-audit*
 - *Including existing conditions, present and future use, capital improvement plans, etc*
 - *Operating equipment, envelope, HVAC, hot water, other systems*
 - *Thermal comfort survey to building occupants*
- *Building site visit conducted by RBG and GDS*
 - *Will include health and safety concerns*
 - *Interviews*
 - *Interior lighting*
 - *Blower door test*
 - *IR imaging*
 - *Data loggers within building to log humidity, temperature, carbon dioxide, lighting level, occupancy patterns, energy usage*
 - i. *1-3 weeks*
- *Deliver ASHRAE Level II Audit report to PowerOptions to integrate into Task C*
 - *Existing conditions of envelope*
 - *Existing condition of mechanical systems*
 - i. *Does not note water heating?*
 - *Existing condition of electrical system*
 - *Notable Issues Section*
 - *Energy Usage Analyses Section*
 - i. *EUI*
 - *Interior Environment Analysis*
 - *Energy Efficiency Measures Recommendation Section*
 - *Financial Analysis*
- *B. Train Communities on EnergyStar Portfolio Manager*
 - *Will split communities amongst 3 consultants (PowerOptions, RBG, GDS)*
 - *Will have preliminary call with each community*
 - *Will set up accounts for them and benchmark on their behalf and then present portfolio*
 - *1-2 hours of training per community with ongoing support and custom selection of resources*

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- *Create curriculum together at start of project*
- *Unclear how the trainings will be given, over phone, via Zoom, in person??*
- *Understand pitfalls of benchmarking for small low capacity communities*
- *Would want to train multiple employees at once*
- *Weaker section, even though they have a lot of experience across their team members*
- *C. Develop Energy Conservation Implementation Plans for Communities*
 - *Led by PowerOptions, supported by GDS? Unclear*
 - *10-15 page report per community*
 - *Provide outline of each plan, clear and reasonable*
 - *Includes time for feedback sessions with building owner and GOPIF team*
 - *Willing to provide a 1-hour presentation of roadmap with leadership teams for each community*
 - *Combination of desktop analysis and results of onsite audits*
 - *BETTER tool for efficiency*
 - i. *99% accuracy on potential energy savings compared to ASHRAE Level II audit*
 - ii. *Opportunity to test the tool's performance against audits for municipal buildings in Maine*
 - *Helioscope + PowerOptions solar financial model*
 - *Power Options model and audit for electrification*
 - *Will include energy conservation measures, assessment of onsite solar PV, and installation of high efficiency electric alternatives*
 - *Will include*
 - *Prioritized list of projects with timing and trigger events*
 - *Cost estimates and payback times*
 - *Funding options/opportunities for each project*
 - *Potential annual GHG emissions reductions for each project*
 - *GDS will leverage its experience in Maine and connections with Efficiency Maine to estimate state incentives for both prescriptive and custom projects.*

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- *I feel like it was explicitly stated that they would not do this and would not be involved in this part of the project*
- *D. Develop an Energy Efficiency and Conservation Guidebook*
 - *During Task C, will compare audits to desktop results, and if promising, will include guidance for how municipalities can use the virtual software to do initial assessment*
 - *Can they use this software for free? Will this software be too complicated for them?*
 - *Led by PowerOptions, Collaboration between all 3 team organizations*
 - *Will incorporate lessons learned in earlier tasks*
 - *Will provide brief instruction to GOPIF on how to update guidebook over time*
 - *Experience with municipal customers*
 - *Opportunity for GOPIF feedback*
- *E. Submit Quarterly and Final Performance Reports*
- *Implementation – Work Plan*
 - *1 month per report for Task C*
 - *Would benefit from breakdown by subtask for Gantt Chart— doesn't provide a clear plan*
 - *Task D on Gantt only shows formal writing and editing process, though material will be compiled throughout process*
 - *Weak point of the application, the timeline does not say much*

IV. Cost Proposal

- *Could we bring down cost of audits by requesting mostly ASHRAE level I audits?*



STATE OF MAINE
Governor's Office of Policy Innovation
and the Future

Janet T. Mills
Governor

Hannah Pingree
Director

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202408156
RFP TITLE: Energy Efficiency Planning for Rural Communities

I, Brian Ambrette , accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Governor's Office of Policy Innovation and the Future. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

I have not advised, consulted with or assisted any bidder in the preparation of any proposal submitted in response to this RFP nor have I submitted a letter of support or similar endorsement.

I understand and agree that the evaluation process is to be conducted in an impartial manner without bias or prejudice. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

I agree to hold confidential all information related to the contents of Requests for Proposals presented during the review process until such time as the Department formally releases the award decision notices for public distribution.

A handwritten signature in black ink, appearing to read 'Brian Ambrette'.

11/13/2024

Signature

Date



STATE OF MAINE
Governor's Office of Policy Innovation
and the Future

Janet T. Mills
Governor

Hannah Pingree
Director

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202408156
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I, Ross Anthony, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Governor's Office of Policy Innovation and the Future. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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A handwritten signature in black ink, appearing to read 'R. Anthony'.

11/7/2024

Signature

Date



**STATE OF MAINE
Governor's Office of Policy Innovation
and the Future**

Janet T. Mills
Governor

Hannah Pingree
Director

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202408156
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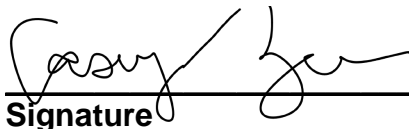
I, Casey Zorn, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Governor's Office of Policy Innovation and the Future. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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Signature

11/06/2024

Date