

Request for Quote: Facilitation Services for Electric Vehicle Infrastructure Coordinating Council (EVICC)

Massachusetts Executive Office of Energy and Environmental Affairs

PRF74: Energy, Climate Action, and Facility Advisory Services

Issued by: EEA

February 28, 2023

QUOTES DUE: March 25th, 2023

Purpose of Solicitation

In support of the Commonwealth's Electric Vehicle Infrastructure Coordinating Council ("EVICC") the Massachusetts Executive Office of Energy and Environmental Affairs ("EEA") is soliciting qualified facilitation firms with demonstrated experience in managing communication processes and public hearings to support the Council.

The primary task of the Council is to create a comprehensive plan to build electric vehicle charging infrastructure in Massachusetts sufficient to achieve the state's aggressive goals for electrification of transportation, including the requirement that all new light duty vehicles purchased in Massachusetts will be zero-emission by 2035, in addition to increasingly stringent requirements for medium and heavy-duty vehicles.

Scope of Work and Tasks:

The Contractor will play a key role in organizing and facilitating the EVICC's deliberation process and will support the Council in driving toward and documenting their recommendations. The primary scope of work is provided below. Applicants may suggest additional tasks and/or expanded scope beyond the tasks listed below.

Specifically, the selected Contractor will complete the following tasks:

- Provide guidance, ground rules, and structure for the Council's deliberation process, including discussing the overarching goals and objectives.
- With Chair, set meeting agendas and coordinate speakers for different topics.
- Coordinate three public meetings in diverse areas of the Commonwealth, as required by the enabling legislation.
- Guide the Council members to reach agreement on recommendations, including structuring all the Council's meetings, workshops, and conversations.
- Help the Commission and EEA in developing a plan and delivering on that plan, for public consultation and engagement around the work that the Commission takes on.
- Facilitate meetings with guidance and input from Council Chair.
- Support the Council in identifying data and analysis needs and coordinate any associated research, analysis, or modelling work with the Task Force and/or external consultants. Integrate results into

Council process to provide analytical insights and address questions/needs from the Council process. Integrate external expert presentations and testimony into process.

- Provide support for Council members in finding common ground.
- Drive process to actionable recommendations within the timeframe specified.
- Maximize Council agreement while maintaining consistency with policy requirements and specified greenhouse gas emission reduction goals.

The Contractor will not be expected to undertake the following tasks:

- Set the specific timeline of the deliverables: the timeline for the Council process will be established by EEA, with some consultation with the Contractor.
- Propose or make recommendations for Policy options, emissions limits/sub-limits, and Supporting Initiatives: Policy options, and emissions limits/sub-limits, and Supporting Initiatives will be proposed and discussed by the Council. The facilitator will be asked to help guide Council members through associated deliberations, refinement, and recommendations.
- Conduct research, analysis, or economic or energy system modelling: the Task Force, EEA staff, and/or other consultants will support research, analysis, and modelling. However, the Contractor will need to support dissemination and consideration of results.

Qualifications & Eligibility

Applicants may be sole proprietors or companies/non-profits with multiple employees. Individual entities may apply as part of multiple Applicant teams. Applicant teams should have one entity that takes responsibility for organizing the team and proposal (“Lead Applicant”).

Applicants must have the experience and capabilities described below:

- Stakeholder Engagement Process Strategy and Planning: Success in planning and establishing effective stakeholder engagement processes around complex issues with participants holding diverse perspectives, with significant financial implications for individuals or individual businesses. Proven success in supporting stakeholders in reaching agreement on issues of significance.
- Facilitation: Demonstrated, successful facilitation experience in high profile, public, and transparent processes. History of clear and effective documentation and report writing.
- Conflict Resolution: Demonstrated ability to manage and work through stakeholder conflicts, conflicting information, disputes of fact, and other potential hurdles.
- Fluency in Public Policy: Detailed understanding of state regulatory environments and process.
- Familiarity with Transportation Policy and Decarbonization: Broad understanding and ability to effectively converse around policies, markets, and technologies related to transportation emissions, particularly vehicle electrification and charging infrastructure.
- Team and Key Stakeholder Management: Ability to build rapport with team members, including effectively integrating with team leaders and the supporting team members’ efforts.

EEA strives to partner with organizations, companies, and entities that consciously work to create a diverse, equal, and inclusive work environment. EEA encourages such partners to have Diversity, Equity & Inclusion (“DEI”) policies that encourage hiring a diverse team, provide equal and fair treatment for all team members, and ensure a workplace environment where all team members feel valued and have the opportunity to fully participate in creating organizational success.

Estimated Procurement Calendar

This timeline is subject to change at EEA’s discretion.

Bid Available Date	March 1, 2023
Deadline for Submission of Questions through COMMBUYS “Bid Q&A”	March 15, 2023, 2:00PM EST
Official Answers for Bid Q&A published (Estimated)	March 22, 2023
Deadline for Quotes/Bid Responses (“Bid Opening Date/Time” in COMMBUYS)	March 27, 2023, 2:00PM EST
Interviews for Selected Bidder(s) Bidders will be notified individually to schedule the interview.	Week of March 27, 2023
Notification of Apparent Successful Bidder(s) (Estimated)	Week of April 3, 2023
Estimated Contract Start Date	April 10, 2023

Requirements for Quotes

Proposals will be evaluated on the criteria below:

Completeness of Proposed Approach (20%)

- Does the Applicant plan to provide services commensurate with the Tasks requested by EEA?
- Has the Applicant’s proposed approach demonstrated insight into additional needs in the Council process or proposed additional and valuable recommendations?

Experience and Qualifications (20%)

- To what extent does the Applicant demonstrate the eligibility criteria?
- Has the Applicant successfully completed projects similar or relevant to the proposed work?
- Is the applicant a participant of the Commonwealth’s Small Business Purchasing Program?

Cost Competitiveness (20%)

- How does the Applicant’s hourly rate compare to other Applicants?
- How does the Applicant’s proposed maximum fee compare to EEA suggested cap and the fee proposed by other Applicants?

- How does the scale and quality of the proposed scope compare to the maximum fee?

Overall Quality of Proposal (20%)

- Does the Applicant demonstrate an understanding of the concepts and motivators underlying the effort?

Applicant Team (if applicable) (20%)

- Does the partnership have a history of collaboration?
- Does the partnership have a clear structure for collaboration?

The above materials shall be submitted in word or PDF format through the COMMBUYS system by March 27, 2023, 2:00pm EST.

Bidder Submissions shall remain valid for at least one hundred eighty (180) days from the due date for responses. Final Selection will be based on the quality of bidders' responses, relevant experience, staffing and budget proposals, and references. EEA reserves the right to conduct interviews as appropriate.

EEA intends to evaluate responses to this request for quotes, award the task order, and negotiate a final scope of work and schedule on or before April 10, 2023.

Reimbursement and Billing

The compensation structure for the PRF74 contract is project based according to individual projects as described and agreed to in the SoW and the accepted bidder response and shall include all ancillary costs incurred in pursuit of project goals. Awarded vendors are required to provide specific and transparent prices in all responses to bid quotation requests. Vendors are not allowed to charge additional fees under this contract. This includes, but is not limited to, charges for permits, set-up, quotes, travel, transportation, commuting, meals, lodging, and any other fee.

Budget

EEA anticipates contracting with one (1) Contractor for the tasks described in Section 6. Applicants should submit a proposal and budget that provides services to meet this scope. Applicants are encouraged to propose additional tasks that they believe will enhance their ability to achieve the goals of this RFQ.

For the purposes of budgeting, Applicants should assume a Council process consisting of twelve (12) two and one-half (2.5) to four (4) hour meetings over the course of twelve (12) months. Please note that this does not necessarily represent the exact structure of the Commission process, which will be finalized after the RFQ is completed. Applicants should budget around this example structure and propose hourly rates which could account for the final process requiring more or less effort.

EEA anticipates that the contract will be awarded on a time and materials basis with a not-to-exceed value for the Tasks described above (and any others mutually agreed upon). The expected lifetime value of this contract is \$100,000.00.

EEA, upon prior written notice, may terminate this engagement without cause and without penalty, or may terminate or suspend an engagement if the Contractor breaches any material term or condition or fails to perform or fulfill any material obligation required by this engagement, or in the event of an elimination of an appropriation or absence of sufficient funds for the purposes of an engagement, or in the event of an unforeseen public emergency mandating immediate EEA action.

Contract duration

The initial duration of this contract will be through June 30, 2024. EEA will have one option to renew for up to one year.

Submittal Deadline

All quotes must be submitted via COMMBUYS by 2:00pm EST on March 27, 2023.

Small Business Purchasing Program (SBPP)

Program Background. The Massachusetts [Small Business Purchasing Program](#) (SBPP) was established pursuant to [Executive Order 523](#) to increase state contracting opportunities with small businesses having their principal place of business within the Commonwealth of Massachusetts. Pursuant to the SBPP, it is the intention of the issuing department to award this Small Procurement to one or more SBPP participating business(es) as described below.

SBPP Award Preference. While all businesses, no matter the size or principal place of business, may submit responses to this solicitation, should an SBPP participant respond and meet the best value criteria as described in this solicitation, the SBPP participant shall be awarded the contract. The Strategic Sourcing Services Team (SST) will not evaluate submissions from non-SBPP participants unless no SBPP Bidder meets the SSST's best value evaluation criteria.

SBPP Participation Eligibility. To be eligible to participate in this procurement as an SBPP participant, an entity must meet the following criteria, and be marked as an SBPP registered business in [COMMBUYS](#):

1. Have its principal place of business in the Commonwealth of Massachusetts;
2. Been in business for at least one year;
3. Employ a combined total of 50 or fewer full-time equivalent employees in all locations, or employees work less than a combined total of 26,000 hours per quarter; and
4. Have gross revenues, as reported on appropriate tax forms, of \$15 million or less, based on a three-year average.

Non-profit firms also must be registered as a non-profit or charitable organization with the MA Attorney General's Office and be up to date with all filings required by that office and be tax exempt under Section 501(c) of the Internal Revenue Code.

SBPP Compliance Requirements. It is the responsibility of the Bidder to ensure that their SBPP status is current at the time of submitting a response and throughout the life of any resulting contract. Misrepresentation of SBPP status will result in disqualification from consideration, and may result in debarment, contract termination, and other actions. To learn more about the SBPP, including how to apply, visit the [SBPP Webpage](#).

Program Resources and Assistance. Bidders and Contractors seeking assistance regarding SBPP may visit the SBPP webpage, <http://www.mass.gov/sbpp>, or contact the SBPP Help Desk at sbpp@mass.gov.