



ALASKA ENERGY AUTHORITY
 PROCUREMENT DEPARTMENT
 813 W Northern Lights Blvd
 Anchorage, AK 99503

RETURN BY EMAIL
procurement@aidea.org

INFORMAL REQUEST FOR QUOTATION

iRFQ NO: **25026**
 Quotations due on/before
2:00 PM Local Time 12/27/2024

Front Office Utility Training/Training-Itinerant Electric

Page 1 of 6 Date: 12/05/2024

VENDOR NOTICE (This is NOT a Purchase Order)

This is an informal quotation that will not be read at public opening. The information may be publicly reviewed after award. The terms and conditions should be reviewed and understood before preparing a quotation. The quotation shall be the best net price, FOB destination, to include all delivery charges, but exclude applicable taxes. Delivery schedule and discount for early payment shall be indicated in the spaces provided below. Return the quotation by the above time and date to the above address. Please reference the Buyer's name and the iRFQ number on the outside of the return envelope.

DELIVERY LOCATION:
 AEA Warehouse 2601 Commercial Drive,
 Anchorage AK 99501

PROCUREMENT OFFICER:
 Rachael Holly (907) 771-3055
rholly@akenergyauthority.org

VENDOR QUOTATION

Item	Description of Supply or Service	Qty	Unit	Unit Price	Extended Price
1	<p>The Alaska Energy Authority (AEA) is looking to provide Itinerant Electric Utility Management and Clerk training/technical assistance for specific Rural Alaska Electric Utilities. There have been fifty-four communities identified as eligible under this specific funding to receive this training/technical assistance. The Technical Assistance and training, provided by the contractor, is intended to assist the utility staff to become experienced with the best practices for managing their Electric utility and maximizing the PCE subsidy for the benefit of their customers. The Contractor will provide classroom instruction in Seward, Alaska at the AVTEC facility.</p> <p>Prior Experience: In order for offers to be considered responsive offerers must meet these minimum prior experience requirements: Offers are to provide minimum prior experience under "Relevant Experience and Qualifications".</p> <p>Three (3) years' experience working with small governments or utilities (serving populations under 1500) in Alaska and; Two (2) years' experience providing accounting technical assistance training, assistance, and implementation of governmental accounting processes.</p> <p>An offeror's failure to meet these minimum prior experience requirements will cause their quote to be considered non-responsive and their quote will be rejected.</p> <p>See attached Scope of Work for additional information and requirements.</p>	1	1		

THIS SECTION MUST BE COMPLETED BY VENDOR

Delivery shall be made _____ calendar days after receipt of order.
Payment Terms: _____

Company Name	Address	City	State	ZIP Code	Phone Number
Alaska Business License No.	Vendor Tax I.D. No.				
_____ Signature Date		_____ Typed Name and Title			

02-110 (03/13)

**INSTRUCTIONS TO BIDDERS
TERMS AND CONDITIONS**

1. INFORMAL REQUEST FOR QUOTATION (iRFQ) REVIEW: Offerors shall carefully review this iRFQ for defects and questionable or objectionable material. Offerors' comments concerning defects and questionable or objectionable material in the iRFQ must be made in writing and received by the purchasing authority before the date and time set for receipt of quotes. This will allow time for an amendment to be issued if one is required. It will also help prevent the opening of a defective quote, upon which award cannot be made, and the resultant exposure of offerors' prices. Offerors' original comments should be sent to the purchasing authority listed on the front of this iRFQ.

2. QUOTATION FORMS: Offerors shall use this and attached forms in submitting quotes. A photocopied quote may be submitted.

3. SUBMISSION: Quotations shall be signed where applicable and received at the designated Purchasing Office no later than as indicated.

4. QUOTE REJECTION: The State reserves the right to reject any or all quotes, combinations of items, or lot(s), and to waive defects or minor informalities.

5. EXTENSION OF PRICES: In case of error in the extension of prices in the quote, the unit prices will govern; in a lot bid, the lot prices will govern. Negligence by the vendor in preparing the quotation confers no right for the withdrawal of the quotation after it has been opened.

6. ALASKA PROCUREMENT CODE: The Procurement Code (AS.36.30) and its Regulations (2 AAC Ch. 12), are made a part of this document as if fully set forth herein. Note: AS.36.30 and 2 AAC Ch. 12 are available at most public libraries and legislative information offices; and both are available for review at Alaska State Purchasing Offices.

7. PRICES: The offeror shall state prices in the units of issue on this iRFQ. Prices quoted for commodities must be in U.S. funds and include applicable federal duty, brokerage fees, packaging, and transportation cost to the FOB point so that upon transfer of title the commodity can be utilized without further cost. Prices quoted for services must be quoted in U.S. funds and include applicable federal duty, brokerage fee, packaging, and transportation cost so that the services can be provided without further cost. Prices quoted must be exclusive of federal, state, and local taxes. If the offeror believes that certain taxes are payable by the State, the offeror may list such taxes separately, directly below the bid price for the affected item. The State is exempt from Federal Excise Tax except the following:

- Coal - Internal Revenue Code of 1986 (IRC), Section 4121 - on the purchase of coal;
- "Gas Guzzler" - IRC, Section 4064 - on the purchase of low m.p.g. automobiles, except that police and other emergency type vehicles are not subject to the tax;
- Air Cargo - IRC, Section 4271 - on the purchase of property transportation services by air;
- Air Passenger - IRC, Section 4261 - on the purchase of passenger transportation services by air carriers;
- Leaking Underground Storage Tank Trust Fund Tax (LUST) - IRC, Section 4081 - on the purchase of Aviation gasoline, Diesel Fuel, Gasoline, and Kerosene.

8. PAYMENT FOR STATE PURCHASES: Payment for agreements under \$500,000 for the undisputed purchase of goods or services provided to a State agency, will be made within 30 days of the receipt of a proper billing or the delivery of the goods or services to the location(s) specified in the agreement, whichever is later. A late payment is subject to 1.5% interest per month on the unpaid balance. Interest will not be paid if there is a dispute or if there is an agreement which establishes a lower interest rate or precludes the charging of interest.

9. PAYMENT DISCOUNT: Discounts for prompt payment will not be considered in evaluating the price you quote. However, the State shall be entitled to take advantage of any payment discount(s) offered by the vendor provided payment is made within the discount period. Payment discount periods will be computed from the date of receipt of the commodities or services and/or a correct invoice, whichever is later. Unless freight and other charges are itemized, any discount provided will be taken on full amount of invoice.

10. VENDOR TAX ID NUMBER: If goods or services procured through this iRFQ are of a type that is required to be included on a Miscellaneous Tax Statement, as described in the Internal Revenue Code, a valid tax identification number must be provided to the State of Alaska before payment will be made.

11. INDEMNIFICATION: The Contractor shall indemnify, hold harmless, and defend the contracting agency from and against any claim of, or liability for error, omission or negligent act of the Contractor under this agreement. The Contractor shall not be required to indemnify the contracting agency for a claim of, or liability for, the independent negligence of the contracting agency. If there is a claim of, or liability for, the joint negligent error or omission of the Contractor and the independent negligence of the Contracting agency, the indemnification and hold harmless obligation shall be apportioned on a comparative fault basis. "Contractor" and "Contracting agency", as used within this and the following article, include the employees, agents and other contractors who are directly responsible, respectively, to each. The term "independent negligence" is negligence other than in the Contracting agency's selection, administration, monitoring, or controlling of the Contractor and in approving or accepting the Contractor's work.

12. SEVERABILITY: If any provision of this contract is declared by a court to be illegal or in conflict with any law, the validity of the remaining terms and provisions shall not be affected; and the rights and obligations of the parties shall be construed and enforced as if the contract did not contain the particular provision held to be invalid.

13. TITLE: Title passes to the State for each item at FOB destination.

14. FILING A PROTEST: An offeror shall attempt to informally resolve a dispute with the procurement officer regarding a small procurement. If the attempt is unsuccessful, the vendor may protest the solicitation or the award of a small procurement contract under AS 36.30.320. The

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protest must be filed in writing with the commissioner of the purchasing agency or the commissioner's designee and include the following information: (1) the name, address, and telephone number of the protester; (2) the signature of the protester or the protester's representative; (3) identification of the contracting agency and the solicitation or contract at issue; (4) a detailed statement of the legal and factual grounds of the protest, including copies of relevant documents; and (5) the form of relief requested. The protester must file a copy of the protest with the procurement officer for the purchasing agency. Protests will be treated in accordance with AS 36.30.550 and 2 AAC 12.695.

15. COMPLIANCE: In the performance of a contract that results from this iRFQ, the contractor must comply with all applicable federal, state, and borough regulations, codes, and laws; and be liable for all required insurance, licenses, permits and bonds; and pay all applicable federal, state, and borough taxes.

16. SUITABLE MATERIALS, ETC.: Unless otherwise specified, all materials, supplies or equipment offered by an offeror shall be new, unused, and of the latest edition, version, model or crop and of recent manufacture.

17. SPECIFICATIONS: Unless otherwise specified in the iRFQ, product brand names or model numbers are examples of the type and quality of product required, and are not statements of preference. If the specifications describing an item conflict with a brand name or model number describing the item, the specifications govern. Reference to brand name or number does not preclude an offer of a comparable or better product, if full specifications and descriptive literature are provided for the product. Failure to provide such specifications and descriptive literature may be cause for rejection of the offer.

18. FIRM OFFER: For the purpose of award, offers made in accordance with this iRFQ must be good and firm for a period of ninety (90) days from the date of quote opening.

19. QUOTE PREPARATION COSTS: The State is not liable for any costs incurred by the offeror in quote preparation.

20. CONSOLIDATION OF AWARDS: Due to high administrative costs associated with processing of purchase orders, a single low quote of \$50 or less may, at the discretion of the State, be awarded to the next low offeror receiving other awards for consolidation purposes. This paragraph is not subject to the protest terms enumerated in "FILING A PROTEST" above.

21. CONTRACT FUNDING: Offerors are advised that funds are available for the initial purchase and/or the first term of the contract. Payment and performance obligations for succeeding purchases and/or additional terms of the contract are subject to the availability and appropriation of funds.

22. CONFLICT OF INTEREST: An officer or employee of the State of Alaska may not seek to acquire, be a party to, or possess a financial interest in, this contract if (1) the officer or employee is an employee of the administrative unit that supervises the award of this contract; or (2) the officer or employee has the power to take or withhold official action so as to affect the award or execution of the contract.

23. ASSIGNMENT(S): Assignment of rights, duties, or payments under a contract resulting from this iRFQ is not permitted unless authorized in writing by the procurement officer of the contracting agency. Quotes that are conditioned upon the State's approval of an assignment will be rejected as nonresponsive.

24. SUBCONTRACTOR(S): Within five (5) working days of notice from the state, the apparent low bidder must submit a list of the subcontractors that will be used in the performance of the contract. The list must include the name of each subcontractor and the location of the place of business for each subcontractor and evidence of each subcontractor's valid Alaska business license.

25. FORCE MAJEURE (Impossibility to perform): The parties to a contract resulting from this iRFQ are not liable for the consequences of any failure to perform, or default in performing, any of its obligations under the contract, if that failure or default is caused by any unforeseeable Force Majeure, beyond the control of, and without the fault or negligence of, the respective party. For the purposes of this Agreement, Force Majeure will mean war (whether declared or not); revolution; invasion; insurrection; riot; civil commotion; sabotage; military or usurped power; lightning; explosion; fire; storm; drought; flood; earthquake; epidemic; quarantine; strikes; acts or restraints of governmental authorities affecting the project or directly or indirectly prohibiting or restricting the furnishing or use of materials or labor required; inability to secure materials, machinery, equipment or labor because of priority, allocation or other regulations of any governmental authorities.

26. LATE QUOTES: Late quotes are quotes received after the time and date set for receipt of the quotes. Late quotes will not be accepted.

27. CONTRACT EXTENSION: Unless otherwise provided in this iRFQ, the State and the successful offeror/contractor agree: (1) that any holding over of the contract excluding any exercised renewal options, will be considered as a month-to-month extension, and all other terms and conditions shall remain in full force and effect and (2) to provide written notice to the other party of the intent to cancel such month-to-month extension at least thirty (30) days before the desired date of cancellation.

28. DEFAULT: In case of default by the contractor, for any reason whatsoever, the State of Alaska may procure the goods or services from another source and hold the contractor responsible for any resulting excess cost and may seek other remedies under law or equity.

29. DISPUTES: If a contractor has a claim arising in connection with a contract resulting from this iRFQ that it cannot resolve with the State by mutual agreement, it shall pursue a claim, if at all, in accordance with the provisions of AS 36.30.620 – 632.

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30. GOVERNING LAW; FORUM SELECTION: A contract resulting from this iRFQ is governed by the laws of the State of Alaska. To the extent not otherwise governed by section 29 of these Standard Terms and Conditions, any claim concerning the contract shall be brought only in the Superior Court of the State of Alaska and not elsewhere.

31. CONSUMER ELECTRICAL PRODUCT: AS 45.45.910 requires that "...a person may not sell, offer to sell, or otherwise transfer in the course of the person's business a consumer electrical product that is manufactured after August 14, 1990, unless the product is clearly marked as being listed by an approved third party certification program." Electrical consumer products manufactured before August 14, 1990, must either be clearly marked as being third party certified or be marked with a warning label that complies with AS 45.45.910(e). Even exempted electrical products must be marked with the warning label. By signature on this quote the offeror certifies that the product offered is in compliance with the law. A list of approved third party certifiers, warning labels and additional information is available from: Department of Labor, Labor Standards & Safety Division, Mechanical Inspection Section, P.O. Box 107020, Anchorage, Alaska 99510-7020, (907)269-4925.

32. CONTINUING OBLIGATION OF CONTRACTOR: Notwithstanding the expiration date of a contract resulting from this iRFQ, the contractor is obligated to fulfill its responsibilities until warranty, guarantee, maintenance and parts availability requirements have completely expired.

33. ORDER DOCUMENTS: Except as specifically allowed under this iRFQ, an ordering agency will not sign any vendor contract. The State is not bound by a vendor contract signed by a person who is not specifically authorized to sign for the State under this iRFQ. The State of Alaska Purchase Order, Contract Award and Delivery Order are the only order documents that may be used to place orders against the contract(s) resulting from this iRFQ.

34. BILLING INSTRUCTIONS: Invoices must be billed to the ordering agency's address shown on the individual Purchase Order, Contract Award or Delivery Order. The ordering agency will make payment after it receives the merchandise or service and the invoice. Questions concerning payment must be addressed to the ordering agency.

35. OFFERORS WITH DISABILITIES: The State of Alaska complies with Title II of the Americans with Disabilities Act of 1990. Individuals with disabilities who may need auxiliary aids, services, and/or special modifications to participate in this procurement should contact the procurement officer named on the cover page of this iRFQ as soon as possible, but no later than the date and time quotations are due to make any necessary arrangements.

36. COMPLIANCE WITH ADA: By signature of their quote the bidder certifies that they comply with the Americans with Disabilities Act of 1990 and the regulations issued thereunder by the federal government. Services or activities furnished to the general public on behalf of the State must be fully accessible. This is intended to ensure that agencies are in accordance with 28 CFR Part 35 Section 35.130 and that services, programs or activities furnished to the public through a contract do not subject qualified individuals with a disability to discrimination based on the disability.

Scope of Work

The Alaska Energy Authority (AEA) is looking to provide Itinerant Electric Utility Management and Clerk training/technical assistance for specific Rural Alaska Electric Utilities. There have been fifty-four communities identified as eligible under this specific funding to receive this training/technical assistance. The Technical Assistance and training, provided by the contractor, is intended to assist the utility staff to become experienced with the best practices for managing their Electric utility and maximizing the PCE subsidy for the benefit of their customers. The Contractor will provide classroom instruction in Seward, Alaska at the AVTEC facility.

Scope:

Training and Technical Assistance

The contractor will be required to provide the following services:

- a) Two each three day training sessions consisting of three each eight hour days, (Tue-Thur 8am-5pm) in person training. Schedule to be negotiated with contractor. Preference is one training Spring of 25' and one Fall of 25'. Class size will be capped at 10 students.
- b) A maximum of ten (10) hours per week, of support services, for the thirty (30) days following the in person training. The support services should occur during standard business hours (Monday through Friday 8:00 AM – 5:00 PM Alaska Standard Time). The days of the week and actual times for support services are negotiable with State of Alaska and Federal holidays excluded.
- c) A telephone line with message service (voice mail etc.).
- d) Response time to a messages may not exceed twenty-four (24) hours (DCCED reserves the right to cancel the Contract if the contractor does not meet the required response time.).
- e) The ability to assist using video conferencing.
- f) The Utility Management and Clerk Training shall consist of the following:
 - a. Tracking of departments and grants;
 - b. Writing checks for customer change (in cases were the utility does not have enough cash on hand);
 - c. Inventory control and inventory adjustments;
 - d. General ledger reconciliation;
 - e. Safeguarding data;
 - f. Monthly and quarterly reporting;
 - g. Financial reports;
 - h. Exporting to Excel to produce financial reports accepted by RUBA;
 - i. Budget
 - j. PCE and UMR Reporting
 - k. Line loss and line loss identification
 - l. Suggestions of meter types which may assist the Utility with revenue loss/generation
 - m. Ledger and spreadsheets for Utility reporting, line loss and fuel efficiency,

- n. Reporting per RCA
- o. Meter Reading, calculations and monthly power consumption reporting/billing.
- p. QuickBooks

Deliverables:

The contractor will be required to provide the following deliverables:

- a. Contractor to provide “thumb drive” to each student, prior to the course, for students to download existing QuickBooks and logs to use during the training.

Training/Technical Assistance:

- a) The contractor shall produce a detailed trip report within 14 days after each training session which must include:
 - 1. Daily student attendance for each session:
 - 2. Summary of information taught and assistance provided:
 - 3. Recommendations.
- b) Travel to Seward, Alaska to provide the required (2) classroom training sessions.
- c) Contractor shall be responsible for:
 - b. Every aspect of class content development
 - c. All student and instructor materials
 - d. Presentations
 - e. Online presentations, etc.
 - f. Training materials provided for each attendee shall include a workbook for each attendee that adopts governmental accounting practices, best practices for Power Cost Equalization management and provides examples based on the standardized chart of accounts provided by the RCA for PCE Annual Reporting. Students should see examples of Profit and Loss Statements, Accounts Receivable Aging, Income Statements, and Balance sheets appropriate for a rural utility receiving PCE
 - g. The workbook must be customized as stated above, but may reference standard sections of a QuickBooks commercial publication
 - h. Training materials will follow best practices in adult education, providing instruction for diverse learning styles. Each concept should be introduced; demonstrated successfully, visual examples provided i.e. screenshots. Bullet points on Digital Presentation slides will not be acceptable
 - i. Travel, lodging, food, labor, etc.
- d) Training shall be customized to:
 - 1. Address the unique requirements, problems, and experiences of electric utilities common to a particular region or all of Alaska.
 - 2. Incorporate the customized Chart of Accounts developed by the Regulatory Commission of Alaska and AEA for utilities.
 - 3. Include governmental accounting principles;
 - 4. Focus on an introduction to QuickBooks Pro or like accounting assistance software for participants who have little or no experience in working with a computerized accounting system. Proposers may assume that participants have a working knowledge of using computers and basic accounting knowledge, but little or no knowledge of QuickBooks or any accounting assistance software.
 - 5. Allow sufficient time for participants to ask questions, discuss common issues and problems, and network among themselves.

- e) Required services:
 - 1. Meet with AEA staff to review contract terms
 - 2. Meet with AEA Project Manager and AEA PCE Manager to collaborate on the curriculum for the training.
 - 3. The contractor shall produce a detailed trip report within 14 days after each training
- f) AEA responsibilities:
 - 1. Provide contact person to answer questions and/or provide guidance
 - 2. Provide a classroom facility in Seward, Alaska.
 - 3. Provide trainees for each training session. Sessions will be capped at 10 students.
- g) Student responsibilities
 - 1. Bring laptop to be used during the training sessions

Schedule:

Solicit Contract:	December 2024
Award Contract:	January 2025
Contact Communities:	January-March 2025
Provide Training/Technical Assistance:	April 2025-November 2025
Project Close Out:	December 2025

Budget:

Not to exceed \$50,000.

Pre-Bid Meeting:

Not Required

Cost Proposal:

Two training sessions in Seward, Alaska:

Prior Experience:

In order for offers to be considered responsive offerors must meet these minimum prior experience requirements:

Offers are to provide minimum prior experience under “Relevant Experience and Qualifications”.

- Three (3) years’ experience working with small governments or utilities (serving populations under 1500) in Alaska and;
- Two (2) years’ experience providing accounting technical assistance training, assistance, and implementation of governmental accounting processes.

An offeror's failure to meet these minimum prior experience requirements will cause their quote to be considered non-responsive and their quote will be rejected.

Subcontractors:

Subcontractors must meet the experience as mentioned under “Prior Experience”.

Joint Ventures:

Joint Ventures will be allowed. Both parties must meet the experience as mentioned under “Prior Experience”.