



## SELECTION PROCEDURE

1. Competitive Sealed Proposals will be evaluated by a committee (3 AAC 100.370). Evaluation of responses to criteria set forth in Part C results in a numerical score for each proposal. Each criteria in Part C has an assigned weight for this RFP which demonstrates its relative importance. The total of all weights is 100 (100%). Each one-percent weight equates to a potential range of 0-5 points per Evaluator. The maximum points (score) obtainable for any proposal is equal to the product of 500 multiplied by the number of Evaluators.
2. Scoring of proposals will be accomplished as follows:
  - 2.1 Each Evaluator will individually read and rate each Offeror's response to each criteria described in Part C - Section I - Technical Proposal. Ratings will be based solely on contents of proposal and in compliance with the Authority's standard Instructions for Evaluation Committee. Except as may be stated within any criteria description in Part C, a rating of "5" = Best Response from all Offerors; "4" to "1" = Progressively Less Responsive; "0" = Non-Responsive. Ratings are multiplied by the assigned weights for each criteria to obtain criteria scores.
  - 2.2 If only 1-3 proposals are received the rating scale may be adjusted. A rating of "5" = Best Response from all Offerors "4" to "3" = progressively less responsive; "0" = Non-Responsive. (1-2 will not be used)
  - 2.3 After completion of individual ratings in Part C, Section 1, Technical Proposal, the Evaluation Committee will meet to discuss proposals. Evaluators may then alter their ratings; however, any changes shall be based solely on the criteria set forth in Part C.
  - 2.4 After scoring Part C - Section I - Technical Proposal, criteria scores for Part C -and Section II - Price (if applicable) and bidder preference will be calculated based on criteria descriptions.
  - 2.5 The total score for each Offeror will be obtained by summing the scores determined for each criteria in Sections I, II and III of Part C. The order of ranking for negotiations shall be as follows: highest scored Offeror will be ranked first, next highest scored second, and etcetera.
3. Evaluators may discuss factual knowledge of, and may investigate Offerors' and proposed Subcontractors' prior work experience and performance, including but not limited to, projects referenced in proposal, available written evaluations, and may contact listed references or other persons knowledgeable of a Contractor's and/or a Subcontractor's past performance. Factors such as, but not limited to, overall experience relative to the proposed contract, quality of work, control of cost, and ability to meet schedules may be addressed. If any issues of significant concern to the proposed contract are discovered, the Committee may:
  - 3.1 Provide written recommendations for consideration during contract negotiations;
  - 3.2 Conduct discussions after the Evaluation Committee, in accordance with paragraph 4, below.
4. The Committee may decide to conduct discussions (or "interviews") with responsible Offerors whose proposals are determined to be reasonably susceptible of being selected for award for the purpose of clarification to assure full understanding of, and responsiveness to, the solicitation requirements (3 AAC 100.400). Offerors selected by the Committee for discussions may be permitted to submit Best and Final Offers (BAFO) for final Committee Evaluation. After discussions and any BAFO's, Evaluators will determine the final scoring and ranking for contract negotiations by evaluating written and oral responses using only the criteria set forth in Part C of this RFP (3 AAC 100.400).
5. If contract negotiations are unsuccessful with Offeror(s) selected for negotiation, the Contracting Agency may either cancel the solicitation or negotiate with other Offerors in the order of ranking.

## NOTICES

PART



1. The Contracting Agency is an equal opportunity employer.
2. A copy of the **Contract General Conditions and sample contract** are provided as a separate document.
3. Offerors are specifically advised that a contract shall not be in effect until a written agreement is executed by an authorized agent of the Authority. The Authority shall not be liable for any cost incurred by an Offeror in response to this solicitation, including any work done, even in good faith, prior to execution of a contract and issuance of a Notice to Proceed.
4. The Authority expressly reserves the right to waive minor informalities, negotiate changes or reject any and all proposals and to not award the proposed contract, if in its best interest. "Minor Informalities" means matters of form rather than substance which are evident from the submittal, or are insignificant matters that have a negligible effect on price, quantity, quality, delivery, or contractual conditions and can be waived or corrected without prejudice to other Offerors.
5. All proposals shall be open for public inspection per (AS 36.30.230) after a Notice of Intent to Award is issued. Offerors should not include proprietary information in proposals if such information should not be disclosed to the public. Any language within a submittal purporting to render all or portions of a proposal confidential will be disregarded. Proprietary information which may be provided after selection for contract negotiations will be confidential if expressly agreed to by the Authority and Executive Director.
6. Substitution for any personnel named in a proposal may result in termination of negotiations and the contract.
7. If it is discovered that a selected Offeror is in arrears on taxes due the State of Alaska, a contract may not be awarded until the Alaska Department of Revenue approves the payment provisions for the contract.
8. Offerors and proposed subcontractors shall be in compliance with the statutory requirements for Alaska business licensing and professional registrations included in the certification statement on Page 2 of Part D in this RFP package.
9. **PRICE COMPETITION:** Price will be an Evaluation Criteria in accordance provisions of AS 36.30.250. For services where applicable required to be performed only by Architects, Engineers or Land Surveyors (A/E or LS) licensed in the State of Alaska, UNLESS the provisions of AS 36.30.270(d) apply; i.e., unless the services required are repetitious in nature, and the nature and amount of services required are thoroughly defined by measurable and objective standards to reasonably enable firms or persons making proposals to compete with a clear understanding and interpretation of the services required.
10. Standard insurance provisions for Worker's Compensation, General and Automobile Liability, and Professional Liability are contained in Appendix D, Indemnification and Insurance. Coverages may be modified under very limited circumstances. Offeror should not assume any modification of coverages.

11. Professional Liability Insurance for the proposed contract:  is not required

is required as shown on Appendix D, Indemnification and Insurance.

12. Pre-proposal Conference:  None  As follows:

13. Special Notices:

13.1 **Alaska Business License** (Form 08-070 issued under AS 43.70) at the time contract is awarded as required by AS 36.30.210(e) for Contractor and all Subcontractors. In accordance with Administrative Manual, Section 81.120, proof of application for an Alaska Business license will satisfy this requirement. Per AAM 81.120, acceptable evidence that the offeror possesses a valid Alaska business license consists of any one of the following:

- a. Copy of the Alaska business license.
- b. A canceled check that demonstrates payment for the Alaska business license fee.
- c. A copy of the Alaska business license application with a receipt stamp from the State's business license office.
- d. A sworn notarized affidavit that the bidder/offeror applied and paid for the Alaska business license.
- e. Other forms of evidence acceptable to the Department of Law.

14. It is anticipated that the Agency will award a one (1) year contract with four (4) one (1) year extensions term agreements for these services. Tasks 1-3 are specific to a contractor interested in the scope as it relates to the AKEVWG facilitation, public outreach, and education. The Authority reserves the right to select contractors based on the strengths demonstrated to complete the tasks in one or both of these two areas.

## SUBMITTAL CHECKLIST

Offeror may use left margin to check off items when completed.

- [ ] 1. Offerors must carefully review this RFP Package for defects and questionable material and become familiar with submittal requirements. Submit written comments to the address shown under "Submittal Deadline and Location" on page 1 of Part A - RFP. Substantive issues will be addressed in a written addendum to all RFP recipients on record. Failure to comply with directions may result in lower score and may eliminate an Offer from consideration. Protests based on alleged improprieties or ambiguities in a solicitation may be disallowed at the discretion of the Authority if the protest is not received in writing at least ten Authority work days prior to the Offer deadline (AS 36.30.565).
- [ ] 2. Review Part A - RFP and the proposed Statement of Work and any other attached or referenced materials. If no Statement of Work is attached, telephone the Authority contact person identified on page 1 of Part A.
- [ ] 3. Review Part C - Evaluation Criteria. Read each criterion in light of the proposed Statement of Work. Note any project specific criteria which may have been added or any changes to standard criteria descriptions which may have been made. Be aware of the assigned weight for each criterion. If a weight is not entered for any criterion on Part C, notify the Agency contact person. Plan your proposal to address the applicable criteria. Criteria Responses shall not exceed the number of pages stated below.
- [ ] 4. Prepare a distinct Response for each criterion that has a weight more than zero. Failure to respond directly to any criteria weighted more than zero will result in an evaluation score of zero for that criteria. Any Responses to criteria weighted zero will be disregarded. Acceptable Responses must be specific and directly related to the Contracting Agency's proposed Statement of Work. Marketing brochures, marketing resumes, and other non-project specific materials will be discarded without evaluation and should not be submitted.
- [ ] 5. *Each criterion Response must be titled, numbered and assembled in the order in which the criteria are listed in Part C*, so the criterion to which information applies shall be plainly evident. Material not so identified or assembled may be discarded without evaluation.
- [ ] 6. Price  is  is not an evaluation criterion for the proposed contract.
- [ ] 7. Complete all entries on Part D - Proposal Form. Note the statutory requirements for Alaska business licenses and professional registrations and be sure to sign and date the Certification. Copies of licenses and registrations may be provided with Offer, and will not count in the requirements of #8 below.
- [ ] 8. Attach Criteria Responses (*except any Billing Rates or Price Proposals*) to Part D - Proposal Form. The maximum number of attached pages (*each printed side equals one page*) for Criteria Responses shall not exceed: **Ten (10)**. Attached page limit does not include the four-page Part D - Proposal Form.
- Criteria Responses shall be presented in **8-1/2" X 11" format**, except for a minimal number of larger sheets (e.g., 11" x 17") that may be used (e.g., for schedules) if they are folded to 8-1/2" X 11" size. Large sheets will count as multiple pages at 93.5 square inches or fraction thereof per page, unless otherwise noted.
- CAUTION: Criteria Responses which do not comply with the required page limit or presentation size, may result in disqualification. Further, small print or typeface that is difficult to read may negatively influence evaluation of your submittal and affect scoring for "Quality of Proposal."

CHECKLIST IS CONTINUED NEXT PAGE

## Submittal Items

- [ ] 9. None.
- [ ] 10. Parts A, B and C of the RFP and the proposed Statement of Services shall not be returned to the Contracting Agency. *Offers shall consist of the following applicable items assembled as follows and in the order listed:*
- [ ] 10.1 Completed Part D - Proposal Form (generally at least one copy with original signature) and Responses to all evaluation criteria -- *except Billing Rates, Price Proposals* -- attached. Each copy shall be fastened with one staple in the upper left corner. No other form of binding shall be used and no cover and no transmittal letter will be included. CAUTION: Failure to comply with this instruction will negatively influence evaluation of Submittal.
- [ ] 10.2 Number of copies of Part D (*all pages*) and Criteria Responses (*except Billing Rates / Price Proposals*) required is: **four (4) plus One (1) copy provided via electronic file on a flash drive** if mailed or hand delivered.
- [ ] 10.3 If *Billing Rates and/or Price Proposals* are required, *one copy* bound with one staple in the upper left corner separately enclosed in a sealed envelope marked on the outside to identify it as a *Billing Rates or Price Proposal* and the names of the Project and Offeror. Each *Billing Rates or Price Proposal* must be signed and dated by the person who prepares it (may be different signatures for each Subcontractor).
- [ ] 10.4 If Item 9, above, is completed for this RFP Package, any submittal items described therein. Unless otherwise stated, one copy only, bound appropriately.
- [ ] 10.5 CAUTION: If you replicate (other than by photocopy) Part D or any form in lieu of completing the forms provided by the Contracting Agency, provide a signed certification that lists such forms and attests that they are exact replicas of that issued by the Contracting Agency. Changed forms may be rejected at the Authority's discretion. Any alteration - other than completion of the required entries - may be cause for rejection without recourse.
- [ ] 11. Deliver *Offers in one sealed package* to the location and before the submittal deadline cited in Part A - RFP. *Mark the outside of the package* to identify the Project and the Offeror. Offers must be received prior to the specified date and time. Late Offers will not be opened (AS 36.30.160).

# EVALUATION CRITERIA

If a weight is not indicated for any criterion, telephone the Agency Contact person identified at the top of page 1 of Part A - RFP.

## SECTION I - TECHNICAL

### 1. Objectives and Services

1. Weight: 10

Response must **demonstrate your comprehension of the objectives and services** for the proposed contract. Do not merely duplicate the Statement of Services provided with this RFP. **Define any assumptions made** in formulating Criteria Response.

### 2. Methods

2. Weight: 10

Response must outline the methods or approach for accomplishing the proposed Statement of Services. Describe what, when, where, how, and in what sequence the work will be done to meet the schedule. Address how experience, and capabilities of your firms (Offeror and Proposed Subcontractors) and Project Staff might *specifically* contribute to the proposed methods and understanding of the stakeholders involved. Identify the amount and type of work to be performed by any Subcontractors. Consider how each task may be carried out; what services or interaction required from/with the Contracting Agency; etcetera. Suggest alternatives, if appropriate. Identify any **distinct and substantive qualifications** for undertaking the proposed contract such as the availability of specialized equipment or unique approaches or concepts **relevant to the required services** which the firms may use.

### 3. Management

3. Weight: 10

Response must describe the administrative and operational structures that will be used for performing the proposed contract. For example consider: who will have overall responsibility for the contract? Who will have direct responsibility for specific disciplines? What will the lines of authority be? A graphic depiction is preferred in your response to this criterion. Additionally, the Authority may want to inspect work products in progress and have a close ongoing working relationship with your Project Staff. Accordingly, your response should also identify where the various contract services will be performed, *in proximity to the Authority's office*, and how communications will be maintained between your Project Staff, the Authority, and any other government agencies or the public, as applicable.

### 4. Proposed Project Staff

4. Weight: 20

Response must name the individuals to perform the following **FUNCTIONS** plus any other professional/technical functions you deem essential to perform the services:

1. Contract Management (contract compliance)
2. Project Management (single point-of-contact directly engaged in contract performance)
3. Meeting Facilitation
4. EV-related Education

**Offerors which fail to provide a name for the individuals to perform the services below may be considered non-responsive and their proposal may be rejected:**

Continued on Next Page

Describe the work to be performed by the individuals you name to perform essential functions and detail their specific qualifications and substantive **experience directly related to the proposed contract**. Lists of projects are not useful. Focus on individual's specific duties and responsibilities and how project experience is relevant to the proposed contract.

For each person named, identify their: employer, professional discipline or job classification and state of residency. List at least 3 professional references (contact persons and telephone numbers) for each person.

#### 5. Workload and Resources

5. Weight: 5

Response must: (1) discuss both current and potential time commitments of your proposed Project Staff to all clients; (2) discuss the projected workload of each firm (Offeror and Proposed Subcontractors) for all clients; and (3) demonstrate adequate support personnel, facilities and other resources to provide the services required. Provide a list of current contracts with the Contracting Agency in which your proposed Project Staff are participating. Include all contracts statewide with the Authority.

#### 6. Past Performance

6. Weight: 25

Response must describe previous projects the project team has worked on that are related in size and scope to this project. Describe the dollar amount of the projects and a brief narrative of the successes of the projects. Address how the experience will help your team to perform under this contract. Provide references (contact name and phone number) for each project. Indicate which of the proposed firms and project staff was involved in each project. The State reserves the right to investigate referenced projects, contact references and research other projects that the respondent has worked on.

#### 7. Schedule Commitment

7. Weight: 5

Some of the services to be provided under this agreement are required to adhere to strict schedules. The firm selected for this agreement must be committed to providing completed deliverables as negotiated by individual NTP's.

Describe your commitment, should you be awarded this agreement, to provide the required deliverables in accordance with the schedules as negotiated by individual NTP's. Explain how you will assure that the submittals are acceptable to the Authority prior to their due dates.

### SECTION II - PRICE

**If price is not an Evaluation Criterion, weights for Criterion #6 shall be "0". If price is an Evaluation Criterion, the weight for Criterion #6 shall be at least "15", and all Offerors shall submit Price Proposals in the specified format(s).**

See item #9, under Notices in Part A - RFP, regarding statutory and regulatory provisions about price competition and item #10.3, in Part B - Submittal Checklist, regarding procedure for submittal of Billing Rates and/or Price Proposals. Cost terminology is explained on page 2 of the Pre-Audit Statement (DOT&PF Form 25A257).



CAUTION: Submittal of Offeror's or Subcontractor's "standard" rate schedules or other pricing documents which are not in required format will be non-responsive if they do not allow direct comparison with other responsive proposals.

Rates and costs proposed by the Offeror selected for contract negotiations may be investigated for reasonableness and allocability in accordance with AS 36.30.400, .420 & .480, 2 AAC 12.550 and the contract cost principles in 48 CFR Part 31. Unsupported rates and costs may be disallowed or result in termination of negotiations, or contract award. All proposed rates and the negotiated contract rates will be public information.

**6. Labor Billing Rates (Required Format)**

**6. Weight: 15**

Provide a proposed total hourly Billing Rate (i.e. inclusive of Direct Cost of Direct Labor, all Indirect Costs, and Fee) only for each of the job **FUNCTIONS** listed below. Note: Some of these functions may be performed by one or more employees of the Offeror or Subcontractors; consequently, an individual might be billed under the contract at different rates appropriate to the functions performed. **Only the maximum rate paid to any individual for each listed job function** - regardless of employer (Offeror or Subcontractor) - **must be provided and will be considered for this response**. Rates for lower paid individuals or for other job functions, if any, will be addressed during contract negotiations.

- |                         |  |
|-------------------------|--|
| 1. Contract Management  | (Estimated at 5% of total labor effort)  |
| 2. Project Management   | (Estimated at 10% of total labor effort) |
| 3. Meeting Facilitation | (Estimated at 45% of total labor effort) |
| 4. EV-related Education | (Estimated at 40% of total labor effort) |

\*In accordance with the submittal Checklist ('rfp-b'), item 10.3, *Billing Rates must be signed and dated by the person who prepares it (may be different signatures for each Subcontractor)*

Response will be scored as follows: The maximum hourly rates proposed for the job functions listed above will be multiplied by the percentage of total labor effort (estimated above) and then summed to obtain an aggregate rate for each Offeror. If more than one rate is provided for any job function, only the highest rate will be used. Each Offeror's score will be calculated using the following equation - except that the **score will be zero if a rate for each listed function is not provided by an Offeror**.

$$\frac{(\text{Lowest aggregate rate from all Offerors}) \times (\text{MPP}^*)}{(\text{Offeror's aggregate rate})} = \text{Offeror's Criterion Score}$$

\*MPP = Maximum Possible Points = (5) x (Number of Evaluators) x (Weight)

If no federal funding, then per AS 36.30.250(b), aggregate rates shall be reduced for the above calculation by the following applicable percentages when the rates are from Offerors that **designate preferences on page one of Part D**.

- ALASKA BIDDER (OFFEROR) PREFERENCE [2 AAC 12.260(d)].....5%
- ALASKA VETERAN-OWNED BUSINESS PREFERENCE [AS 36.30.175] (maximum \$5000) .....5%
- and only ONE of the following:
- EMPLOYMENT PROGRAM PREFERENCE [AS 36.30.170(c)] .....15%
- DISABLED SOLE PROPRIETOR OR 50% DISABLED EMPLOYEES [AS 36.30.170(e & f)] .....10%

To claim employment or disabled preference, Offeror must be on the appropriate Alaska Division of Vocational Rehabilitation list at the time designated for opening (i.e., receipt



## CERTIFICATION FOR ALASKA BUSINESS LICENSES AND REGISTRATIONS

PART

D

Contractor and all Subcontractors shall comply with the following applicable requirements of Alaska Statutes:

1. **Alaska Business License** (Form 08-070 issued under AS 43.70) at the time contract is awarded as required by AS 36.30.210(e) for Contractor and all Subcontractors. In accordance with Administrative Manual, Section 81.120, proof of application for an Alaska Business license will satisfy this requirement. Per AAM 81.120, acceptable evidence that the offeror possesses a valid Alaska business license consists of any one of the following:
  - a. Copy of the Alaska business license.
  - b. A canceled check that demonstrates payment for the Alaska business license fee.
  - c. A copy of the Alaska business license application with a receipt stamp from the State's business license office.
  - d. A sworn notarized affidavit that the bidder/offeror applied and paid for the Alaska business license.
  - e. Other forms of evidence acceptable to the Department of Law.
2. **Certificate of Registration** for each individual to be in "responsible charge" (AS 08.48.341(14)) for Architecture, Engineering or Land Surveying (Form 08-2407 issued under AS 08.48.211) issued prior to submittal of proposal. Associates, consultants, or specialists under the supervision of a registered individual in "responsible charge" are exempt from registration requirements (AS 08.48.331).
3. **Certificate of Authorization for Corporate Practice** for incorporated Contractors and incorporated Subcontractors for Architecture, Engineering or Land Surveying (Form 08-2407 issued under AS 08.48.241). Corporations offering to provide Architectural, Engineering or Land Surveying services do not need to be registered for such disciplines at the time proposal is submitted provided they obtain corporate registration before contract award (AS 08.48.241).
4. **Certificate of Incorporation** (Alaska firms) or **Certificate of Authorization for Foreign Firm** ("Out-of-State" firms). All corporations, regardless of type of services provided, must have one of the certificates (AS 10.06.218 and other sections of Title 10.06 - Alaska Corporations Code).
5. **Current Board of Director's Resolution** for incorporated Contractors and incorporated Subcontractors for Architecture, Engineering or Land Surveying (reference AS 08.48.241) which names the person(s) designated in "responsible charge" for each discipline. Such persons shall be licensed in Alaska and shall participate as project staff in the Contract/Subcontracts.
6. **All partners** in a Partnership to provide Architectural, Engineering, or Land Surveying **must be legally registered in Alaska** prior to submittal of proposal for at least one of those disciplines (AS 08.48.251) which the Partnership offers.
7. **Joint Ventures**, regardless of type of services provided, must be licensed/registered in the legal name of the Joint Venture as used in this proposal (AS 43.70.020 and 43.70.110(4)).
8. **Contracts for Architecture, Engineering or Land Surveying** may not be awarded to individuals, corporations or partnerships not in compliance, respectively, with the provisions of paragraph 2, 3, and 6, above (AS 36.90.100).

**[For information about licensing, Offerors may contact the Alaska Department of Commerce and Economic Development, Division of Occupational Licensing at P.O. Box 110806, Juneau, AK 99811-0806, or at Telephone (907) 465-2550, or at Internet address: <http://commerce.alaska.gov/dnn/cbpl/Home.aspx>]**

## CERTIFICATION FOR INSURANCE

Contractor will ensure that it and all Subcontractors have insurance coverage to effectuate the requirements APPENDIX D, Indemnification and Insurance. CONTRACTOR shall name Denali Commission as an additional insured on the Liability Insurance Policy.

**CERTIFICATION - COST AND PRICING DATA**

In accordance with 3 AAC 109.550, any cost and pricing data submitted herewith, or in any future price proposals for the proposed contract, will be accurate, complete and current as of the date submitted and will continue to be accurate and complete during the performance of the contract, if awarded.

**CERTIFICATION – TRADE RESTRICTIONS AND SUSPENSION AND DEBARMENT**

The individual signing this proposal certifies to the best of his or her knowledge that the Contractor and any subcontractors are in compliance with Appendix A, General Conditions, Article A25 and Article A26.

**CERTIFICATION - FOREIGN CONTRACTING**

By signature on this solicitation, the offeror certifies that all services provided under this contract by the contractor and all subcontractors shall be performed in the United States. If the offeror cannot certify that all work is being performed in the United States, the offeror must contact the Contracts Officer to request a waiver at least 10 days prior to proposal deadline. The offeror must provide with their submission a detailed description of the portion of work being performed outside the United States, where, by whom, and the reason the waiver is necessary. Failure to comply with this requirement may cause the state to reject the bid or proposal as non-responsive, or cancel the contract.

**CERTIFICATION – FORMER PUBLIC OFFICER**

Any proposer listing as a member of the proposer's team a current public officer or a former public officer who has left state service within the past two years must submit a sworn statement from that individual that the Alaska Executive Branch Ethics Act does not prohibit his or her participation in this project. If a proposer fails to submit a required statement, the proposal may be deemed nonresponsive or nonresponsible, and rejected, depending upon the materiality of the individual's proposed position.

The Ethics Act bars a public officer who leaves state service from representing, advising or assisting a person for compensation regarding a matter – that was under consideration by the administrative unit in which the officer served, and in which the officer participated personally and substantially through the exercise of official action, for two years after leaving state service. See AS 39.52.180(a). "Public officer" includes a state employee, a member of a state board and commission, and a trustee of the Exxon Valdez Oil Spill Trust. "Official action" means a recommendation, decision, approval, disapproval, vote, or other similar action or inaction. Possible remedies for violating the bar include penalties against the former public officer and voiding the state grant, contract or lease in which the former public officer is involved.

Additionally, former public officers may not disclose or use information acquired in the course of their official duties that could in any way result in a benefit to the former public officers or their families, if the information has not been disseminated to the public or is confidential by law, without appropriate authorization. See AS 39.52.140.

Each current or former public officer is responsible for determining whether he or she may serve in the listed capacity on this project without violating the Ethics Act. A form that a former public officer may use to certify their eligibility is attached. Current public officers may seek advice from their designated ethics supervisors concerning the scope and application of the Ethics Act. Former public officers may, in writing, request advice from the Office of the Attorney General, Ethics Attorney concerning the application of the Ethics Act to their participation in this project. It is the responsibility of the individual and the proposer to seek resolution in a timely manner of any question concerning the individual's eligibility.



# PROPOSED STATEMENT OF SERVICES

## APPENDIX B

Date Prepared: 2/23/2022

RFP No.: 22046

### RFP No. 22046

### AEA EV Program Support

#### BACKGROUND:

The Alaska Energy Authority (AEA or the Authority) was created by the Alaska Legislature in 1976. The Authority worked throughout the 1980s to develop the state's energy resources as a key element in diversifying Alaska's economy. Additional legislation in 1993 and 1999, programmatically expanded the Authority's role as the State's energy office. The primary mission of the Authority is to reduce the cost of Energy in Alaska.

On January 29, 2018, Alaska became a beneficiary of the VW Environmental Mitigation Trust (Trust) established through a court settlement to fund mitigation projects that reduce nitrogen oxide (NOx) emissions. The Authority was designated as the State's lead agency to manage and distribute the funds to complete eligible mitigation projects. The Authority segued into the electric vehicle (EV) realm through the State's allocation of \$1.25 million of Trust funds for the installation of EV charging infrastructure (EVSE). Thereafter, AEA adopted a secondary mission to reduce barriers to EV adoption.

To achieve its secondary mission, AEA has conducted public outreach and education and has worked towards reducing range anxiety by strategically installing EV chargers. In 2020, AEA facilitated the development of the Alaska Electric Vehicle Working Group (AKEVWG), composed of representatives of utilities, state and local government, researchers, EV owners, and stakeholder industries. The AKEVWG meets quarterly and holds technical meetings on all topics EV, including solutions to impediments to EV market adoption, utility demand fees and EV charging rate structures, and siting criteria for EV chargers. Past agendas, presentations, meeting notes or recordings, and quarterly newsletters developed by AEA can be found on AEA's website. Last year, AEA also hosted the first Electric Vehicle Car Show along with other partners and sponsored an EV Ride-and-Drive event.

The lack of EV charging infrastructure has been identified as a significant barrier to EV market adoption in Alaska. To address this, AEA has initiated a multi-pronged approach to establish a statewide, interconnected EV fast-charging network along the highways and ferry terminals and community-based Level 2 charger installations. In 2021, AEA utilized Trust funds and Department of Energy (DOE) State Energy Program (SEP) funds, along with private matching funds from site hosts, to install 15 fast chargers and eight Level 2 chargers at nine stations connecting Seward and Homer to Healy. The first station was commissioned in Homer in September 2021; the remaining sites are anticipated to be completed by summer 2022. Utilizing SEP funds, three Level 2 chargers were installed in downtown Anchorage at state- owned facilities, with additional sites planned in 2022.

The recently passed Infrastructure Investment and Jobs Act (IIJA) offers a once-in-a-lifetime funding opportunity to complete a statewide EV fast-charging network as well as community-based charging installations in both rural and urban areas throughout the state. Under the IIJA National Electric Vehicle Infrastructure (NEVI) Formula Program Alaska will receive more than

\$50 million over five years beginning in fiscal year 2022, which will be managed by the Authority, to strategically deploy publicly accessible EVSE along designated alternative fuel corridors of the National Highway System. To access these funds, the State must develop and submit an implementation plan describing how the funds will be disbursed each year to meet the program objectives. In February 2022, the Federal Highway Administration issued additional guidance on the NEVI Formula Program. The IIJA also appropriates \$2.5 billion for competitive grants under the Charging and Fueling Infrastructure Program for the installation of publicly accessible EVSE and several other IIJA programs provide funding for EVSE installations or transportation electrification.

In the coming year, the Authority will continue facilitating the quarterly and technical AKEVWG meetings, developing quarterly newsletters, and hosting public outreach and education events. The Authority will coordinate with other government agencies and conduct stakeholder outreach to develop a plan for the strategic deployment of publicly accessible EV chargers in both rural and urban areas throughout the state, which will be implemented in subsequent years. AEA also intends to develop partnerships and pursue funding opportunities to facilitate EV adoption throughout the state, including isolated rural areas that are not part of the National Highway System.

By way of this RFP, the Authority is soliciting proposals from consultants with knowledge in transportation electrification and planning who are qualified to: (a) facilitate the AKEVWG quarterly meetings and technical sessions; (b) develop quarterly newsletters; (c) support the Authority in conducting education and outreach activities related to the EV market; (d) support the Authority in preparing transportation electrification and EVSE grant applications.

This RFP is for a contract for these services. The duration may be up to five years with a maximum contract value of \$200,000 or \$40,000 annually. Notices to Proceed (NTP) for specific services will be issued to the selected term contractor(s) as need arises.

The successful Contractor(s) will have the following minimum qualifications:

- Knowledge and experience with the EV market in Alaska, transportation electrification, barriers to EV adoption, and utility rate structures.
- Knowledge and experience in regional, urban or rural planning related to EV charging infrastructure, transportation, or energy.
- Knowledge and experience in facilitating groups similar to the AKEVWG (i.e. industry working groups and/or industry advisory groups), planning and facilitating meetings, workshops, conferences, and public outreach and education activities.
- Knowledge and experience in writing newsletters and website material.

## **SCOPE OF WORK**

The contract that will be awarded under this RFP is intended to assist the Authority in hosting the AKEVWG, conducting public outreach and education activities, pursuing funding sources for transportation electrification and infrastructure development, statewide EVSE planning, and reducing barriers to EV adoption.

The scope of work items are identified below. The actual scope of work and requirements for each task order will be identified in the request for proposals (RFP) issued to the selected term Contractor. All task orders will include a Project Management component. The Contractor shall invoice monthly and submit brief monthly progress reports (1-2 pages) that include a description

of the activities and/or deliverables completed that period, budget status, and planned activities for the next quarter.

## **Task 1: Alaska Electric Vehicle Working Group Facilitation**

The Authority hosts the AKEVWG, which is comprised of members from across the state including the Alaska Department of Transportation & Public Facilities, local municipalities, electric utilities, universities, researchers, the Alaska Electric Vehicle Association, EV owners, EV and EVSE vendors, prospective and current charging site hosts, and other stakeholders. The AKEVWG charter can be found on AEA's website.

Respondents to this RFP need to demonstrate experience in facilitating groups similar to the AKEVWG (i.e. industry working groups and/or industry advisory groups) and have a proven track record of planning and facilitating meetings, workshops, conferences, and public outreach and education activities.

### **Task 1.1: AKEVWG Quarterly Meetings**

The Contractor shall facilitate the AKEVWG quarterly meetings throughout the year. The Contractor shall coordinate with AEA and the AKEVWG to identify meeting topics and prepare meeting agendas; secure speakers and presentations as appropriate; host and facilitate each meeting through Microsoft Teams or similar platform; record meetings; and prepare meeting summaries. Meetings shall be held virtually during the COVID-19 pandemic until it is deemed that in-person meetings can safely occur. In-person meetings shall be held at AEA's Anchorage office, or another Anchorage-based venue to be determined by AEA. All in-person meetings will also allow for remote attendance. All meetings are open to the public.

Quarterly meetings are typically one to two hours long. The Contractor will work with the Authority to preschedule quarterly meetings for the calendar year and shall provide draft meeting materials and presentations to AEA no later than two weeks prior to meeting dates. AEA will distribute and post meeting materials one week prior to meetings. The Contractor shall provide meeting recordings and meeting summaries within one week after meetings.

### **Task 1.2: AKEVWG Technical Meetings**

The Contractor shall facilitate a minimum of six and up to ten AKEVWG technical meetings throughout the year. Technical meetings pertain to specific informational needs identified by AEA or other AKEVWG stakeholders and can be in the format of information sharing or work sessions. Technical meetings are smaller in nature and are often targeted towards a specific stakeholder group. The Contractor shall coordinate with AEA and the AKEVWG to identify specific technical meeting topics and invite specific stakeholders pertinent to the meeting topic. The Contractor shall prepare meeting agendas; secure relevant experienced speakers and presentations as appropriate; host and facilitate each meeting through Microsoft Teams or similar platform; record meetings; and prepare meeting summaries. Meetings shall be held virtually during the COVID-19 pandemic until it is deemed that in-person meetings can safely occur. In-person meetings shall be held at AEA's Anchorage office, or another Anchorage-based venue to be determined by AEA. All in-person meetings will also allow for remote attendance. All meetings are open to the public.

AEA anticipates technical meetings to span one to two hours depending on the topic. The Contractor shall provide draft meeting materials and presentations to AEA no later than two weeks prior to meeting dates. AEA will distribute and post meeting materials one week prior to meetings. The Contractor shall provide meeting recordings and meeting summaries within one week after meetings.



## **Task 2: Public Outreach and Education**

The Contractor shall facilitate outreach to, and education of, the EV industry in general and the Alaska EV industry specifically. This work shall include collaboration with industry stakeholders to facilitate events in technical and non-technical forums and the production of materials and publications to educate, and to share, information about Alaska EV adoption.

The Contractor shall produce content for a quarterly newsletter highlighting the activities of the AKEVWG and include other pertinent information, as appropriate, that may be useful to the Alaska EV stakeholders (e.g., EVSE development, regulatory proceedings, publications or presentations by national research institutions or relevant events/workshops/conferences, upcoming events, funding opportunities). Newsletters will be published on AEA's website and dispensed via the AKEVWG listserv.

The Contractor shall coordinate with AEA on topics to be included in the newsletter. The Contractor shall provide draft content to AEA and work with AEA staff on layout. Newsletters are typically two pages; see AEA's website for examples of past newsletters.

## **Task 3: Funding Research and Acquisition**

There are \$2.5 billion appropriated for competitive grants under the IIJA Charging and Fueling Infrastructure Program for the installation of publicly accessible EVSE as well as other programs that provide funding for EVSE or transportation electrification. The Contractor shall work with the AEA Program Manager to establish partnerships, identify eligible projects, and prepare grant applications. The Contractor shall also research other funding opportunities for EV related activities. This work may include literature searches, development of partnerships and conceptual projects, and grant and/or other application preparation. The activities for which funding is intended to be sought include, but are not limited to the quarterly AKEVWG meetings; regional meetings; public outreach and education; transportation electrification; EVSE procurement and installations; data collection, analysis and reporting; and planning.

This document does not and is not intended to include or address every item that will be included or addressed in the contract for professional services.

The base period of this contract shall be from date of AWARD to April 7, 2023, with (4) subsequent annual option years. The duration may be up to five years with a maximum contract value of \$200,000.

### **ADMINISTRATIVE REQUIREMENTS**

The Contractor shall not perform services or incur billable expense except as authorized by issued Notice to Proceed (NTP).

The Contractor shall be responsible for all tasks and services authorized by the Notice to Proceed (NTP) signed by the designee established by the Authority, and shall provide such services in accordance with the project schedule.

Submittal Requirements. Deliverables shall be compatible with standard commercial software, and submitted in PDF.