Community Energy Programs

REQUEST FOR PROPOSALS
Issue Date: August 5, 2016

Response Due: August 31, 2016
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Community Energy Programs
Request for Proposals

PART I
GENERAL INFORMATION

I-A Purpose
The Michigan Energy Office (MEO) is offering grants to Michigan local governments, public K-12 school districts, 501(c)(3) organizations, and small businesses, for projects that will accelerate the transition to and use of energy efficiency and renewable energy (EE/RE) products and services in Michigan.

Projects must benefit local governments and/or public k-12 schools, and must fall under the following three Areas of Interest:
1. Community Energy Management (CEM) Implementation,
2. Benchmarking services, and/or
3. LED lighting retrofits.

See Section III-E for additional details on each Area of Interest.

These activities must result in cost-effective energy upgrades that reduce operating costs for public building owners, support community development and local job creation, and free up capital to reinvest in communities over the long term.

Note: Applicants could potentially receive awards in all three Areas of Interest. However, a separate application is required for each Area of Interest. Please clearly state in the Project Title of your proposal which Area of Interest you are responding to.

I-B Grant Award
A total of $400,000 in funding is expected to be available. MEO anticipates making awards that range from $25,000 to $150,000; however, MEO reserves the right to increase or decrease the final approved budget and/or scope to achieve projects that best meet the needs of MEO and the Michigan Agency for Energy (MAE). Applicant(s) must provide a complete Budget using the Approved Budget Form (See Section IV-B).

Budgets must be itemized and be accompanied by a budget narrative which adequately describes each budget category.

All applicants must provide a minimum 200 percent (200%) match of the total requested grant funds (a.k.a “State share”). Match may be contributed by the direct applicant and/or partnering organizations/schools/communities, and may consist of cash, in-kind contributions, EE/RE implementation projects to be completed during the project period, and/or other non-federal sources of funding, and pledged amounts must be documented via letters of support/commitment included with the proposal. The sum of the State share plus the Recipient share of allowable costs will equal the total...
allowable project cost (see Sec. IV-B).

The Michigan Energy Office (MEO) will award funds to applicants that agree to the terms set forth in this RFP and the **Grant Agreement**. The MEO, on behalf of the Michigan Agency for Energy (MAE) and the Department of Licensing and Regulatory Affairs (LARA), may negotiate the scope of work, budget, reporting periods, report format, and reporting content. All other requirements are non-negotiable. Funds must be expended by August 31, 2017.

I-C **Eligibility Requirements**
Any Michigan local government or K-12 public school district, as well as any 501(c)(3) or small business (<500 employees) organization with demonstrated experience working with local governments and/or other public building owners on efficiency and/or renewable energy projects, physically located in Michigan, is eligible to apply. Please note that communities described in Section III-F, Program Priorities, will receive priority consideration for participation under this grant. (See Sections III-G, III-H, and the Grant Agreement for additional requirements).

I-D **Issuing Office and Point of Contact**
This Request for Proposals (RFP) has been issued by the MEO. Questions that arise as a result of this RFP must be submitted to the MEO by email only. Telephonic questions cannot be answered. All questions must be submitted on or before 5:00 PM, August 12, 2016. All questions regarding this solicitation should be directed to:

Tania Howard
Howardt6@michigan.gov

I-E **Changes to the RFP and Responses to Questions**
Written answers to questions, changes, and/or clarifications will be posted at: www.michigan.gov/energy by August 17, 2016.

I-F **Pre-proposal Conference**
No pre-proposal conference will be held for this RFP. Any inquiries should be submitted as outlined in Section I-D.

I-G **Proposals**
To be considered, applicants must submit a complete response to this RFP, addressing the Work Statement provided in Part III and using the format and attachments provided in Part IV. **An original signature copy and one electronic copy of each proposal must be submitted to the Issuing Office.** A PDF document of the signed proposal must be submitted to the RFP Issuer. An electronic copy may be emailed to the RFP Issuer or submitted as a PDF document saved to a USB drive. Proposal must be original and cannot be funded in part or whole by another entity without the MEO’s consent. An official who is authorized to bind the applicant to its provisions (an “Authorized Negotiator”) must sign the proposal. For this RFP, the proposal must remain valid for at least sixty (60) calendar days.
Proposals must arrive at the Issuing Office by 12:00 PM (noon) on August 31, 2016. Mail or hand deliver hard copy proposals to Tania Howard at:

Mailing address:
Tania Howard
Michigan Energy Office
Michigan Agency for Energy
P.O. Box 30221
Lansing, MI 48909

or

Street address (for hand deliveries only):
Tania Howard
Michigan Energy Office
Michigan Agency for Energy
7109 W. Saginaw Highway
Lansing, MI 48917

Applicants mailing proposals should allow normal delivery time to ensure timely receipt of their proposal. Electronic copy proposals may be emailed to Tania Howard at howardt6@michigan.gov. Proposals must be submitted as complete documents. Additional information pertaining to the proposal received after the due date and time will not be accepted.

I-I Oral Presentation
Applicants may be required to make an oral presentation of their proposal to the State. These presentations provide opportunity for the applicant to clarify the proposal to ensure thorough mutual understanding. The Issuing Office will schedule these presentations as necessary.

I-J Project Clarifications/Revisions
During the proposal review process, applicants may be contacted for clarification and for the purpose of negotiating changes in project activities, timetables, and budgeted costs. The Issuing Office reserves the right to award funds for an amount other than that requested and/or request changes to, or clarification of, the proposed project.

I-K Rejection of Proposals
The MEO reserves the right to reject any and all proposals received as a result of this RFP, or to negotiate separately with any source whatsoever in any manner necessary to serve the best interest of the State and MEO. The MEO will not award a grant solely on the basis of any response made to this request or otherwise pay for the information solicited or obtained.

I-L Acceptance of Proposal Content
The contents of this RFP and the proposal of the selected applicant become grant
obligations if a grant award ensues. Failure of the selected applicant to accept these obligations shall result in cancellation of the award.

The successful applicant(s) will be required to accept all terms and enter into a Grant Agreement with the State within 45 calendar days of being notified of funding availability. The Agreement consists of standard contract language, applicant’s work plan, timetable, and budget information, a compensation clause that adheres to guidelines in this solicitation, and terms and conditions that outline additional requirements.

I-M Incurring Costs
The State and the MEO is not liable for any costs incurred by an applicant prior to issuance of a grant agreement.

I-N Economy of Preparation
Proposals should be prepared simply and economically, providing a straight-forward, concise description of the applicant’s ability to meet the requirements of the RFP. Professional bindings, colored displays, promotional materials, and so forth, are not desired. Emphasis should be on completeness and clarity of content.

I-O News Releases
News releases (including promotional literature and commercial advertisements) pertaining to the Grant or project to which it relates must not be made without prior written State approval, and then only in accordance with the explicit written instructions of the State.

I-P Disclosure of Proposal Contents
All information in a bidder’s proposal and any Grant resulting from this RFP is subject to the provisions of the Freedom of Information Act, 1976 Public Act No. 442, as amended, MCL 15.231, et seq.

I-Q Davis-Bacon Act Requirements
The Davis-Bacon Act requires that all laborers and mechanics that are non-government employees receive prevailing wages. This requires that the Department of Labor (DOL) wage rate report is included with agreements that are affected by the Davis-Bacon Act requirement. If applicable, all positions that are related to an agreement subject to the Davis-Bacon Act must be classified accordingly. Weekly time reporting requirements and necessary forms are listed in the Grant Agreement, Addendum to Part II. Detailed information about the Davis Bacon Act can be found here: http://www.dol.gov/compliance/guide/dbra.htm

I-R Copyrighted Materials
See Section 3.11 of the Grant Agreement for a summary of intellectual property provisions.

I-S Prime Applicant Responsibilities
The selected applicant will be required to assume responsibility for all grant activities offered in the proposal whether or not that applicant performs them. Further, the State and
MEO will consider the selected applicant (Recipient) to be the sole point of contact with regard to grant matters, including but not limited to payment of any and all costs resulting from the anticipated grant. If any part of the work is to be subcontracted, the Recipient must notify the MEO and identify the subcontractor(s), including firm name and address, contact person, complete description of work to be subcontracted, descriptive information concerning subcontractor’s organizational abilities, Federal Employer Identification Number (FEIN), DUNS number, and/or state license number. The State and MEO reserves the right to approve subcontractors for the project and to require the Recipient to replace subcontractors found to be unacceptable. The Recipient is totally responsible for adherence by the subcontractor to all provisions of the Grant. For additional information, see Section 2.2 of the Grant Agreement for a summary of delegation provisions.

I-T Partner Responsibilities
Organizations partnering with selected applicant(s) must comply with the requirements of the solicitation and will be held to the same standards as prime applicants (See Section I-S).
PART II
SELECTION CRITERIA

All proposals received shall be subject to an evaluation by the MEO. The evaluation will be conducted in a manner appropriate to select the applicant(s) for the purpose of entering into a Grant Agreement to perform the proposed project within the established timeline. Initial screening of the applications will be conducted to ensure applicants and projects meet all eligibility requirements.

Proposals failing to meet the eligibility requirements described in Sections I-C, III-G, and III-H, that do not comply with the requirements of the Grant Agreement, and/or which are incomplete, will be rejected automatically. Proposals meeting the eligibility requirements will be evaluated according to the scoring criteria and weighting factors below. Applicants may be asked to make oral presentations before a final decision is made.

Applications will be evaluated against the criteria below. **Total maximum points is 100.**

1. **Proposal Quality and Completeness of Work Plan, Timeline, and Budget** (20 Points)
   Proposals will be evaluated based on the level of detail and overall quality of information contained within the proposal documents – particularly the Work Plan, Timeline, and Budget – including clear identification of tasks outlined in Section III-D, Tasks.

2. **Experience of Organization/Project Team** (20 Points)
   Proposals will be evaluated on the experience and qualifications of the organization and project team in carrying out related projects. Success of the applicant and project partners in completing other recent MEO projects, if applicable, will also be considered.

3. **Project Feasibility** (25 Points)
   Projects will be evaluated on their likelihood of success and feasibility to achieve the purpose, outcomes, and tasks required by this RFP within the established timeframe.

4. **Program Priorities** (10 Points)
   Projects incorporating the program priorities of the Michigan Energy Office, CEM & Public Buildings program (see Part III, Section III-F).

5. **Project Impact** (25 Points)
   Anticipated short and long-term impacts will be evaluated.

   a. **Area of Interest 1 – CEM Project**
      Proposals will be evaluated based on: demonstrated commitment and involvement of participating communities, progress to date in pursuing CEM Best Practices; type of activities to be pursued in the proposed project; square footage and number of buildings/facilities impacted; projected energy and/or dollar savings; number, type/variety, and geographic distribution of communities; leveraging of partnerships; action plan for program sustainability beyond the grant period; and any additional social and/or environmental benefits.
b. **Area of Interest 2 - Benchmarking Public Buildings**

Proposals will be evaluated based on: total number and square footage of buildings to be benchmarked; cost of benchmarking ($/building), and commitment from building owner/operator to act on data and continue participation in Energy Star Portfolio Manager beyond the grant period.

c. **Area of Interest 3 - LED Lighting Conversion in Public Buildings**

Proposals will be evaluated based on: total number of LED lights to be installed; amount of energy saved (kWh/yr.) resulting from the lighting upgrade; and participation in Energy Star Portfolio Manager.
PART III

WORK STATEMENT

III-A Purpose
The Michigan Energy Office (MEO) is offering grants to Michigan local governments, public K-12 school districts, 501(c)(3) organizations, and small businesses, for projects that will accelerate the transition to and use of energy efficiency and renewable energy (EE/RE) products and services in Michigan.

Projects must benefit local governments and/or public k-12 schools, and must fall under the following three Areas of Interest:
1. Community Energy Management (CEM) Implementation,
2. Benchmarking services, and/or
3. LED lighting retrofits.

These activities must result in cost-effective energy upgrades that reduce operating costs for public building owners, support community development and local job creation, and free up capital to reinvest in communities over the long term.

Applicants are strongly advised to review Section III-E for additional details regarding the Areas of Interest before proceeding to the Tasks section.

Note: Applicants could potentially receive awards in all three Areas of Interest. However, a separate application is required for each Area of Interest. Please clearly state in the Project Title of your proposal which Area of Interest you are responding to.

The State reserves the right to award funds for an amount other than that requested and/or request changes to, or clarification of any and all proposals received as a result of this RFP.

III-B Problem Statement
Buildings use more than 40% of the total energy consumed in the United States, making them an essential target for energy savings. Meanwhile, local governments, K-12 schools, and other public entities are often in search of ways to make their dollars stretch farther in order to do more with less. It is with this in mind that we seek to improve the capacity of public building owners and operators to better understand their energy use, strategically plan for energy projects that fit in the context of, and help them achieve, their broader goals for the future, and facilitate the implementation of proven EE/RE technologies which can result in substantial annual energy and dollar savings.

III-C Objectives
The objectives of this RFP, and projects funded hereunder are to:

1. Improve energy efficiency and energy management of public buildings and facilities in Michigan.
III-D Tasks

Applicants must clearly and succinctly explain how they will accomplish each required task below, which must be completed during the grant period. Applicants are encouraged to design additional tasks that address the expressed needs of the program and the State, but also capitalize on the strengths of the applicant.

Community Energy Management Implementation

1. In the proposal – Identify and assemble a project team to implement the project. Identify the roles and responsibilities of all team members. Third-party consultants applying to serve as Community Energy Managers for communities **must obtain signed letters of commitment from participating communities (contingent upon award), including any match documentation**, if applicable.

2. In the proposal – Create a project plan outlining the general aspects of the project, including major tasks, decision points, and plans for project evaluation. Identify any contractual services that may be required for project completion, including a description of the manner in which Community Energy Managers will be provided (by in-house applicant staff, new position, subcontracted, etc.). Include a project timeline.

3. Manage project development and implementation, including completion of the following key subtasks:
   a. Serve as or Select and provide/identify training and oversight for Community Energy Managers.
   b. Provide opportunities for Community Energy Managers to share best practices with one another and with other local governments.
   c. For a detailed description of the CEM position scope, see the [CEM sample position description](#). Deliverables for the Community Energy Managers during the project include:
      i. Regular onsite meetings and relationship-building with key decision makers to understand the community’s energy needs and concerns.
      ii. Facilitate the adoption of energy plans, policies, and other [CEM Best Practices](#).
      iii. If not already completed, benchmark local government energy and sustainability actions and compare with like communities, including enrollment in the U.S. EPA’s ENERGY STAR Portfolio Manager. **It is expected that third-party service providers and participating communities will share the building and energy data of each community facility benchmarked to date or proposed under this grant with the State of Michigan master account or any other Portfolio Manager account designated by the MEO.**
      iv. If not already completed, develop or refine a prioritized Energy Action Plan to pursue targeted energy savings, water savings, cost savings, and greenhouse gas reductions that is specific to the local government’s needs. Include in the Energy Action Plan a strategy for CEM program sustainability beyond the grant period.
v. Utilize the energy action plan to identify and pursue priority funding opportunities that are specific to the local government’s needs, including engagement with utility provider(s).
vi. Identify in-kind support and evaluate long-term viability for the role of a local government staff person focused on energy efficiency, renewable energy, and other sustainability goals.

vii. **Oversee implementation of one or more project in each local government that improves building energy efficiency.**

4. Actively engage with and provide community feedback and regular project updates to the MEO over the course of the grant period
5. Provide project evaluation data to the MEO at the project mid-point and at the end of the grant period
6. Submit progress and financial status reports as outlined in the Grant Agreement
7. Submit a comprehensive final report and final payment request as outlined in the Grant Agreement.

**Benchmarking Public Buildings**

1. Obtain authorization from the organizations listed in the Buildings & Cost Summary Sheet (see link and instructions below) to release their utility use information, including but not limited to, ENERGY STAR score, utility cost per hour and energy use index (EUI) on the MEO website or any other webpage designated by the MEO.
2. Collect all necessary information for the buildings and create a U.S. EPA ENERGY STAR Portfolio Manager Account for each organization listed in the Buildings & Cost Summary Sheet.
3. Input each organization/building’s monthly energy and water consumption and cost data for the last twenty-four (24) months into Portfolio Manager.
4. Benchmark buildings using ENERGY STAR Portfolio Manager Tool.
5. Share the building and energy information of each organization with the State of Michigan master account or any other Portfolio Manager account designated by the Michigan Energy Office.
6. Submit progress and financial status reports as outlined in the Grant Agreement.
7. Submit a comprehensive final report and final payment request as outlined in the Grant Agreement.

**LED Lighting Conversion in Public Buildings**

1. Identify and assemble a project team to implement the project. Identify the roles and responsibilities of all team members.
2. Create a project plan outlining the general aspects of the project. Identify contractual services that may be required for project completion. Include a project timeline.
3. Implement and oversee the proposed project.
4. Complete quarterly project status reports, financial status reports, and a final project report.
5. Provide the Michigan Energy Office with project evaluation data 12 months after completion and grant close out.

III-E Areas of Interest

Area of Interest 1 – Community Energy Management Implementation

Under this Area of Interest, the funded projects will facilitate the implementation of a Community Energy Management program within Michigan local governments and build upon the progress achieved by communities in Phases I and II of the CEM program. Projects must focus on activities that will result in long-term success and program sustainability for participating communities, including financial, administrative, and institutional viability of CEM efforts beyond the grant period.

Third-party organizations applying to provide CEM services to local governments are expected to service multiple communities under their proposal, and are encouraged to form strategic partnerships that leverage organizational strengths, resources, and proximity to participating communities. Communities applying directly may take an individual or shared approach. It is expected that local governments served under this grant will vary by size, population, and geographic location in Michigan, and demonstrate a strong commitment to furthering their Community Energy Management efforts. In addition, communities described in Section III-F will receive priority consideration for assistance under this grant. MEO reserves the right to approve local governments recommended for Community Energy Management Implementation assistance. Local governments seeking assistance under this grant are strongly encouraged to take the Michigan Green Communities Challenge. CEM projects may take a variety of forms based on community needs, but generally fall into the categories below:

a) Third-party CEM Services – Businesses and 501(c)(3) organizations providing CEM Services to local governments:

  Third-party consulting organizations will work with participating local governments to prioritize and implement each community’s Energy Action Plan, and prepare local governments for program sustainability after the grant period.

Entities applying under this framework are expected to proactively engage communities and provide letters of intent / commitment from municipalities they intend to serve at the time of their proposal (subject to notification of a grant award under this program).

CEM service providers will coordinate with the MEO as appropriate to provide continuous targeted technical assistance to participating communities during the grant period, and will provide regular feedback on the program and Best Practices implementation to MEO. Feedback gained over the course of these projects may be used to refine the Best Practices as necessary.
b) **Local Government Direct Support** – Communities developing or expanding in-house expertise in energy topics, including but not limited to the following strategies:

a. **CEM Staff Position** – Partial funding for a new, or retention of an existing, CEM staff position. Assuming successful demonstration of the position and associated energy savings, the goal of this approach would be the creation or support of an ongoing, permanent position, to be funded by the community in subsequent years. Communities may also opt to share a Community Energy Manager with a neighboring community. A sample “shared CEM agreement” developed by Clean Energy Coalition under a FY 2015 MEO grant is available [here](#) for reference. **Municipalities must specify how many hours the Community Energy Manager will work each week, include a work plan delineating key community goals to be pursued during the grant period and approximate hours/time to be spent on each task, and solicit/support the position if awarded.**

b. **Staff Training** – To fill knowledge gaps and facilitate professional development of existing municipal staff in relevant positions through attendance at trainings/workshops/seminars relating to energy management topics. The goal of this strategy is to expand the scope of one or more existing staff positions to include Community Energy Management functions. This may be ideal for staff persons already serving in a sustainability and/or facilities management-related position. **Municipalities applying for funding under this strategy will be expected to identify relevant staff, current roles/responsibilities, and training needs, and to the extent possible, identify specific training sessions of interest that will increase staff proficiency in topics relevant to Community Energy Management.**

c. **Contractual Services** – Contracting with a qualified consultant to serve as a Community Energy Manager. This is similar to the Third-party CEM Services approach above, except in this case the municipality (or group of municipalities, if a shared approach is taken) will take the lead in defining its energy goals and work plan for the grant period, **and will be responsible for adhering to any applicable procurement policies. Consideration of a minimum of three (3) consultant organizations is expected in order to satisfy competitive bid requirements.**

**Note:** A municipality receiving services under a third-party may not also request direct funding assistance, with the exception of staff training.

**Area of Interest 2 – Benchmarking Public Buildings**

Each year, Michigan building owners pay millions of dollars in unnecessary energy and water costs due to inefficiencies in their buildings. In order to reduce energy and water waste, the building owners should first identify the amount of resources being consumed
in their buildings. Benchmarking is the starting point for this process because ‘you can’t manage what you don't measure’. Without benchmarking, building owners wouldn’t know how their building is performing when compared to similar buildings nor would they be able to quantify or verify energy and water savings after building improvements are made.

Benchmarking will enable building owners to identify low performing buildings and will assist them in prioritizing improvements, and help them in building the business case for implementing energy conservation measures. Buildings eligible under this program include, but are not limited to, any public schools, municipal buildings, churches and congregations located in Michigan.

NOTE: Proposals should include commitment letter(s) from the building owners who are interested in having their buildings benchmarked. The commitment letter should clearly indicate that the organization is willing to share utility data for the last 24 months and should list the number of buildings and the total square footage it needs benchmarked. Applicants should complete the buildings & cost summary sheet based on the information provided in the commitment letter.

The Buildings & Cost Summary Sheet is available at:
http://www.michigan.gov/documents/energy/Buildings_Summary_Sheet_501673_7.xlsx

Area of Interest 3 – LED Lighting Conversion in Public Buildings

Energy savings of 30% or more are obtainable with installation of cost-effective energy efficient LED lights in place of the old T12 or T8 linear fluorescent lighting. The grant is offered to demonstrate the positive impacts that energy efficient LED lighting conversion can have on utility costs in public buildings. Buildings eligible under this program include, but are not limited to: any K-12 public school and/or municipal buildings located in Michigan. However, preference will be given to rural and urban school districts which are looking to convert their lighting to LEDs.

Eligible projects must upgrade existing lights either by retrofitting or replacing them with LED lights and achieve at least 30% energy savings, 50% maintenance savings and 50,000 hours between re-lamping while providing the appropriate lighting levels. The grant will pay up to 50% of the LED lighting equipment cost. Applicants will be responsible for remaining equipment, labor and other costs associated with the installation the LED lights. Award winners are expected to make project evaluation data (energy and cost saved) available to the Michigan Energy Office after the upgrades are made.

NOTE: Proposals should include an equipment description form with a description of the existing equipment (type, quantity, power consumption, operating hours, etc.) and also provide a description of the new/proposed equipment (type, total number, power consumption, operating hours, etc.).
The equipment description form is available at:
http://www.michiganbusiness.org/cm/Files/Energy_Office/Equip-Details-LED-St-
Lighting-Project.xlsx

III-F Program Priorities
To better allow the MEO to achieve the goals and requirements of the Community
Energy Programs RFP, applicants are encouraged to consider and incorporate the
following funding priorities within their proposals to the fullest extent possible:

1. Increasing accessibility to energy efficiency and renewable energy for Michigan
   communities, K-12 schools, and other public entities
2. Building the capacity of local governments, K-12 schools, and other public
   entities to manage their energy use over the long term.
3. Providing assistance to communities expected to be impacted by anticipated coal
   plant closures
4. Energy planning and project implementation among communities pursuing the
   MEDC’s Redevelopment Ready Communities® program and/or Michigan Green
   Communities Challenge
5. Showcasing energy efficiency and/or renewable energy as an adaptable,
   affordable, reliable, and energy waste-reducing solution for Michigan’s energy
   future.
6. Strategic deployment of energy efficiency and/or renewable energy projects
   across the state that leverage regional strengths and opportunities
7. Cultivating public-private partnerships and knowledge-sharing to expand the
   impact of renewable energy and/or energy efficiency projects and related best
   practices

NOTE: The MEO reserves the right to award funds for the purpose of achieving an
optimal range of energy efficient and/or renewable energy technology projects, and to
assure projects demonstrate their unique contribution and are not duplicative, or
effectively duplicate, previously funded projects of State services.

III-G Eligible Projects
For purposes of this RFP, the following types of entities are eligible to apply:

Eligible projects must involve/address community energy management and/or energy
efficiency in public buildings as described in Section III-A, Purpose, and III-E, Areas of
Interest. Impacted facilities must be occupied and have long range plans of continued use.

III-H Ineligible Projects

1. Projects deemed illegal under the law or inappropriate under contract
   management standards.
2. Projects considered scientifically unsound or significantly increase risks to workers and/or the public.

3. Projects that will not be conducted in Michigan.

4. Projects involving demonstration of non-commercially available equipment and technologies. This also includes projects involving the purchase of equipment to conduct research, development, or demonstration of energy efficient or renewable energy technologies that are not commercially available.

5. Projects not directed to or lacking significant onsite energy efficiency and/or renewable energy benefits.

6. Projects that cannot be shared with or have restricted transferability to other entities in Michigan.

7. Projects requiring an environmental assessment study under the National Environmental Policy Act (NEPA) of 1969 (42 U.S.C. Section 4321 et seq.) unless the applicant can show proof of the Department of Energy’s approval of the project.
PART IV
INFORMATION REQUIRED FROM APPLICANTS

Applicant(s) must complete the Worksheet in Section IV-A and attach the materials listed below. Applicant(s) must submit three hard copies and one electronic PDF copy of their application. Please note, no other worksheet or facsimile will be accepted. The hard copy worksheet must have an original signature.

NOTE: The following information must be submitted by all applicants to be considered. Failure to attach/include the requested information will result in the rejection of the proposal.

1. Proposal Worksheet (see link and instructions below). Indicate the Area of Interest you are responding to in the Project Title.
2. Approved Budget Form (see link and instructions below)
3. Detailed Timeline – timeline for successfully completing each required task, including key sub-tasks and critical decision points to be undertaken during the grant.
4. Applicant Organizational Chart – organizational chart detailing the management structure of the applicant organization.
5. An acknowledgement that the applicant has registered as a vendor with the State of Michigan on Contract and Payment Express (C&PE). If you are an existing vendor and have an account in C&PE, please verify that all your account information is correct. If not, please use the C&PE website to register. This web site is for the exclusive use of the vendors and individuals intent on doing business with the State of Michigan and allows you to be paid in the event that you are awarded a contract. Your registration may take up to two weeks to be processed.
   https://mainfacsp.dmb.state.mi.us/payee/servlet/us.mi.state.eft.WelcomeServlet
6. Charitable organizations and professional fundraisers (unless exempt) must be registered with the Michigan Attorney General’s Office Charitable Trust Section. For more information, please visit:
   http://www.michigan.gov/ag/0,4534,7-164-17337_18095---,00.html
7. Parent Organizational Chart (if applicable) – organizational chart detailing the management hierarchy of the Parent Organization, and its relationship to the applicant organization.
8. Partner Organizational Chart (if applicable) – organizational chart detailing the management hierarchy of the Partner Organization, and its relationship to the applicant organization. Attach an organizational chart for each Partner Organization.
9. Letter(s) of Support / Commitment from Partner Organization(s), including local governments, K-12 schools, and/or others receiving assistance under this grant.
10. Contact Information and Resumes of Personnel Listed in Budget.
11. Most recent copy of the A-133 or outside audit (IF an A-133 or outside audit has been completed) OR the most recent financial statements (balance sheet and income statement).
12. Additional Information and Comments (if applicable)
13. State Historic Preservation Office (SHPO) Section 106 Review Form [Attachment 1] (see link and instructions below)
14. National Environmental Policy Act (NEPA) Form [Attachment 2] (see link and instructions below)

15. If using PACE financing, a letter of qualification for PACE financing from the administrator of a PACE district participating in the Lean & Green Michigan public-private partnership (and/or other PACE administrator, if applicable).

16. Additional information required for each Areas of Interest:
   a. **Area of Interest 1 – Community Energy Management Implementation**
      Provide a brief summary of the status of each participating community’s EE/RE and CEM activities to date. Please also provide documentation of local government participation in the Michigan Green Communities Challenge, if applicable.

   b. **Area of Interest 2 - Benchmarking Public Buildings**
      Buildings & Cost Summary Sheet with total number of buildings and square footage.

   c. **Area of Interest 3 - LED Lighting Conversion in Public Buildings**
      Equipment description form – provide a description of the existing equipment (type, quantity, power consumption, operating hours, etc.) and also provide a description of the new/proposed equipment (type, total number, power consumption, operating hours, etc.).
      [http://www.michiganbusiness.org/cm/Files/Energy_Office/Equip-Details-LED-St-Lighting-Project.xlsx](http://www.michiganbusiness.org/cm/Files/Energy_Office/Equip-Details-LED-St-Lighting-Project.xlsx)

**Please see instructions below for additional information:**

**IV-A Proposal Worksheet**

Complete the Proposal Worksheet and attach additional sheets as necessary. Use the appropriate section headers when continuing answers on additional sheets. Please ensure that all text entered into the Proposal Worksheet fields is visible (i.e. not cut off) upon printing. *Also, please note that Adobe Reader 8 or higher is required in order to SAVE TEXT entered in the form. The latest version of Adobe Reader can be downloaded from [www.adobe.com](http://www.adobe.com) for free. It is recommended that applicants test the ability to save the form with text entered before entering a large amount of information into the form.*


**IV-B Approved Budget Form**

1. Applicant(s) must use the **Approved Budget Form** available here: [http://www.michigan.gov/documents/mdcd/Approved_Budget_Form_398684_7.xls](http://www.michigan.gov/documents/mdcd/Approved_Budget_Form_398684_7.xls)
   All budget categories must be addressed. Please use “N/A” or “None” to indicate there are no costs associated with a given budget category.
2. The following costs are **disallowed**: sick pay, holiday pay, paid vacation time, payroll taxes, vehicles, computers, real property (e.g. land and buildings), parking, tuition reimbursement/remission, vehicle allowance, car rental, subscriptions, dues, memberships, and repair of buildings and structures.

3. All applicants must provide a **minimum 200 percent (200%) match** of the total requested grant funds (aka “State share”).

4. The sum of the State share plus the recipient share of allowable costs will equal the total allowable project cost.

5. Personnel – include all staff performing work on the project. For each staff person, provide their name, job title, annual salary/wages, and percent of time dedicated to the grant project. **NOTE: The state may require Davis Bacon Act or prevailing wage rates to be paid.** Detailed information about the Davis Bacon Act can be found here: [http://www.dol.gov/compliance/guide/dbra.htm](http://www.dol.gov/compliance/guide/dbra.htm)

6. Fringe Benefits – allowable benefits typically include health insurance, dental insurance, and optical insurance. For each listed staff person, provide their fringe benefit rate, and confirm their annual fringe benefit cost. Note, applicant(s) will be required to detail/justify the fringe rates given in their proposed budget prior to an agreement being finalized.

7. Contractual Services – include all anticipated service contracts required for the project. Provide the vendor or contract name, the service to be provided, and the dollar amounts to be paid using grant funds and/or matching funds.

8. Supplies & Materials – include items costing less than $5,000 per unit. Provide the item, unit cost, and quantity of units. Confirm the matching funds amount, if applicable.

9. Equipment – include items costing $5,000 or more per unit and having a useful life of one year or more. Provide the item, unit cost, quantity of units, and the dollar amounts to be paid using grant funds, and/or matching funds.

10. Other Direct Costs - include all other known direct costs not otherwise categorized or disallowed. Provide the title/name and the cost of each item/service listed.

11. Travel – include all mileage, lodging, meals, and other known travel costs. Provide travel costs separately as mileage, lodging, meals, and other known travel costs. State of Michigan travel rates must be used for all travel expenses and out-of-state travel must be directly related to the grant project and approved by the State Energy Program Manager. State of Michigan Travel Rates are posted by the Michigan Department of Technology, Management & Budget. Use the rates provided here: [http://www.michigan.gov/dtmb/0,4568,7-150-9141_13132---,00.html](http://www.michigan.gov/dtmb/0,4568,7-150-9141_13132---,00.html)

12. Indirect Rate – Provide the indirect rate (up to 20% maximum) used by applicant’s organization as a percentage of total personnel and fringe benefits. Confirm the resulting dollar amount for grant funds. **Note: applicant(s) will be required to detail/justify their indirect rate given in their budget prior to an agreement being finalized.**

13. Totals – confirm the total dollar amounts for each listed line item and each column.

**Additional Budget Information:**

1. At such time that proposals are approved by the MEO, modifications of proposals may be necessary. If the MEO does not award the total amount requested in the original proposal, selected applicant(s) will be required to submit a revised proposal for the purpose of entering into a Grant Agreement. For those receiving less than requested
in their proposals, the proportion of direct costs to indirect costs will remain the same as in their original request. New line items to the revised budget are not allowed.

2. Selected applicant(s) assumes the responsibility for ensuring the grant project is performed within the established timeline.

3. Selected applicant(s) assumes the responsibility of ensuring all unexpended grant funds are returned to the State of Michigan at the end of the grant period.

4. If the entire State share of the grant award is expended, the entire in-kind and/or matched funds must be spent and supported by source documentation. If the entire State share of the grant award is not spent, the in-kind and/or matched funds may be reduced proportionately by the percentage of the grant award not spent.

5. Indirect costs must be proportionately reduced if the selected applicant(s) does not expend the entire grant award by the end of the grant term. The adjustment for the reduction shall be calculated by determining the percentage of the grant not spent. This percentage is the amount to be reduced from the indirect costs total. Indirect costs shall be based on a percentage of the budget line items listed under the State share column. Indirect costs must be utilized for this grant within the established timeline.

6. Selected applicant(s) may not commingle award funds with current or future awards received from the SEP. Financial assistance from each funding source must be managed, reported, and accounted for separately from all funding sources.

7. Should selected applicant(s) cease business operations or dissolve the program established under the grant agreement, existing capital must be returned to the State of Michigan.

8. The State and MEO anticipate the grant period will start October 1, 2016 and will end on August 31, 2017.

IV-C State Historic Preservation Office (SHPO) Section 106 Review Form (Attachment 1)
If the applicant is conducting ground-disturbing activity or work on a building(s) that is/are at least fifty years of age or older, applicant must complete in full the State Historic Preservation Office Application for Section 106 Review. The review process must be completed prior to the expenditure of federal funds. No project that results in an adverse effect to a historic property will be considered for funding. Projects may be modified to avoid adverse effects. Submit this form with your proposal to the Michigan Energy Office. The MEO will review and forward to the State Historic Preservation Office as necessary.

ATTACHMENT 1 is available here:

IV-D National Environmental Policy Act (NEPA) Form [Attachment 2]
All activities undertaken with grant funds must comply with the National Environmental Policy Act (NEPA) of 1969 (42 U.S.C. Section 4321 et seq). It is the Recipient’s responsibility to acquire all necessary environmental permits to operate in the State of Michigan. Submit this form with your proposal.

ATTACHMENT 2 is available here:
http://www.michigan.gov/documents/mdcd/MEO_NEPA_FORM_433885_7.doc