

State of Michigan
Department of Energy, Labor & Economic Growth

MICHIGAN PUBLIC SERVICE COMMISSION

REQUEST FOR PROPOSAL LOW-INCOME ENERGY EFFICIENCY GRANT (CASE NO. U-13129)

ESTIMATED TIMELINE	
Issue Date	Friday, February 25, 2011
Inquiries Due	Thursday, March 31, 2011
Proposals Due	Friday, April 29, 2011
Anticipated Start Date	Saturday, October 1, 2011



FEBRUARY 25, 2011

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LOW-INCOME ENERGY EFFICIENCY GRANT REQUEST FOR PROPOSAL

PART I: GENERAL GRANT INFORMATION

I-A Statement of Purpose

The purpose of this Request for Proposal (RFP) is to obtain proposals from organizations that will improve energy efficiency and reduce energy consumption of Michigan low-income residents. Organizations will work to implement energy efficiency projects that can include all of the following components: weatherization; energy education; and replacement of furnaces, water heaters, and other appliances with high-efficiency models. Appliance replacement programs must demonstrate participation in appropriate recycling programs for replaced appliances. Projects should complement existing programs by allowing low-income household eligibility up to 250% of the federal poverty guidelines.¹ Up to 20% of awarded grant funds may be used for house repairs to improve energy efficiency by replacing roofs, windows, and doors.

The total amount available for this Low-Income Energy Efficiency (LIEE) Grant is \$18 million. It is anticipated that one or more grants will be awarded in a Michigan Public Service Commission Order in August or September 2011, and the grant period is expected to begin October 1, 2011 and end December 31, 2012.

The grant(s) awarded from this solicitation will support actual expenditures incurred within the grant period that are supported by source documentation (further defined in Section II-G: Accounting). This RFP provides interested parties with sufficient information to enable them to prepare and submit a proposal, budget, budget narrative, and timeline. Refer to Part V: Information Required from Applicant.

I-B Eligibility Requirements

To be eligible to receive a grant under this RFP, the applicant must be a nonprofit or public organization offering service to low-income residents in Michigan. For the purposes of this grant program, governmental agencies and educational institutions are considered public organizations. Preference will be given to applicants that are Michigan-based.

I-C Issuing Office and Funding Source

This RFP is issued by the Michigan Public Service Commission (Issuing Office or Commission), an agency within the Department of Energy, Labor & Economic Growth (Department or DELEG). The Commission is the point of contact for this RFP for purposes of grant administration. The contact person at the Commission is:

¹ Eligible clients are low-income individuals and/or households whose income is at or below 250% of the federal poverty guidelines determined by the U.S. Department of Health and Human Services. See: <http://aspe.hhs.gov/poverty/index.shtml>.

Cheryl Rojas, Grant Administrator
Michigan Public Service Commission
Management Services Division
6545 Mercantile Way
Lansing, MI 48911

The initial funding source for this grant is the Low-Income and Energy Efficiency Fund (LIEEF) established by 2000 PA 141, MCL 460.10d(6). The Michigan Public Service Commission is the administrator of the LIEEF. The distribution of monies from this fund is contingent upon the passage of, and will be consistent with, the Department's 2012 Appropriations Bill.

On February 20, 2004, the Commission issued an order in Case No. U-13808 granting interim rate relief, rolling securitization savings into base rates for Detroit Edison's electric customers and continued funding of the LIEEF as part of the utility's cost of service. The funding mechanism for the LIEEF was affirmed in the Commission's final order issued on November 23, 2004, authorizing Detroit Edison to provide approximately \$39.9 million annually to the LIEEF.

On December 22, 2005, the Commission issued an order in Case No. U-14347 authorizing Consumers Energy to provide approximately \$26.5 million annually for the LIEEF from its electric customers. On November 21, 2006, the Commission issued an order in Case No. U-14547 authorizing Consumers Energy to provide approximately \$17.4 million annually for the LIEEF from its natural gas customers.

On June 3, 2010, the Commission issued an order in Case No. U-15985 authorizing Michigan Consolidated Gas Company to provide approximately \$5.1 million annually to the LIEEF from its natural gas customers.

I-D Grant Award

Grant award negotiations will be undertaken with the applicant(s) whose proposal shows the organization to be responsible, highly qualified, and capable of performing the project within the established timeline. It is expected that one or more grants will be awarded. The total amount available for these grants is \$18 million.

The grant(s) that may be entered into will be based on the RFP selection criteria provided in Part V: Information Required from Applicant and the objectives of the Commission.

I-E Rejection of Proposals

The State reserves the right to reject any and all proposals received as a result of this RFP.

I-F Incurring Costs

The State of Michigan is not liable for any cost incurred by an applicant prior to signing of a Grant Agreement.

I-G Pre-Proposal Conference

No pre-proposal conference will be held for this RFP. Inquiries should be submitted as outlined in Section I-H: Inquiries.

I-H Inquiries

Questions that arise as a result of this RFP must be submitted no later than **3:00 PM on Thursday, March 31, 2011**. Inquiries may be submitted electronically to the Issuing Office at mpsc-grants@michigan.gov or made in writing to the Grant Administrator at the address listed in Section I-C: Issuing Office and Funding Source. All inquiries should reference LIEE Grant, Case No. U-13129.

Inquiries will be responded to and posted on the Commission's website at www.michigan.gov/liefund under "Spotlight."

I-I Changes to the RFP

Written answers to questions that change or substantially clarify the RFP will be provided to all prospective applicants on the Commission's website at www.michigan.gov/liefund.

I-J Due Date

To be considered for a grant award, a proposal must be received in the Issuing Office no later than **3:00 PM on Friday, April 29, 2011**. Proposals must reference LIEE Grant, Case No. U-13129. **Proposals must be submitted electronically to mpsc-grants@michigan.gov**. A confirmation will be sent by the Issuing Office within 24 hours of receipt. If a confirmation is not received, applicant must contact the Grant Administrator identified in Section I-C: Issuing Office and Funding Source. Electronic submission of PDF documents cannot exceed 15 MB. Mailed, hand delivered, and faxed proposals will not be accepted.

I-K Proposals

To be considered, applicants must submit a complete response to this RFP using the format specified in Part V: Information Required from Applicant. The proposal must be signed by an official authorized to bind the applicant to the provisions of this RFP. For this RFP, the proposal must remain valid for at least 180 days.

I-L Acceptance of Proposal Content

The contents of this RFP and the proposal of the selected applicant may become grant obligations if a grant award ensues. Failure of the selected applicant(s) to accept these obligations may result in cancellation of the award.

I-M Economy of Preparation

Using the format provided in Part V: Information Required from Applicant, proposals should be prepared providing a straight-forward, concise description of the applicant's ability to meet the requirements of the RFP. Emphasis should be on completeness and clarity of content.

I-N Prime Applicant Responsibilities

The selected applicant(s) will be required to assume responsibility for all services offered in their proposal whether or not they possess them within their organization. Further, the State will consider the selected applicant(s) to be the sole point of contact with regard to grant matters, including payment of any and all charges resulting from the grant.

I-O Partner Responsibilities

Organizations partnering with selected applicant(s) must comply with the requirements of the RFP and will be held to the same standards as prime applicants. Partnering organizations must respond to Part V: Information Required from Applicant and must make grant accounting records available for audit by the Issuing Office in accordance with Section II-G: Accounting and Section II-H: Audit. Selected applicant(s) must enter into a partnership agreement with partnering organizations. A copy of the partnership agreement signed by all parties must be provided to the Grant Administrator.

I-P Grant Payment Schedule

Payment for any grant entered into as a result of this RFP will be made according to the following schedule:

An initial advance of 45% of the total grant award will be made to the selected applicant(s) after a Grant Agreement is fully executed. An additional advance may be provided upon submission of documentation to the State showing 90% of the previous advance has been expended and an appropriate level of progress has been made toward completing the project. 10% of the total grant amount will be held back pending completion of the project and submission of final documentation and reporting requirements.

Public Act 279 of 1984, MCL 17.52, states that the State shall take all steps necessary to assure that payment for goods or services is mailed within 45 days after receipt of the goods or services, a complete invoice for goods or services, or a complete contract for goods or services, whichever is later.

I-Q News Releases

News releases pertaining to this RFP or the service, study, or project to which it relates shall not be made without prior State approval and coordination with the Michigan Public Service Commission.

I-R Disclosure of Proposal Contents

The information in all proposals and any grant resulting from the RFP are subject to disclosure under the Michigan Freedom of Information Act, 1976 PA 442, as amended, MCL 15.231, *et seq.*

I-S Copyrighted Materials

The selected applicant(s) shall agree to grant to the State a nonexclusive, irrevocable license to reproduce, translate, publish, use, and dispose of all copyrightable material developed as a result of the project.

PART II: GENERAL PROVISIONS

II-A Project Changes

The selected applicant(s) *must* obtain prior written approval for major project changes from the Grant Administrator.

II-B Record Retention

The selected applicant(s) shall retain all financial records, supporting documents, statistical records, and all other pertinent records for a period of seven (7) years or greater as provided by law following the creation of the records or documents.

II-C Program Income

To the extent that it can be determined that interest was earned on advances of funds, such interest shall be remitted to the grantor. All other program income shall either be added to the program budget and used to further eligible program objectives or deducted from the total program budget for the purpose of determining the amount of reimbursable costs. The final determination shall be made by the Grant Administrator.

II-D Share-in-Savings

The grantor expects to share in any cost savings realized by the selected applicant(s). Therefore, final grantee reimbursement will be based on actual expenditures. Exceptions to this requirement must be approved in writing by the Grant Administrator.

II-E Order of Spending

Unless otherwise required, the selected applicant(s) shall expend funds in the following order: (1) private or local funds, (2) federal funds, and (3) State funds. The selected applicant(s) is responsible for securing any required matching funds from sources other than the State.

II-F Purchase of Equipment

The purchase of equipment not specifically listed in the budget must have prior written approval of the Grant Administrator. Equipment is defined as non-expendable personal property having a useful life of more than one year. Such equipment shall be retained by the selected applicant(s) unless otherwise specified at the time of approval.

II-G Accounting

The selected applicant(s) shall adhere to the Generally Accepted Accounting Principles and shall maintain records which will allow, at a minimum, for the comparison of actual outlays with budgeted amounts. The selected applicant's overall financial management system must ensure effective control over and accountability for all funds received. Accounting records must be supported by source documentation including, but not limited to, balance sheets, general ledgers, time sheets and invoices. The expenditure of State funds shall be reported by line item and compared to the budget.

II-H Audit

The selected applicant(s) agrees that the State may, upon 24-hour notice, perform an audit and/or monitoring review at the selected applicant's location(s) to determine if the selected applicant(s) is complying with the requirements of the Grant Agreement. The selected applicant agrees to cooperate with the State during the audit and/or monitoring review and produce all records and documentation that verifies compliance with the Grant Agreement requirements. The grantor may require the completion of an audit before final payment.

If selected applicant(s) is a recipient of Low-Income and Energy Efficiency funds and receives \$100,000 or more in any 12-month period, then the selected (s) is required to submit an audited financial report to the grantor within thirty (30) days after the completion of the audit; but no later than nine (9) months after the end of the grantee's fiscal year.

II-I Competitive Bidding

The selected applicant(s) agrees that all procurement transactions involving the use of State funds shall be conducted in a manner that provides maximum open and free competition. When competitive selection is not feasible or practical, the selected applicant(s) agrees to obtain the written approval of the Grant Administrator before making a sole source selection. Sole source contracts should be negotiated to the extent that such negotiation is possible.

II-J Liability

The State is not liable for any costs incurred by the selected applicant(s) before the start date or after the end date of the Grant Agreement. Liability of the State is limited to the terms and conditions of the Grant Agreement and the grant amount.

II-K Intellectual Property

Unless otherwise required by law, all intellectual property developed using funds from the Grant Agreement, including copyright, patent, trademark and trade secret, shall belong to the selected applicant(s).

II-L Safety

The selected applicant(s), all contractors, and subcontractors are responsible for insuring that all precautions are exercised at all times for the protection of persons and property. Safety provisions of all applicable laws and building and construction codes shall be observed. The selected applicant(s), contractors, and every subcontractor are responsible for compliance with all federal, State and local laws and regulations in any manner affecting the work or performance of the Grant Agreement and shall at all times carefully observe and comply with all rules, ordinances, and regulations. The selected applicant(s), all contractors and subcontractors shall secure all necessary certificates and permits from municipal or other public authorities as may be required in connection with the performance of the Grant Agreement.

II-M Indemnification

(1) General Indemnification

To the extent permitted by law, the selected applicant(s) shall indemnify, defend and hold harmless the State from liability, including all claims and losses, and all related costs and expenses (including reasonable attorneys' fees and costs of investigation, litigation, settlement, judgments, interest and penalties), accruing or resulting to any person, firm or corporation that may be injured or damaged by the selected applicant(s) in the performance of the Grant Agreement and that are attributable to the negligence or tortious acts of the selected applicant(s) or any of its subcontractors, or by anyone else for whose acts any of them may be liable.

(2) Employee Indemnification

In any and all claims against the State, its departments, divisions, agencies, sections, commissions, officers, employees and agents, by any employee of the selected applicant(s) or any of its subcontractors, the indemnification obligation under the Grant Agreement shall not be limited in any way by the amount or type of damages, compensation or benefits payable by or for the selected applicant(s) or any of its subcontractors under worker's disability compensation acts, disability benefit acts or other employee benefit acts. This indemnification clause is intended to be comprehensive. Any overlap in provisions, or the fact that greater specificity is provided as to some categories of risk, is not intended to limit the scope of indemnification under any other provisions.

(3) Patent/Copyright Infringement Indemnification

To the extent permitted by law, the selected applicant(s) shall indemnify, defend and hold harmless the State from and against all losses, liabilities, damages (including taxes), and all related costs and expenses (including reasonable attorneys' fees and costs of investigation, litigation, settlement, judgments, interest and penalties) incurred in connection with any action or proceeding threatened or brought against the State to the extent that such action or proceeding is based on a claim that any piece of equipment, software, commodity or service developed or supplied by the selected applicant(s) or its subcontractors, or the operation of such equipment, software, commodity or service, or the use or reproduction of any documentation provided with such equipment, software, commodity or service infringes any United States patent, copyright, trademark or trade secret of any person or entity, which is enforceable under the laws of the United States.

The selected applicant's duty to indemnify pursuant to this section continues in full force and effect, notwithstanding the expiration or early cancellation of the Grant Agreement, with respect to any claims based on facts or conditions that occurred before expiration or cancellation.

II-N Cancellation

The State may terminate the Grant Agreement without further liability or penalty to the State, its departments, divisions, agencies, offices, commissions, officers, agents and employees for any of the following reasons:

(1) Termination for Cause

In the event that selected applicant(s) breaches any of its material duties or obligations under the Grant Agreement or poses a serious and imminent threat to the health and safety of any person, or the imminent loss, damage or destruction of any real or tangible personal property, the State may terminate the Grant Agreement immediately in whole or in part, for cause, as of the date specified in the notice of termination. In the event that the Grant Agreement is terminated for cause, in addition to any legal remedies otherwise available to the State by law or equity, selected applicant(s) shall be responsible for all costs incurred by the State in terminating the Grant Agreement, including but not limited to, State administrative costs, reasonable attorney's fees and court costs, and any reasonable additional costs the State may incur.

(2) Termination for Convenience

The State may terminate the Grant Agreement for its convenience, in whole or part, if the State determines that such a termination is in the State's best interest. Reasons for such termination shall be left to the sole discretion of the State and may include, but not necessarily be limited to (a) the State no longer needs the services or products specified in the Grant Agreement, (b) relocation of office, program changes, changes in laws, rules, or regulations make implementation of the services no longer practical or feasible. The State may terminate the Grant Agreement for its convenience, in whole or in part, by giving selected applicant(s) written notice at least thirty (30) days prior to the date of termination. If the State chooses to terminate this Grant Agreement in part, the budget shall be equitably adjusted to reflect those reductions.

(3) Non-Appropriation

Selected applicant(s) acknowledges that continuation of the Grant Agreement is subject to appropriation or availability of funds for the Grant Agreement. If funds to enable the State to effect continued payment under the Grant Agreement are not appropriated or otherwise made available (including the federal government suspending or halting the program or issuing directives preventing the State from continuing the program), the State shall have the right to terminate this Grant Agreement, in whole or in part, at the end of the last period for which funds have been appropriated or otherwise made available by giving written notice of termination to selected applicant(s). The State shall give selected applicant(s) at least thirty (30) days advance written notice of termination for non-appropriation or unavailability (or such time as is available if the State receives notice of the final decision less than thirty (30) days before the funding cutoff). In the event of a termination under this section, the selected applicant(s) shall, unless otherwise directed by the State in writing, immediately take all reasonable steps to terminate its operations and to avoid and/or minimize further expenditures under the Grant Agreement.

(4) Criminal Conviction

The State may terminate the Grant Agreement immediately and without further liability or penalty in the event selected applicant(s), an officer of selected applicant(s), or an owner of a 25% or greater share of selected applicant(s) is convicted of a criminal offense incident to the application for, or performance of, a State, public or private contract or subcontract or grant; convicted of a criminal offense, including any of the following: embezzlement, theft, forgery, bribery, falsification or destruction of records, receiving stolen property, attempting to influence a public employee to breach the ethical conduct standards for State of Michigan employees;

convicted under State or federal antitrust statutes; or convicted of any other criminal offense which in the sole discretion of the State, reflects upon selected applicant's business integrity.

(5) Approvals Rescinded

The State may terminate the Grant Agreement without further liability or penalty in the event any final administrative or judicial decision or adjudication disapproves a previously approved request for purchase of personal services pursuant to Constitution 1963, Article 11, § 5, and Civil Service Rule 7-1. Termination may be in whole or in part and may be immediate as of the date of the written notice to selected applicant(s) or may be effective as of the date stated in such written notice.

II-O No State Employees or Legislators

No member of the Legislature or Judiciary of the State of Michigan or any individual employed by the State shall be permitted to share in the Grant Agreement, or any benefit that arises from the Grant Agreement.

II-P Non-Discrimination

In the performance of the Grant Agreement, selected applicant(s) agrees not to discriminate against any employee or applicant for employment, with respect to his or her hire, tenure, terms, conditions or privileges of employment, or any matter directly or indirectly related to employment, because of race, color, religion, national origin, ancestry, age, sex, height, weight, marital status, physical or mental disability. Selected applicant(s) further agrees that every subcontract entered into for the performance of the Grant Agreement will contain a provision requiring non-discrimination in employment, as here specified, binding upon each subcontractor. This covenant is required pursuant to the Elliott Larsen Civil Rights Act, 1976 PA 453, MCL 37.2101, *et seq.* and the Persons with Disabilities Civil Rights Act, 1976 PA 200, MCL 37.1101, *et seq.*, and any breach of this provision may be regarded as a material breach of the Grant Agreement.

II-Q Unfair Labor Practices

Pursuant to 1980 PA 278, MCL 423.231, *et seq.*, the State shall not award a grant or subcontract to an employer whose name appears in the current register of employers failing to correct an unfair labor practice compiled pursuant to section 2 of the Act. This information is compiled by the United States National Labor Relations Board. A selected applicant, in relation to the Grant Agreement, shall not enter into a contract with a subcontractor, manufacturer, or supplier whose name appears in this register. Pursuant to section 4 of 1980 PA 278, MCL 423.324, the State may void any Grant Agreement if, subsequent to award of the Grant Agreement, the name of grantor as an employer or the name of the subcontractor, manufacturer or supplier of grantor appears in the register.

II-R Certification Regarding Debarment

The selected applicant(s) certifies, by signature to the Grant Agreement, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in the Grant Agreement by any federal or State

department or agency. If the selected applicant(s) is unable to certify to any portion of this statement, the selected applicant(s) shall attach an explanation to the Grant Agreement.

II-S Illegal Influence

(1) The selected applicant(s) certifies, to the best of his or her knowledge and belief that:

(a) No federal appropriated funds have been paid nor will be paid, by or on behalf of the selected applicant(s), to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan or cooperative agreement.

(b) If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with this grant, the selected applicant(s) shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.

(c) The selected applicant(s) shall require that the language of this certification be included in the award documents for all grant or subcontracts and that all subrecipients shall certify and disclose accordingly.

The State has relied upon this certification as a material representation. Submission of this certification is a prerequisite for entering into this Grant Agreement imposed by 31 USC § 1352. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

(2) The selected applicant(s) certifies, to the best of his or her knowledge and belief that no State funds have been paid nor will be paid, by or on behalf of the selected applicant(s), to any person for influencing or attempting to influence an officer or employee of any State agency, a member of the Legislature, or an employee of a member of the Legislature in connection with the awarding of any State contract, the making of any State grant, the making of any State loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any State contract, grant, loan or cooperative agreement.

II-T Governing Law

The Grant Agreement shall in all respects be governed by, and construed in accordance with, the substantive laws of the State of Michigan without regard to any Michigan choice of law rules that would apply the substantive law of any other jurisdiction to the extent not inconsistent with, or pre-empted by federal law.

II-U Compliance with Laws

Selected applicant shall comply with all applicable State, federal, and local laws and ordinances ("Applicable Laws") in performing this Grant Agreement.

II-V Jurisdiction

Any dispute arising from the Grant Agreement shall be resolved in the State of Michigan. With respect to any claim between the parties, selected applicant(s) consents to venue in Ingham County, Michigan, and irrevocably waives any objections it may have to such jurisdiction on the grounds of lack of personal jurisdiction of such court or the laying of venue of such court or on the basis of forum non conveniens or otherwise. Contractor agrees to appoint agents in the State of Michigan to receive service of process.

II-W Assignment

Selected applicant(s) shall not have the right to assign the Grant Agreement, or to assign or delegate any of its duties or obligations under the Grant Agreement, to any other party (whether by operation of law or otherwise), without the prior written consent of the grantor. Any purported assignment in violation of this section shall be null and void.

II-X Entire Grant Agreement

The Grant Agreement, including any Attachments, will constitute the entire Grant Agreement between the parties with respect to the grant and supersedes all prior Grant Agreements, whether written or oral, with respect to such subject matter.

II-Y Independent Contractor Relationship

The relationship between the State and selected applicant(s) is that of client and independent contractor. No agent, employee, or servant of selected applicant(s) or any of its subcontractors shall be or shall be deemed to be an employee, agent or servant of the State for any reason. Selected applicant(s) will be solely and entirely responsible for its acts and the acts of its agents, employees, servants and subcontractors during the performance of the Grant Agreement.

II-Z Conflicts

In the event of a conflict between the terms of the Grant Agreement and any federal or State laws or regulations, the federal or State laws or regulations will supersede any contrary term contained in the Grant Agreement.

PART III: WORK STATEMENT

III-A Purpose

The purpose of this Request for Proposal (RFP) is to obtain proposals from organizations that will improve energy efficiency and reduce energy consumption of Michigan low-income residents. Organizations will work to implement energy efficiency projects that can include all of the following components: weatherization; energy education; and replacement of furnaces, water heaters, and other appliances with high-efficiency models. Appliance replacement programs must demonstrate participation with appropriate recycling programs for replaced appliances. Projects should complement existing programs by allowing low-income household eligibility up to 250% of the federal poverty guidelines.² Up to 20% of grant funds may be used for house repairs to improve energy efficiency by replacing roofs, windows, and doors.

III-B Problem Statement

Compared with an estimated 5% for other households, low-income households (100% of poverty) may spend up to 25% of their income on household energy bills. Any increase in energy costs can have a significant impact on low-income household budgets. As Michigan's economic situation tightens, low-income households consequently face increasing challenges in meeting their energy needs. Any reduction in energy expenditures can have a positive impact on the household's economic security. Therefore, low-income residents will benefit from implementation of projects that reduce the amount of energy their households use. Energy efficiency improvements for low-income residents may be a cost effective solution and alternative to bill payment assistance, and can provide future economic, social, and environmental benefits.

III-C Objectives

- (1) Facilitate improvements to low-income customers' homes that increase energy efficiency and reduce energy consumption.
- (2) Provide education that focuses on reducing the energy consumption of low-income residents.
- (3) Supplement existing energy efficiency programs, enabling the selected applicant(s) to increase the reach of services provided to clients, serve more clients at the existing service levels and under current eligibility guidelines, and/or expand the eligibility requirements to include low-income households not eligible under current eligibility guidelines.
- (4) Leverage other funds to provide additional low-income energy efficiency services.

² Eligible clients are low-income individuals and/or households whose income is at or below 250% of the federal poverty guidelines determined by the U.S. Department of Health and Human Services. See: <http://aspe.hhs.gov/poverty/index.shtml>.

III-D Tasks

- (1) Coordinate availability of this low-income energy efficiency program with other services currently provided by the selected applicant.
- (2) Determine if the clients meet eligibility requirements by utilizing the criteria outlined in Appendix C to this RFP.
- (3) Provide energy efficiency measures to eligible clients within the established timeline in accordance with the Grant Agreement.
- (4) Establish and implement quality control measures to ensure funds are used for the intended purpose.
- (5) Coordinate the proposed project with other agencies that provide energy assistance, weatherization, and education focused on reducing energy consumption.
- (6) Provide energy efficiency measures through the organization's existing administrative framework.
- (7) Provide reports and materials as outlined in Section IV-B: Monitoring and Reporting Program Performance.
- (8) Objectively evaluate the success of the program.
- (9) Conduct post-installation inspections to verify completion and existence of installed energy efficiency measures. This inspection should have a checklist and must be signed by a representative of the selected applicant and the homeowner. Checklists must be retained according to the terms in Section II-B: Record Retention.

PART IV: PROJECT CONTROL AND REPORTS

IV-A Project Control

The selected applicant(s) will carry out the project under the review of the Grant Administrator. The Michigan Department of Energy, Labor & Economic Growth Grant Administrator shall have final authority over the Grant Agreement.

Along with continuous liaison with the selected applicant(s), the Grant Administrator will meet as needed with the selected applicant(s)'s contact person for the purpose of reviewing progress and providing necessary guidance to the selected applicant(s) in solving problems that arise.

Prior to executing any changes to the scope of the project and/or budget, the selected applicant must inform the Grant Administrator in writing outlining the proposed changes. Changes to the Grant Agreement, including the budget, can only be made during the term of the grant.

IV-B Monitoring and Reporting Program Performance

The selected applicant(s) will be required to assume responsibility for monitoring and reporting. The selected applicant(s) shall monitor performance to assure that time schedules are met and projected work by time period is accomplished. If a required report's due date falls on a weekend or holiday, the report may be delivered the following business day.

(1) **Quarterly Project Status Reports.** The selected applicant(s) shall submit quarterly project status reports to the Grant Administrator no later than the 15th of January, April, July, and October 2012. The reports should include the following information at a minimum:

- (a) **Project Identification**
Name of selected applicant, grant number, and dates of current reporting period.
- (b) **Project Milestones**
Percent (%) completion of the project objectives.
- (c) **Project Progress**
Brief outline of the work accomplished during the reporting period and the work to be completed during the subsequent reporting period(s).
- (d) **Performance Measures**
The following information should be provided for the current reporting period and for the total grant term to date:
 - (i) Total number of households served and number of participants by county.
 - (ii) Total number of households served based on federal poverty guidelines. Data should be provided for clients at or below 100% of poverty, between 101% and 150% of poverty, between 151% and 200% of poverty, and between 201% and 250% of the poverty.

- (iii) Type of services provided and the anticipated savings as a result of the program.
- (e) **Noteworthy Accomplishments**
Identify and describe any milestones reached or noteworthy accomplishments completed during the period.
- (f) **Delays**
Brief description of problems or delays, real or anticipated, which should be brought to the attention of the Grant Administrator.
- (g) **Project Deviations**
Statement concerning any significant deviation from the previously agreed-upon work plan developed in Part V: Information Required from Applicant.
- (h) **Attachments and Other Materials**
Provide project materials developed and implemented during the reporting period (e.g., newspaper articles, newspaper advertisements, forms, brochures, announcements, studies, reports, analyses, audits, etc.).
- (i) A record of all upgrades and/or repairs performed using grant funds during the reporting period. The record shall contain separate fields for the street address, city, state, zip code, contractor name, date of upgrade(s) and/or repair(s), dollar amount of upgrade(s) and/or repair(s), and type upgrade(s) and/or repair(s) performed. The Grant Administrator will provide the selected applicant(s) with a MS Excel Spreadsheet to track these transactions.
- (j) For each reporting period, provide copies of eligibility verification documents collected from at least three eligible clients that were provided energy efficiency measures.

(2) **Quarterly Financial Status Reports (FSR)/Payment Requests.** The selected applicant(s) shall submit a signed and dated FSR/Payment Requests to the Grant Administrator indicating the amount of funds expended in each line item category of the budget. Quarterly FSR/payment requests are due the 15th of January, April, July, and October 2012. FSR/payment requests will be completed on Form C-108, which will be provided to selected applicant(s) by the Grant Administrator.

(3) **Final Project Status Report.** The selected applicant(s) shall submit a draft of the final project status report by Tuesday, January 15, 2013. After the Grant Administrator has determined the completeness and factual accuracy of the report, the selected applicant shall submit a final copy of the report to the Grant Administrator. The final project status report shall include the following information at a minimum:

- (a) **Project Identification**
Name of selected applicant, grant number, and dates of current reporting period.
- (b) **Project Milestones**
Percent (%) completion of the project objectives

- (c) **Project Implementation**
A summary of the project implementation plan and any deviations from the original plan as proposed.
- (d) **Performance Measures**
The following information should be provided for the current reporting period and for the total grant term:
 - (i) Total number of households reached by the project and the number of participants by county.
 - (ii) Total number of households served based on federal poverty guidelines. Data should be provided for clients at or below 100% of poverty, between 101% and 150% of poverty, between 151% and 200% of poverty, and between 201% and 250% of poverty.
 - (iii) The type of services provided.
 - (iv) The average energy savings per household, the total estimated amount of savings for the year, and the basis for the estimation.
- (e) **Noteworthy Accomplishments**
Accomplishments and problems experienced while carrying out project activities.
- (f) **Coordinated Efforts**
Coordinated efforts with other organizations to complete the project.
- (g) **Project Impacts**
Impacts, anticipated and unanticipated, experienced as a result of project implementation.
- (h) **Next Steps**
Any experience in applying the project products and “next steps.”
- (i) **Financial Summary**
Financial expenditures of grant funds and other contributions to the project, cost share and/or direct funding. Include the basis or reason for any discrepancies.
- (j) **Evaluation**
Evaluate the success of the program according to the criteria developed Section V-E(6).
- (k) **Attachments and Other Materials**
Provide project materials developed and implemented that were not provided with quarterly project status reports (e.g., newspaper articles, newspaper advertisements, forms, brochures, announcements, studies, reports, analyses, audits, etc.)
- (l) A record of all upgrades and/or repairs performed using grant funds during the grant term. The record shall contain separate fields for the street address, city, state, zip code, contractor name, date of upgrade(s) and/or repair(s), dollar amount of upgrade(s) and/or repair(s), and type upgrade(s) and/or repair(s) performed.

The Grant Administrator will provide the selected applicant(s) with a MS Excel Spreadsheet to track these transactions.

- (m) For the period October 1, 2012 through December 31, 2012, provide copies of eligibility verification documents collected from at least three eligible clients that were provided energy efficiency measures.

(4) **Final FSR/Payment Request.** The selected applicant(s) shall submit a signed and dated final FSR/payment request to the Grant Administrator indicating the amount of funds expended in each line item category of the budget by Tuesday, January 15, 2013.

PART V: INFORMATION REQUIRED FROM APPLICANT

Grant proposals must be typed in 12 point, Times New Roman font with no more than 40 numbered, double-spaced pages. The page count includes any cover page and/or attachments. Electronically submitted proposals must have a scanned signature or e-signature and cannot exceed 15 MB.

Applicant must provide responses to each section below. Please follow the format identified by stating the section number and title followed by the response. Be as descriptive as possible and answer each question in its entirety; some questions have multiple components. Questions that do not apply should be answered "NA."

V-A Identification of Organization

State the full name and address of the organization, the organization's federal identification number, and the organization's telephone and fax number.

V-B Authorized Negotiator

State the name of one (1) contact person and his/her telephone number, fax number, and electronic mail address. The contact person must be authorized to be the negotiator for the proposed Grant Agreement with the State.

V-C Method for Addressing the Problem

State in succinct terms the applicant's proposed method for addressing the problem presented in Section III-B: Problem Statement. Describe any significant obstacles the applicant has had meeting the needs of low-income clients while providing energy efficiency measures.

V-D Management Summary

(1) Provide a brief summary of the organization, including the length of time the organization has been in existence, the type of projects the organization generally performs, and the size of the organization (e.g. number of employees, etc.).

(2) Describe management procedures that will be used by the organization to complete the proposed project.

(3) Describe the organization's quality control measures.

(4) Describe the organization's internal control over accounting, identify the type of accounting system/software the organization will use to account for grant funds, and indicate whether internal and external audits of the organization's operations are performed on an annual basis.

(5) The percentage of the organization's totaling funding for the anticipated grant period the grant award will represent.

(6) Any other information that may be applicable to the proposed project.

This section should identify the project manager and the individual(s) responsible for financial management and reporting. It should also provide a summary of how the proposed project will be monitored to ensure funds are used for the intended purpose, project milestones and timelines are met, and quality control and assurance standards are followed.

V-E Work Plan

(1) Provide a clear and concise plan for providing energy efficiency measures for low-income households. The plan should include the following components at a minimum:

- (a) Identify objectives and milestones for the proposed project.
- (b) Identify the types of services to be provided and justification for offering those particular services.
- (c) Describe how applications will be taken and low-income client eligibility will be determined and verified (client verification must be consistent with the criteria outlined in Appendix C to this RFP). Include the organization's household income eligibility limit in terms of percentage of poverty.
- (d) Forecast the number of eligible low-income households to be served and the geographic area to be covered. If the selected applicant does not intend to provide services statewide, identify the counties that will be served. Provide the factors used to determine the amount of funds distributed to each county in the organization's coverage area.
- (e) Describe how energy savings will be quantified.
- (f) Describe expected benefits to be derived from the proposed project.

(2) Explain how this plan will be coordinated with other services offered by the applicant.

(3) Explain how the applicant coordinates with agencies that provide energy assistance to low-income customers confronted with energy shut-of by utility companies and deliverable fuel providers.

(4) Provide details on other funds available to the applicant that will be used directly for this grant project and the anticipated source of those funds.

(5) Provide a timeline for completing the planned activities and tasks for the proposed project during the grant period. A month-by-month format shall include at a minimum:

- (a) The estimated number of clients participating.
- (b) The required dates for all reports due to the Issuing Office.

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

(6) Describe how the low-income energy efficiency project will be evaluated. The program should be evaluated against the work plan developed above and the objectives, tasks,

and requirements outlined throughout this RFP. The applicant should develop a clear and concise evaluation plan that will provide for an honest and objective assessment of the successes and failures of the project. The evaluation should have both quantitative and qualitative components.

V-F Current and Prior Experience and Funding Disclosure

Current and prior experience in providing energy efficiency programs to low-income residents is important to the selection process. Proposals submitted should include:

(1) A description of the organization's experience in conducting the type of work proposed. Include current activities and activities for the previous three (3) years. Include project results.

(2) If applicant received a LIEEF award in prior years for the type of project proposed, provide a summary of project accomplishments, including number of clients served, noteworthy accomplishments, and problems encountered while carrying out grant responsibilities. Include a plan for addressing and resolving past problems.

(3) Current funding source(s) and the level of funding for the current year and the previous three (5) years.

V-G Personnel

The selected applicant(s) must be able to staff a project team that clearly possesses talent and experience in providing energy efficiency measures to low-income clients. In the narrative, identify the authorized contact person and key personnel to be involved with this project by name and title and provide a brief summary of their experience, qualifications, and the work to be performed.

If other organizations will be playing a role in the proposed project in coordination with this grant, provide sufficient background information on them in order to give the Issuing Office a reasonable understanding of their qualifications.

Include a detailed organizational chart including names and titles of all individuals that will contribute to the project.

V-H Budget

To enable the Issuing Office to evaluate all project costs, applicants shall submit a proposed budget and a corresponding separate budget narrative. The budget must follow the format outlined in Appendix A. The budget narrative must identify the budget line item and number, provide a detailed description for each line, and include individual unit prices.

(1) **Budget Changes** – Changes in the budget of less than 5% of the total line item amount do not require prior written approval, but selected applicant(s) must provide notice to the Grant Administrator. The allowable transfer should be calculated as 5% of the smaller total line item the funds are being transferred between. Selected applicant(s) are allowed a single 5% reallocation.

Changes in the budget equal to or greater than 5% of the total line item amount will be allowed only upon prior review and written approval by the Grant Administrator and the Department. A formal grant amendment must be signed by both the grantor and grantee.

(2) **Disallowed Costs** – disallowed costs include but are not limited to the following: sick pay, vacation pay, holiday pay, bonuses, overtime, tuition reimbursement/remission, vehicle allowance, car rental, seminars, conferences, meetings, subscriptions, dues, and memberships.

The proposed budget shall display five (5) headings identified as the: Line Item, Budget Category, MPSC Share, Cost Share, and Total. The budget line items that need to be included, at a minimum, are listed below. The budget should reflect the best estimate of actual costs. Refer to the budget example in Appendix A.

(3) **Personnel** – include the name and job title for each staff position to be paid for by the grant. Time sheets and payroll registers must be submitted and hours worked must be grant related.

Fringe benefits may not exceed 33% ($\frac{1}{3}$) of the employee's salary. Allowable benefits include: health, dental, and optical insurance, employer-paid Social Security and Medicare tax, Michigan and Federal unemployment tax, and other miscellaneous fringe benefits (life insurance, long- and short-term disability insurance, worker's compensation, and retirement program contributions up to 4%).

Where cost share funds are involved, the Commission must be allocated the same share of cost for each individual's salary and fringe. For example, if the Commission is allocated 80% of an individual's grant-related salary, it should also be allocated 80% of the same individual's allowable fringe benefits. The remaining 20% of this individual's salary and fringe would be cost share.

The budget narrative should include a description of the work to be performed by each individual, the estimated hours to be worked and the estimated pay rate, the percentage of the employee's time allocated to the Commission, and any other applicable information related to the individual's performance on this grant.

Independent contractors (i.e. individuals receiving a Form 1099) should be placed under the **Contractual Services** budget category. Only employees on the selected applicant's payroll should be included in the Personnel budget category.

(4) **Partnering Organizations** – all partner expenses (personnel, supplies, travel, etc.) must be placed in this budget category and separately identified in the budget narrative. On the face of the budget, the applicant may show a single lump sum for the anticipated total payment to be made to the partnering organization(s). Partnering organization expenses that are not identified in the budget narrative may be disallowed.

Organizations identified as partners must provide letters of commitment. The letter(s) should accompany the proposal submitted in response to this RFP.

(5) **Supplies, Materials, & Equipment** – specify item(s) and cost. The budget narrative should include the anticipated cost of each item, a detailed explanation of the item's purpose, and how it relates to the project being funded. Be as detailed as possible.

(6) **Contractual Services** – must be competitively bid. Individuals that are independent contractors (Form 1099) must be placed under **Contractual Services**. The services provided by the independent contractor must be competitively bid unless a contract or other documentation showing an existing relationship prior to the beginning of the grant is provided by the selected applicant(s). The existing relationship must have been competitively bid; the selected applicant may be required to provide the competitive bid documentation.

Selected applicant(s) assumes responsibility to select subcontractors on a competitive basis. Bids should be solicited from non-affiliated companies. A minimum of three (3) bids must be solicited and proposals must include, at a minimum: (1) name of selected applicant(s), grant number, and grant period; and (2) the type, number, and description of projects as described in the proposal.

Selected applicant(s) must provide the Grant Administrator with the solicitation, list of vendor responses (including amounts), and name of the selected vendor. Selected applicant(s) must maintain bids on file at their place of business according to Section II-B: Record Retention. The Grant Administrator will reserve the right to request a copy of all bids for services that are competitively bid.

The selected applicant(s) must award the project to the lowest bid unless the Grant Administrator has given prior written approval for selection of a higher bid. Selected applicant(s) must provide a written justification for the selection of a higher bid. When awarding subcontracts, the selected applicant(s) shall ensure that preference is given to products manufactured in or services offered by Michigan-based firms.

(7) **Travel** – The State will reimburse for mileage, lodging, and meals. See Appendix B for current State travel rates. Meals and lodging must be supported by itemized, legible receipts and reasons for travel. Mileage must be supported by travel logs with beginning and ending addresses, mileage total, and reason for travel. Out-of-state travel must be directly related to the grant project and approved by the Grant Administrator prior to travel. Travel expenses listed in the travel budget category are strictly for employees of the applicant. Per diem payments and alcoholic beverage reimbursements are not allowed.

(8) **Other Expenses** – specify item(s) and cost. Other expenses represent costs that are not appropriately categorized under any other budget category. The budget narrative should include the anticipated cost of each item, a detailed explanation of the item's purpose, and how it relates to the project being funded. Be as detailed as possible.

(9) **Indirect Costs** – indirect costs are costs not directly or specifically related to the grant program. Indirect costs are costs of administering the organization and must be spread over a number of products, services, or grant programs proportionately. Examples include office supplies, utilities, rent, maintenance and repair, insurance, accounting and bookkeeping services, and legal services. Non-cash expenses like depreciation, amortization, and depletion are not allowable indirect costs under this grant.

Selected applicant(s) will be reimbursed for its proportional share of indirect costs. This means the Commission should be allocated a portion of the selected applicant's indirect costs and **not** 100% of the organization's total indirect cost.

Indirect costs may only be allocated to the Commission's share of expenses. Cost share indirect expenses should not be reflected on the budget.

Indirect costs should be displayed on the face of the budget on a single line item and the indirect rate should be rounded to four (4) decimal places. The budget narrative should contain a list of indirect costs, how the selected applicant(s) determined its indirect costs, and the percentage rate calculation for reimbursable indirect costs.

The total amount of indirect costs may not exceed 15% of the grant award.

(10) Each budget category should have a subtotal displaying the total anticipated amount to be expended, and the budget should include a subtotal for total direct project costs and a sum of total project costs.

(11) After grants are awarded by the Commission, modifications of proposals and budgets may be necessary. If the Commission does not award the total amount requested in the original proposal, selected applicant(s) will be required to submit a revised proposal and budget for the purpose of entering into a Grant Agreement. New line items to the revised budget are not allowed.

(12) The documentation requirements for cost sharing expenses are identical to the documentation requirements for expenses made using LIEEF funding. Applicants should keep this documentation requirement in mind when committing realistic cost sharing expenses. A selected applicant's inability to provide sufficient documentation may cause the Commission to disallow the expense.

(13) Cost sharing (i.e. matched funding) is monetary support provided by selected applicant(s) or its partners to supplement funds provided by the LIEEF. Cost sharing represents expenses – or portions of expenses – the selected applicant or its partners pay using their own financial resources. Cost sharing amounts must be supported by a letter of commitment from the party potentially providing funding.

(14) In-kind contributions represent non-cash support provided by the selected applicant or an outside party. These contributions can include volunteer hours worked, donated equipment, donated workspace, etc.

(15) 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. Failure to do so may render the selected applicant ineligible for future grant awards that may be available from the LIEEF.

(16) If the entire State share of the grant award is spent but the entire cost share committed to the grant is not spent, the reimbursable amount of the grant award may be proportionately reduced and selected applicant(s) will be responsible for returning the reimbursed overage amount to the Commission if payment has previously been made.

(17) 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.

(18) Selected applicant(s) may not commingle grant award funds with current or future grant funds received from the LIEEF. Grants from each funding source must be managed, reported, and accounted for separately.

V-I Additional Information and Comments

Include in this section any other information that is believed to be pertinent but not specifically requested elsewhere in this RFP.

V-J Certification of Proposal

Please sign the proposal and include the following language:

I certify that all information contained in the proposal is true to the best of my knowledge and belief, and that the organization is in compliance and agreement with all sections of the Request for Proposal.

Certified by: _____
Authorized Signatory and Title
Name of Organization

PART VI: SELECTION CRITERIA

All proposals received shall be subject to an evaluation by the Issuing Office. The evaluation will be conducted to select an organization to perform the proposed grant project within the established timeline.

All proposals will receive an initial screening to ensure that the eligibility criteria are met. Proposals failing to meet the eligibility requirements described in Section I-B will be rejected automatically. Proposals meeting the eligibility requirements will be evaluated according to the selection criteria below.

Total points equal 100.

1. General (10 points)

- (a) Are the name of the organization and federal ID number provided? (3 points)
- (b) Did applicant follow the format identified in Part V: Information Requested from Applicant? (4 points)
- (c) Is an authorized negotiator identified and contact information provided? (3 points)

2. Experience of organization and project team (20 points):

- (a) Does the applicant have an existing structure for performing low-income energy efficiency projects? (8 points)
- (b) Does the applicant possess access to low-income clients? (4 points)
- (c) Does the applicant appear to be financially stable based on information provided in response to Sections V-D: Management Summary and V-F: Current and Prior Experience Disclosure and Funding Disclosure? (8 points)

3. Management summary (15 points):

- (a) Is a Project Manager identified? (5 points)
- (b) Is an individual responsible for financial management and reporting identified? (5 points)
- (c) Does the applicant provide a summary of how the proposed project will be monitored to ensure funds are used for the intended purpose, project milestones and timelines are met, and quality assurance standards are followed? (5 points)

4. Work plan (40 points):

- (a) Are the applicant's eligibility guidelines congruent with the requirements outlined in Appendix C to this RFP? (10 points)

- (b) Statewide coordination and geographic area covered (8 points). Points will be awarded based on number of counties served as follows:
- Statewide = 8 points
 - 70-82 = 7 points
 - 45-69 = 6 points
 - 30-44 = 5 points
 - 11-29 = 4 points
 - 6-10 = 3 points
 - 2-5 = 2 points
 - 1 = 1 point
- (c) Is the plan outlined in V-E: Work Plan detailed, concise, and compatible with the objectives and tasks outlined in this RFP? (12 points)
- (d) Does the organization coordinate its energy efficiency program with organizations that provide energy assistance to low-income customers confronted with energy shut-offs? (5 points)
- (e) Does the plan include a method for evaluating the project? (5 points)

5. Budget (15 points):

- (a) Is a budget provided that includes reasonable and detailed budget line items as requested (5 points)?
- (b) Is a budget narrative provided that includes reasonable and detailed explanations for the corresponding budget lines (5 points)?
- (c) Ability to minimize administrative and overhead costs (5 points).

APPENDIX A

Applicant's Name
BUDGET

Line Item	Budget Category	MPSC Share	Cost Share	TOTAL
1	PERSONNEL			
2	<i>Salary</i>			
3	Employee 1 (Job Title 1)	0	0	0
4	Employee 2 (Job Title 2)	0	0	0
5	<i>Total Salary</i>	<u>0</u>	<u>0</u>	<u>0</u>
6	<i>Fringe Benefits</i>			
7	Employee 1 (Job Title 1)	0	0	0
8	Employee 2 (Job Title 2)	0	0	0
9	<i>Total Fringe Benefits</i>	<u>0</u>	<u>0</u>	<u>0</u>
10	Total Personnel	<u>0</u>	<u>0</u>	<u>0</u>
11	PARTNERING ORGANIZATIONS			
12		0	0	0
13	Total Partnering Organizations	<u>0</u>	<u>0</u>	<u>0</u>
14	SUPPLIES, MATERIALS, AND EQUIPMENT			
15		0	0	0
16	Total Supplies, Materials, & Equipment	<u>0</u>	<u>0</u>	<u>0</u>
17	CONTRACTUAL SERVICES			
18		0	0	0
19	Total Contractual Services	<u>0</u>	<u>0</u>	<u>0</u>
20	TRAVEL			
21		0	0	0
22	Total Travel	<u>0</u>	<u>0</u>	<u>0</u>
23	OTHER EXPENSES			
24		0	0	0
25	Total Other Expenses	<u>0</u>	<u>0</u>	<u>0</u>
26	Total Direct Cost	0	0	0
27	Indirect Cost (MPSC Rate: 0.0000)	0	0	0
28	Total Project Cost	<u>0</u>	<u>0</u>	<u>0</u>
29	Percentages	<u>0.00%</u>	<u>0.00%</u>	<u>0.00%</u>

APPENDIX B

DEPARTMENT OF TECHNOLOGY MANAGEMENT & BUDGET,
VEHICLE AND TRAVEL SERVICES (VTS)
SCHEDULE OF TRAVEL RATES FOR CLASSIFIED and UNCLASSIFIED EMPLOYEES
EFFECTIVE: October 1, 2010

MICHIGAN SELECT CITIES *

Meals and Lodging	
Lodging**	\$65.00
Breakfast	8.75
Lunch	8.75
Dinner	21.00

IN-STATE ALL OTHER

Meals and Lodging	
Lodging **	\$65.00
Breakfast	7.25
Lunch	7.25
Dinner	16.50

Group Meetings

Group Lunch	10.25
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OUT-OF-STATE SELECT CITIES *

Meals and Lodging	
Lodging **	Contact Conlin Travel
Breakfast	11.00
Lunch	11.00
Dinner	22.00

OUT-OF-STATE ALL OTHER

Meals and Lodging	
Lodging **	Contact Conlin Travel
Breakfast	8.75
Lunch	8.75
Dinner	20.50

Incidental Costs Per Day (with paid overnight stay)	\$2.00
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Mileage Rates

Standard Rate (State's Mid-Sized Car Cost)	\$0.365 per mile
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* See select cities listing.

** Lodging available nightly at State rate, or call Conlin Travel 877-654-2179

APPENDIX C

ELIGIBILITY VERIFICATION REQUIREMENTS

Agencies (grantees) **MUST** keep copies of documents used to verify identity, residency, and income. The following is a list of the minimum information each agency (grantee) must collect, verify, copy, and retain for each low-income client served.

ALL APPLICANTS

Agency (grantee) Information

1. Date of verification
2. Name of agency (grantee) representative
3. Agency (grantee) representative signature and date

Applicant Information

1. Full Name
2. Social Security Number³
3. Address
4. City and Zip Code
5. County
6. Birth date

LOW-INCOME ENERGY ASSISTANCE

Applicant Questionnaire

1. Household residents:
 - a. # Children (< 18)
 - b. # Adults (18 – 61)
 - c. # Seniors (> 62)
2. Total Household income:

Total household income is the summation of the income of each member of the household; income must be verified using third party documentation, which may include, but is not limited to:

Wages (W-2); Federal tax forms (1040, 1040EZ, etc.); Michigan state tax forms (MI-1040, etc.); unemployment statements/letters; social security statements/letters; pension statements/letters; workman's compensation statements/letters; alimony or spousal support statements/letters; disability statements/letters; interest, annuities, or dividends statements/letters
3. Is the client's income at or below the applicable federal poverty guideline (e.g. 250% of poverty)?
4. Was the client prescreened by DHS?

Keep a copy of the decision letter from DHS.
5. Has the client received assistance and/or weatherization services from the agency (grantee) in the past?
6. Has the client received assistance and/or weatherization services from any agency in last 12 months?

If yes to either of the above questions, document information for the prior services, including the date, assist amount (if applicable), utility (if applicable), upgrades performed (if applicable), and agency.

³ If social security numbers are not used as a way to document and verify identity, agencies (grantees) must provide written documentation to the State detailing the alternative method for verifying identity. Client social security numbers must **not** be provided to the State.

7. Reasons for assistance, which may include, but are not limited to:
 - a. Low-income and not SER eligible
 - b. DHS/other agency cannot pay the entire bill
 - c. Emergency need/shut-off notice (must retain copy/documentation)
 - d. Job loss
 - e. Medical hardship
 - f. Other (needs explanation)
8. Document the utility name, account number, and amount to be paid for EACH PAYMENT.
Assistance payments must be made directly to the utility or deliverable fuel provider.
9. Client signature and date

Furthermore, when assistance payments are made for deliverable fuels, agencies (grantees) must keep record of the metered delivery notification that documents the amount of deliverable fuel provided. This documentation should also include the amount of the deliverable fuel already on hand to show need.

LOW-INCOME ENERGY EFFICIENCY/WEATHERIZATION

Applicant Questionnaire

1. Household residents:
 - a. # Children (< 18)
 - b. # Adults (18 – 61)
 - c. # Seniors (> 62)
2. Total Household income:
Total household income is the summation of the income of each member of the household; income must be verified using third party documentation, which may include, but is not limited to:
Wages (W-2); Federal tax forms (1040, 1040EZ, etc.); Michigan state tax forms (MI-1040, etc.); unemployment statements/letters; social security statements/letters; pension statements/letters; workman's compensation statements/letters; alimony or spousal support statements/letters; disability statements/letters; interest, annuities, or dividends statements/letters
3. Is the client's income at or below the applicable federal poverty guideline (e.g. 250% of poverty)?
4. Was the client prescreened by DHS?
Keep a copy of the decision letter from DHS.
5. Has the client received weatherization and/or assistance services from the agency (grantee) in the past?
6. Has the client received weatherization and/or assistance services from any agency in last 12 months?
If yes to either of the above questions, document information for the prior services, including the date, assist amount (if applicable), utility (if applicable), upgrades performed (if applicable), and agency.
7. Reasons for weatherization with explanation.
8. Client signature and date

Furthermore, please be advised that grantees will be required to maintain a record of all upgrades and/or repairs performed using grant funds. The record shall contain separate fields for the street address, city, state, zip code, contractor name, date of upgrade(s) and/or repair(s), dollar amount of upgrade(s) and/or repair(s), and type upgrade(s) and/or repair(s) performed. The grant administrator will provide a MS Excel spreadsheet to track these transactions.