

**Request for Proposals (RFP)
for Electric Vehicle Manufacturers and Dealers
for the Intermountain Drives Electric Program**

**Sponsored by Intermountain Healthcare
Administered by Utah Clean Energy**

August 7, 2017

This Request for Proposals is being distributed by Utah Clean Energy

Contact:

Please direct all questions and communications to
ev@utahcleanenergy.org

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1. Introduction

The purpose of this Request for Proposals (RFP) is to request proposals from dealerships or manufacturers for the sale or lease of new or used battery electric vehicles or plug-in hybrid electric vehicles (“electric vehicles” or “EVs”) at discounted prices for Intermountain Healthcare employees. The intent is to select one or more dealerships or manufacturers to offer qualifying electric vehicles for participation in this initiative.

2. Background.

The Intermountain Drives Electric Program (or “Program”) facilitates a discounted rate for battery electric vehicles or plug-in hybrid electric vehicles. Utah Clean Energy is requesting proposals from dealerships who are interested in offering a discount to individuals to purchase or lease an EV. The Program’s objective is to help Intermountain Healthcare employees to purchase or lease EVs at a lower cost, through a simplified process, and to reduce the criteria air pollutants and greenhouse gases associated with their vehicles. Individuals interested in taking advantage of this program will purchase EVs directly from the participating dealership(s). Utah Clean Energy and Intermountain Healthcare will not be a party to these sales or be responsible for any financial or other obligations related to the individual sales between participants and the selected dealership(s). Utah Clean Energy and Intermountain Healthcare intend to promote the Program and the EVs offered by the selected dealership(s) through education and outreach efforts targeted to Intermountain Healthcare employees, and by engaging with the local media. Respondents to this Request for Proposals should provide a discounted pricing structure for the purchase or lease of qualifying EVs to individuals who choose to participate in the Program.

3. Submittal Instructions

Questions about this Request for Proposals can be submitted to ev@utahcleanenergy.org by 5:00 PM on August 21. Responses to questions will be made available by 5:00 PM on August 23. To maintain the fairness and integrity of the selection process, proposals must conform to the requirements, including structure, of this RFP. Communications with Utah Clean Energy or Intermountain Healthcare for the purpose of influencing the outcome of this RFP may be cause for disqualification from further consideration.

Proposals are due by 5:00 p.m. Mountain Daylight Time Friday, September 8, 2017.

Proposals should be submitted as PDF files electronically via email to ev@utahcleanenergy.org with the subject line “Response to Drive Electric Program RFP”, or proposals may be submitted via the online form found at <http://utahev.org/request-for-proposals>. Proposals received after this deadline will be late and ineligible for consideration. All information submitted will remain confidential.

Utah Clean Energy may select one or more dealerships based on initial proposals received without discussion of such proposals with dealerships. However, Utah Clean Energy may require an interview with a dealership to supplement their written proposal. These presentations will be scheduled, if required, by Utah Clean Energy after proposals are received and prior to the selection of a dealership. See Appendix A for timeline.

Each proposal should be submitted with the most favorable price and service available. However, at the option of Utah Clean Energy, a Best and Final Offer may be requested.

Upon completion of the evaluation process, Utah Clean Energy may select one or more dealerships to provide services for the Program. Selected dealership(s) will be asked to complete a Memorandum of Understanding (MOU) with Utah Clean Energy.

4. Important Dates.

Request for Proposals released	August 7, 2017
Questions about Request for Proposals due	August 21, 2017
Responses to questions released	August 23, 2017
Proposals due	September 8, 2017
Potential applicant interviews	September 13, 2017
Selected dealership(s) notified	September 15, 2017
Program Launch	October 2, 2017
Informational Workshop	Oct./Nov., 2017
Informational Workshop	Oct./Nov., 2017
Informational Workshop	Oct./Nov., 2017
Program ends	November 11, 2017

5. Scope of Work Overview

The purpose of the Drive Electric Program is to facilitate a dealership discount for electric vehicle purchases or leases for Program participants. The Program sponsor, Intermountain Healthcare, and the program administrator, Utah Clean Energy, will promote the Program through community outreach, educational events, and partnerships with local community organizations. Utah Clean Energy will be responsible for program administration, including managing outreach and educational activities and coordination among the selected dealership(s) and Program participants. **All contracts and financial negotiations and obligations will be between the selected dealership(s) and the Program participants. Neither Intermountain Healthcare nor Utah Clean Energy shall be parties to this contract and will have no responsibility or liability under this contract.**

The selected dealership(s) will provide discounted prices for qualifying EVs to Program participants. The selected dealership(s) will complete the sale or lease of EVs for Program participants in accordance with the scope of work outlined below. Individuals who wish to participate in the Program will purchase vehicles from the selected dealership(s). Utah Clean Energy reserves the option to select one or more dealerships for participation in this program.

Based on the results of similar programs in Utah and in other states, Utah Clean Energy estimates approximately 75 vehicles may be sold or leased during this program. However, the number of sales and leases during the project is dependent on interest and not guaranteed by Intermountain Healthcare or Utah Clean Energy.

This discount program will be offered to Intermountain Healthcare's approximately 37,000 employees. The number of participants is unknown and not guaranteed by Intermountain Healthcare or Utah Clean Energy.

6. Participant Enrollment & Education

Interested participants will be asked to complete an Enrollment Form on the Program website (www.UtahEV.org). Once enrolled, participants will be referred to the selected dealership(s) and instructed to schedule an appointment with their preferred dealership(s).

The selected dealership(s) will provide a quote for the sale or lease of an EV for each program participant that is aligned with the published discounted price. Each participant who purchases an EV must sign a contract with the dealership that reflects the pricing and other provisions applicable to the Program.

Utah Clean Energy and the selected dealership(s) will coordinate regularly to track the status of enrolled participants throughout the enrollment and education period.

Between the public launch of the Program on October 2 and the close of the enrollment period on November 11, Utah Clean Energy will:

- Require that interested participants complete an Enrollment Form and provide their contact information. Selected dealership(s) may suggest additional questions to be included on this form
- Supply enrolled participants with a confirmation email containing a discount code, contact information for participating dealership(s), and instructions about how to schedule an appointment with the dealership(s) of their choice
- Host workshops and other outreach activities to educate participants about EVs and promote the Program
- Field calls from participants about the Program to answer questions or refer individuals to the selected dealership(s) for more information, as appropriate
- Develop and distribute informational collateral materials
- Promote the Program to the targeted audience of Intermountain Healthcare employees
- Manage a website to promote the Program and maintain a social media presence
- Conduct media outreach
- Serve as the point of contact for inquiries about the Program

The selected dealership(s) will:

- Coordinate with participants to schedule dealership visits
- Provide contact information for a designated EV specialist who is informed about the specific EVs sold at the dealership and will serve as the first point of contact for interested participants
- Attend workshops to provide information about the EVs offered through the program, and upon request, have EV models available at the workshops or other events for showcase. Workshops are currently scheduled for TBD, TBD and TBD
- Attend other outreach events as requested
- Participate in media events and interviews as requested
- Provide feedback on the Enrollment Form questions

- Provide weekly status updates to Utah Clean Energy reporting the number of dealership inquiries, number of dealership visits, number of vehicles sold or leased, and any relevant issues, challenges, and/or delays
- Communicate regularly with Utah Clean Energy until all sales and leases are finalized
- Participate in an exit interview and provide feedback on the Program

7. Project Completion and Assessment

After the end of the program, the selected dealership(s) will report on all purchases and leases made through the program. Utah Clean Energy will conduct an exit interview with participating dealership(s) and a follow up survey of all program participants.

8. Proposal Requirements

This section outlines the minimum requirements for an proposal to be considered complete. Interested applicants should complete Exhibits A, B and C to respond to each of the following requirements:

A. Qualifications and Expertise of Staff (see Exhibit A)

Please provide the names, titles, and years of relevant experience of key staff that will be assigned to the program. (As outlined in Exhibit A.) Selected dealership(s) shall notify Utah Clean Energy of any changes to key personnel during the program timeline.

B. Minimum Inventory Requirements (see Exhibit A)

All applicants must adhere to the following minimum qualifications; any applicants not meeting minimum qualifications will not be considered. The applicant's submission should address the following components:

- (a) Applicants must have at least one of each EV model available for test drive at the dealership for the duration of the program. Please confirm that you will have an EV available for test drive.
- (b) Applicants must have at least five of each EV model available at the dealership during the program. Please specify the minimum number of proposed vehicles you expect to be available at the dealership during the program.
- (c) If inventory is not available onsite and additional vehicles need to be ordered from outside of your dealership, please describe the timeline for procuring additional inventory (both locally and out-of-state), and any additional costs associated with placing an order.

C. Demonstrated Ability to Meet Scope of Work (See Exhibits B & C)

The dealership(s) submission should address the following components:

- (a) Proposed vehicle(s), including year(s), make(s), and model(s) to be included in the program, including total number of each type of vehicle that is expected to be available during the program. See Exhibits B and C.
- (b) Designated point of contact for EV sales at the dealership. See Exhibit B.
- (c) Detailed response to Customer Service Flowchart. See Exhibit B.

D. Cost (see Exhibits B & C)

Please complete Exhibits B with information about the vehicle discounts you are offering. Provide information about the current base model cost (lease and purchase) for all EVs you propose to include in the program, and the discount amount, as a percentage or as a total dollar amount, that the dealership will offer to participants in the program for both purchases and leases. The discount amount *should not* include any federal tax credits for which the customer may qualify in the case of a sale. However, any dealer or manufacturer tax credits *should* be taken into account as part of the lease pricing. Please also indicate the time period that the discount will be available; preference will be given to respondents able to offer a consistent discount over the entire program period (October 2 through November 11, 2017).

Program discounts must be made available to all eligible program participants.

For Exhibit B please indicate any type of financing or leasing you will make available to eligible participants. List any financing options that you have available for participants, as well as the criteria for accessing those financing options. Please be specific about ALL terms, including, but not limited to, interest rates, lease terms, credit qualifications, down payment requirements, etc.

Please also provide any additional incentives or benefits you are willing to make available to the program or to participants in the program.

9. Proposal Evaluation Criteria.

Utah Clean Energy intends to select one or more dealerships by utilizing the criteria listed below with their relative weights in points to evaluate proposals.

A. Qualifications and Expertise of Staff	20 Points
B. Minimum Inventory Requirements	20 Points
C. Demonstrated Ability to Meet Scope of Work	20 Points
D. Cost	40 Points

10. Evaluation Process.

All proposals in response to this Request for Proposals will be evaluated as follows:

- Utah Clean Energy will review all proposals received on time. Proposals that do not meet the minimum RFP requirements will be eliminated. **Utah Clean Energy reserves the right to disqualify any proposal that includes significant deviations or exceptions to the terms, conditions, and/or specifications in this RFP.**
- At the conclusion of this initial evaluation phase, Utah Clean Energy may request interviews with the highest scored applicant(s). **Utah Clean Energy will be the sole judge as to the overall acceptability of any proposal or to judge the individual merits of specific provisions within competing offers.**

11. Additional Information

A. Incurring Costs.

Utah Clean Energy will not be liable for any cost which dealerships may incur in connection with the preparation or presentation of their proposal(s). Proposals should be concise, straightforward, and prepared simply and economically. Expensive displays, bindings, or promotional materials are neither desired nor required. However, these instructions are not intended to limit an proposal's content or exclude any relevant or essential data therefrom.

B. Proposal Validity.

All proposals shall remain valid for a minimum of 120 calendar days after the Proposal Due Date to allow adequate time for evaluation.

C. Addendum to RFP.

In the event that it becomes necessary to revise this RFP in whole or in part, an addendum will be provided to all dealerships on record as having received this RFP.

D. Other Communications.

During the RFP process (from the date of issue through the date of dealer selection, award, or other final decision), Utah Clean Energy is the sole source of official information regarding this RFP. All other communications which are received by any representative of the dealership from other sources should be confirmed with Utah Clean Energy as being true and accurate prior to incorporating such information into their proposal. This refers to both formal and informal conversations and communications. Significant changes to the RFP will always be issued as a formal, written addendum.

E. Authorized Dealership Representatives.

Utah Clean Energy reserves the right to request a change in the individual assigned to represent the dealership if the assigned representative is not serving the needs of Utah Clean Energy in an acceptable manner. This right shall carry forward through the response period and, with the successful dealership(s), during the term of the Program.

F. Compliance.

The dealership hereby agrees to abide with all applicable federal, state, county, and city laws and regulations, and to be responsible for obtaining and/or possessing any and all permits and licenses that may be required.

G. Right to Reject.

Utah Clean Energy reserves the right to reject any or all proposals and to waive any formality or technicality in any proposal in the interest of the Program.

H. Relationship of the Parties.

In assuming and performing the obligations of any Program, Utah Clean Energy and any dealership shall each be acting as independent parties and neither shall be considered or represent itself as a joint venturer, partner, or employee of the other.

Exhibit A – Information about Applicant

Dealership Name:

Today's Date:

Primary Contact Name:

Primary Contact Phone:

Primary Contact Email:

Please describe:

a) Your ability to serve the needs of the community. For purposes of this Request for Proposals, "program area" shall include Salt Lake County, Davis County, Summit County, Utah County, Weber County and Tooele County. Please explain your experience working with residents of the geographic area of the program area and your available inventory for the program.

Answer:

b) Your plan for implementation of the Program, including sales agents made available to work with those in the program, anticipated inventory of vehicles, and expected delivery schedules for vehicles (if not available onsite).

Answer:

c) Your proposed approach to maintain high quality customer service throughout the program.

Answer:

d) Identify any possible challenges you may encounter during this process and how you plan to address them.

Answer:

e) Provide names, titles, and relevant years of experience of key staff that will be assigned to the program.

Answer:

Exhibit B – Cost Proposal Form, Discount Pricing Structure, and Project Schedule:

Applicant Firm(s):

Today's Date:

Primary Contact Name:

Primary Contact Phone:

Primary Contact Email:

Part I: Please provide pricing for each EV included in this proposal. Include additional lines as necessary.

Electric Vehicle <i>Purchase</i> Information					
Model Name	Model Year	Specific configuration(s), trim, or packages (if applicable)	Sticker Price	Discount (% or \$ amount)	Final discounted price ^[1]

^[1] Dealers providing discounted pricing agree to offer this discounted price to all participants.

Purchase price should not include any available federal tax credits.

Electric Vehicle <i>Lease</i> Information								
Model Name	Model Year	Specific configuration(s), trim, or packages (if applicable)	Sticker Price	Total out of pocket including tax, title, and licensing	Monthly Lease Payment ^[1]	Lease Term ^[2]	Mileage / year	Residual Value ^[2]

^[1] Dealers providing discounted pricing agree to offer this discounted price to all participants. Lease price should specify the customer's annual lease payment amounts, accounting for applicable Federal tax incentives.

^[2] Please include a three year lease with option to purchase vehicle at the end of the lease.

Part II: Additional benefits or discounts. Be as specific as possible and include any additional options that were not addressed above. Add additional rows as necessary. For example: Level II home charger, cashback, special financing interest rate, public charging subscription, etc.

Option	Description
<i>Example:</i> Level II Charger	<i>Example:</i> Free Level II Home Charger included with the purchase or lease of a vehicle.

Part III: Please modify this Customer Service Flowchart as needed. Dealer(s) will be responsible for following up with all program participants in addition to providing regular information to Utah Clean Energy regarding customer and project status.

Step	Expectation	Dealer Response
Initial Customer Contact	<i>Communicate with participating customer within __ days upon receiving contact referral information</i>	
Customer Visit to Dealership	<i>Specify average time to meet with a salesperson trained in BEV/PHEV vehicles, specify if appointments will be required</i>	
Presentation of Purchase Options	<i>Provide information on the estimated number of models and trim levels available for customers to test drive, how will information on options be presented, etc.</i>	
Financing Process	<i>Provide information on what financing options will be available to customers, outline lease options, requirements, etc. Describe process for financing through third party banks and credit unions.</i>	
Trade-In Protocol	<i>Provide information on how vehicle trade-ins will be handled</i>	
Purchase & Delivery	<i>Outline process for purchasing and delivery. Will vehicles be available on site, if not, estimated wait time and additional cost factor(s).</i>	

Total Number of Vehicles Purchased	Estimated vehicle availability and/or wait time
0 - 25	<i>Same day availability or estimated 1 week wait time for delivery</i>
26 - 50	
51 - 100	
100+	

Appendix – Program Timeline:

Intermountain Drives Electric Program Schedule	
Milestones	Timeline*
PHASE I: Request for Proposals	
Distribute Request for Proposals (RFP) to EV Dealers	August 7, 2017
Due Date for RFP questions for Utah Clean Energy	August 21, 2017
Utah Clean Energy responses to RFP questions	August 23, 2017
Due date for Dealers to submit proposals	September 8, 2017
Hold for potential interview(s) with applicant(s)	September 13, 2017
Selection of Dealer(s)	September 15, 2017
Negotiations with Dealer(s) and project details finalized through Memorandum of Understanding (MOU)	September 18-29, 2017
PHASE II: Program Launch & Recruitment of Participants	
Pre-launch of Drive Electric Program website	September 18, 2017
Formal launch of Drive Electric Program: Full website is published and open enrollment begins	October 2, 2017
Informational Workshop	Oct./Nov., 2017
Informational Workshop	Oct./Nov., 2017
Informational Workshop	Oct./Nov., 2017
Open enrollment closes and program ends	November 11, 2017

*All dates are subject to change at Utah Clean Energy’s discretion. In the event that the timeline is adapted, Utah Clean Energy will inform the dealer(s) of any changes to the timeline, and where necessary collaborate with the dealer(s) in adapting the timeline.