

# Table of Contents

Exhibit A - Marketing Plan - Ameresco BLK	2
Part D - Questionnaire - Ameresco	8
Part E - Signature Forms - Ameresco	32
Tabulation By Vendor_IFB#023-A_orgId_909157	40



# MRO Marketing PLAN

Association of Educational Purchasing Agencies

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# MRO Marketing Plan

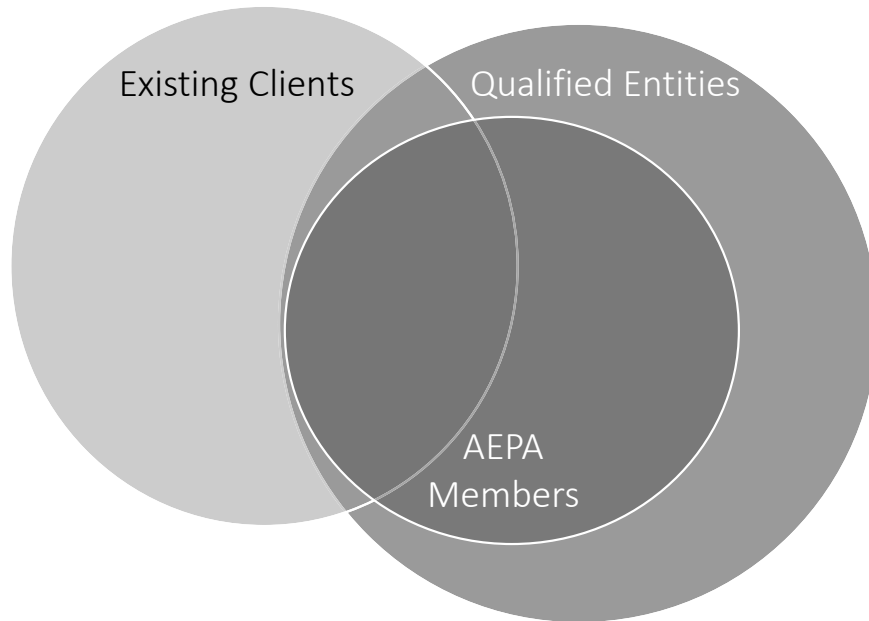
Targets (Who)	Messaging (What)	Sequencing (How)	Results (Why)
<p>Outreach campaign(s) will include:</p> <ul style="list-style-type: none"> <li>• All existing AEPA Members</li> <li>• All eligible non-members</li> <li>• Any eligible Ameresco clients</li> </ul>	<ul style="list-style-type: none"> <li>• Brainstorm interests and needs by buyer type</li> <li>• Review/Revise existing or develop new supporting content to accompany outreach</li> <li>• Include specificity and utilize multiple merge fields to customize message</li> </ul>	<ul style="list-style-type: none"> <li>• Set the stage with high-volume, low-cost outreach</li> <li>• Follow up <i>quickly</i> to maintain priority</li> <li>• Add a personal touch with a phone call and a branded direct mail piece</li> <li>• Maintain presence and keep following up over a 3-5 week period</li> </ul>	<ul style="list-style-type: none"> <li>• Use the data to inform the approach</li> <li>• Outline and define performance metrics up-front</li> <li>• Report periodically to evaluate performance vs. goal</li> <li>• Report at every stage to allow for room to tweak</li> <li>• If any leads remain in “Outreach” stage, repeat.</li> </ul>

## Success Roadmap

- Develop new projects by meeting with qualified entities
- Increase membership by enlisting new qualified entities to AEPA
- Provide best-value MRO solutions to all current and prospective AEPA members
- Fill the future project funnel with “tweeners”

# MRO Marketing Plan

## Buyer Profile Diagram



## Campaign Targets

- Source and acquire lists of Qualified Entities
- Compare to existing Member and Client lists of AEPA and Ameresco respectively
- Develop campaign lists of Qualified Entities
  - Existing Plug Smart Client and AEPA Member
  - Existing Plug Smart Client and not yet AEPA Member
  - Non-clients but existing AEPA Member
  - Non-clients and not yet AEPA Member

# MRO Marketing Plan

Ameresco Client AEPA Member	Ameresco Client	Ameresco Member	Remaining Qualified Entities
<ul style="list-style-type: none"> <li>New program through your existing membership available from Ameresco</li> <li>Want to understand MRO projects on the horizon</li> </ul>	<ul style="list-style-type: none"> <li>Introduction to AEPA with supporting documentation</li> <li>New, <i>fast, best-value delivery</i> provided through membership, available exclusively from Ameresco</li> <li>Touching base to understand MRO needs on the horizon</li> </ul>	<ul style="list-style-type: none"> <li>Reaching out on behalf of AEPA</li> <li>Introduction to Ameresco with supporting documentation</li> <li>New program through your existing membership available from Ameresco</li> <li>Want to understand MRO projects on the horizon</li> </ul>	<ul style="list-style-type: none"> <li>New, <i>fast, best-value delivery</i> provided through membership, available exclusively from Ameresco</li> <li>Introduction to AEPA and Ameresco with supporting documentation</li> <li>Want to understand MRO projects on the horizon</li> </ul>

## Campaign Messaging

Each buyer profile requires a custom-tailored message

- Primary objective is to **set up discovery meetings to create projects**
- Secondary objective is to **evangelize program strengths**:
  - NEW* – Pique interest to find out more
  - FAST* – Drive advantage of skipping administrative hurdles of traditional public procurement methods
  - BEST-VALUE* – Pre-negotiated pricing with well-qualified vendors provides peace-of-mind for district when pursuing capital improvement projects.
- Tertiary objective is to (at least) **introduce all qualified entities to AEPA and Ameresco.**

# MRO Marketing Plan

## Campaign Sequencing

### Example Sequence



Above is an example sequence that we would execute over the course of about a month (including research). We have experimented with outreach frequency and sequences, and we will ultimately use that which is best fit for AEPA's message.

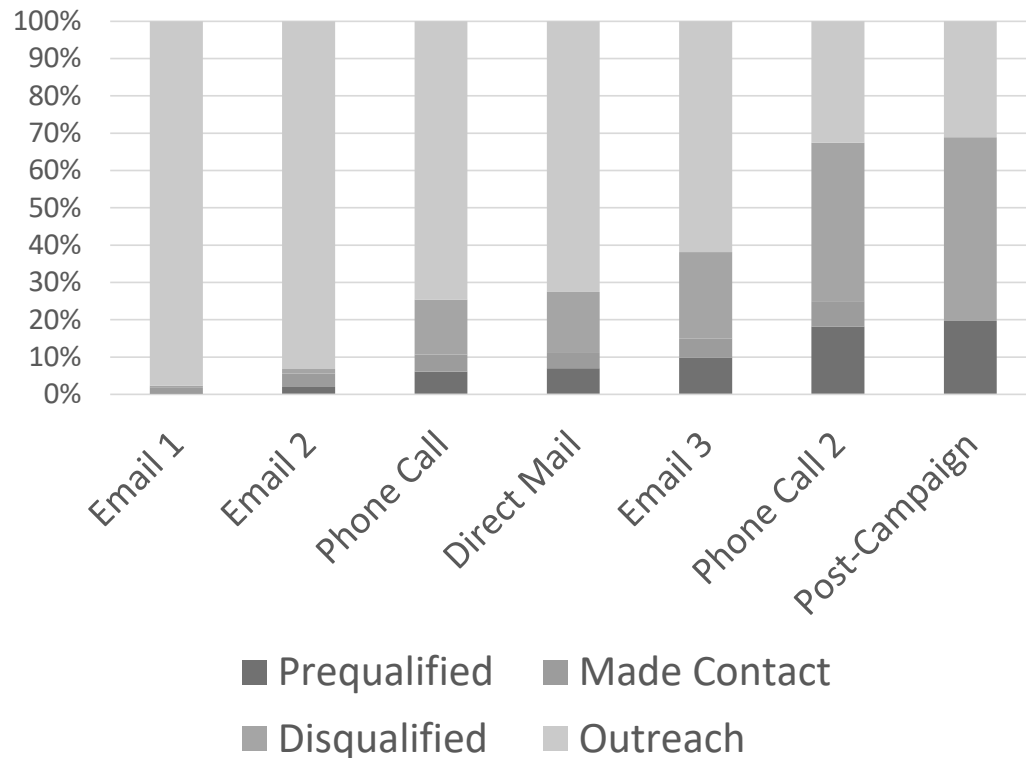
A response at any stage is pulled into a **scheduling workflow**

- First discovery meeting scheduling (Face-to-face/Zoom)
- Educate lead on program, delivery, advantages, etc.
- Qualify any upcoming project(s)
- Walk lead through AEPA membership sign-up (if not already a member)

Any not interested/opt-outs **pulled from future outreach**, but updated for reporting

# MRO Marketing Plan

## Results Model



## Campaign Results

General messaging will follow the approach outlined below. Based on this model, derived from similar campaigns, we expect a 15% conversion rate with about 20% holdout rate.

1. Set the stage, provide a brief program summary
2. Add more detail and establish the brand
3. Point to the first couple as reference with a personal touch
4. Add content for stubborn targets
5. Check in on campaign to-date
6. Final outreach effort to convert remaining targets
7. Clear any in limbo and document remaining holdouts.

## Part D - Questionnaire

AEPA #023-A

MAINTENANCE, REPAIR AND OPERATION (MRO)

### Instructions

This questionnaire contains forms and requests for information required by AEPA for vendor evaluation for responsiveness and responsibility.

To submit the required forms, follow these steps:

1. Read the documents in their entirety.
2. Respondents must use Part D – Questionnaire to its capacity. Attached exhibits and/or supplemental information should be included only when requested.
3. Complete all questions.
4. Save all pages in the correct order to a single PDF format titled ***“Part D – Questionnaire – Name of Company”***.
5. Submit Part D, along with other required documents in Public Purchase.

The following sections will need to be completed prior to submission and submitted as one single PDF titled “Part D – Questionnaire – Name of Company”:

[Company Information](#)

[Service Questionnaire](#)

[Exceptions](#)

[Deviations](#)



## Company Information

<b>Name of Company:</b>	Ameresco, Inc.
<b>Company Address:</b>	111 Speen Street, #410
<b>City, State, zip code:</b>	Framingham, MA 01701
<b>Website:</b>	<a href="https://www.ameresco.com">https://www.ameresco.com</a>
<b>Contact Person:</b>	Mark Himmel
<b>Title:</b>	Director – Project Development
<b>Phone:</b>	614.935.0041
<b>Email:</b>	<a href="mailto:mhimmel@ameresco.com">mhimmel@ameresco.com</a>

## Background

**Note:** Generally, AEPA will not accept an offer from a business that is less than five (5) years old or which fails to demonstrate and/or establish a proven record of business. If the respondent has recently purchased an established business or has proof of prior success in either this business or a closely related business, provide written documentation and verification in response to the questions below. AEPA reserves the right to accept or reject newly formed companies based on information provided in this response and from its investigation of the company.

**This business is a:**      ☒ **public company**                      ☐ **privately owned company**

In what year was this business started under its present name?	2000
--	------

**Under what additional, or, former name(s) has your business operated?**

**Is this business a corporation?** No ☒ Yes. If yes, complete the following:

**Date of Incorporation:** April 25, 2000

**State of Incorporation:** Delaware

**Name of President:** George P. Sakellaris, PE

<b>Name(s) of Vice President(s):</b>	Michael T. Bakas; Nicole A. Bulgarino, PE; Peter Christakis, CEM; Leila Dillon; Bob
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Georgeoff; Doran Hole; Britta MacIntosh; Louis Maltezos

**Name of Treasurer:** Mark Chiplock

**Name of Secretary:** David J. Corrsin

Is this business a partnership?   X   No            Yes. If yes, complete the following:

**Date of Partnership:** N/A

State Founded:	N/A
----------------	-----

Type of Partnership, if applicable: N/A

**Name(s) of General Partner(s):** N/A

**Is this business individually owned?** X **No** **Yes. If yes, complete the following:**

**Date of Purchase:** N/A

Date of Filing:	2/11
State Founded:	N/A

<b>Name of Owner/Operator:</b>	N/A
--------------------------------	-----

Is this business different from those identified above?   X   No        Yes  
 If yes, describe the company's format, year and state of origin and names and titles of the principles below.

N/A

Is this business women-owned?   X   No        Yes

Is this business minority-owned?   X   No        Yes

Does this business have an Affirmative Action plan/statement?        No   X   Yes

### Business Headquarter Location

Business Address 111 Speen Street, #410

City, State, zip code Framingham, MA 01701

Phone 888.263.7372

How long at this address? 22+ years

### Business Branch Location(s)

Branch Address Please see attachments for a list of all U.S. Branch locations

City, State, zip code

*\*If more branch locations exist, insert information here or add another sheet with the above information.*

### Sales History

Provide your business's annual sales for in the United States by the various public segments.

	2020	2021	2022 YTD*
K-12 (public & private), Educational Service Agencies	\$77.6 M	\$111.9 M	\$75.6 M
Higher Education Institutions	\$53.8 M	\$42.6 M	\$11.4 M
Counties, Cities, Townships, Villages, State	\$122.3 M	\$242.4 M	\$82.2 M
Healthcare & Utilities (mix of Public and Private)	\$121.0 M	\$1,000.0 M	\$42.6 M
Other Public Sector & Non-profits	\$273.4 M	\$218.8 M	\$293.2 M
Private Sector	\$38.7 M	\$93.2 M	\$33.1 M
<b>Total</b>	<b>\$686.9 M</b>	<b>\$1,700.0 M</b>	<b>\$538.1 M</b>

**\*2022 YTD includes sales from 01.01.22 - 06.30.22**

Provide your business's annual sales for **products and services that meet this solicitation's scope of work** in the United States by the various public segments.

	2020	2021	2022 YTD*
K-12 (public & private), Educational Service Agencies	\$25.6 M	\$36.9 M	\$24.9 M
Higher Education Institutions	\$500 K	\$834 K	\$1.4 M
Counties, Cities, Townships, Villages, State	\$7.6 M	\$15.6 M	\$4.1 M
Healthcare & Utilities (mix of Public and Private)	\$80.7 M	\$83.3 M	\$39.6 M
Other Public Sector & Non-profits	\$13.6 M	\$24.6 M	\$96.2 M
Private Sector	\$16.2 M	\$31.9 M	\$7.9 M
<b>Total</b>	<b>\$144.4 M</b>	<b>\$193.2 M</b>	<b>\$174.1 M</b>

## Work Force

**Key Contacts and Providers:** Provide a list of the individuals, titles, and contact information for the individuals who will provide the following services on a national and/or local basis:

Function	Name	Title	Phone	Email
Contract Manager	Dave Zehala	VP and General Manager	614-935-7487	dzehala@ameresco.com
Sales Manager	Will Lytwyn	VP Project Development	216-402-5133	wlytwyn@ameresco.com
Customer & Support Manager	Mark Himmel	Director of Project Development	614-935-0041	mhimmel@ameresco.com
Distributors, Dealers, Installers, Sales Reps	Clint Sharp	Director of Operations	513-372-1457	csharp@ameresco.com
Consultants & Trainers	Lucas Dixon	Regional Director of Project Development	614-580-3352	ludixon@ameresco.com
Technical, Maintenance & Support Services	Dan Papay	VP Engineering	937-313-8420	dpapay@ameresco.com
Quotes, Invoicing & Payments	Gay Hauenstein	Project Accountant	614-565-6936	ghauenstein@ameresco.com
Warranty & After the Sale	Heather Jackson	Director - Service Operations	513-766-8657	hjackson@ameresco.com
Financial Manager	Colleen Lorms	Accounting Manager	614-935-1638	clorms@ameresco.com

**Sales Force:** Provide total number and location of salespersons employed by your business in the United States by completing the following: *(To insert more rows, hit the tab key from the last field in the State column.)*

# of Sales Reps	City	State	# of Sales Reps	City	State
1	Vestavia	AL	4	Milford, S. Lyon, Sparta, Waterford Twp.	MI
8	Chandler, Phoenix, Scottsdale, Tucson	AZ	5	Eden Prairie, Golden Valley	MN
12	Folsom, Kenwood, Lafayette, Los Osos, Manhattan Beach, Menlo Park, Ojai, San Diego, Sebastopol, Temecula	CA	2	St. Louis	MO
2	Aurora	CO	4	Dillon, Helena, Missoula	MT
2	Ridgefield, Wallingford	CT	2	Huntersville, Raleigh	NC
5	Capital Heights, Washington	DC	2	Meredith, New Durham	NH
4	Fort Myers, Orlando, St. Petersburg, Valrico	FL	1	Las Vegas	NV
2	Atlanta	GA	2	Newburgh, Victor	NY
2	Honolulu	HI	4	Columbus, Worthington	OH
3	Boise, Portland, Post Falls	ID	2	Portland	OR
5	Chicago	IL	2	Beaver Falls, Pittsburgh	PA
1	Indianapolis	IN	1	East Greenwich	RI
1	Lansing	KS	2	Knoxville	TN
1	Lexington	KY	10	Dallas, Houston, Magnolia, Tomball, Tyler, Whitehouse	TX
3	Baton Rouge, Marrero, Mathews	LA	3	Midlothian, Reston, Richmond	VA
17	Framingham, Marblehead, Westborough	MA	2	Renton	WA
3	Bel Air, Clinton, Columbia	MD	1	Genoa City	WI
1	Portland	ME			

**Describe** how your company will implement training and knowledge of the contract with your respective sales force. Furthermore, describe how your company plans to support and train your sales force on a national, regional, or local level and generally assist with the education of sales personnel about the resulting contract.

Ameresco keeps its sales force trained and knowledgeable about customer contracts, sales opportunities and marketing tools thru several means. We frequently conduct internal training sessions, which are recorded and made available on our intranet. Our marketing team keeps our Internal Campaign Resource web page up to date with important and helpful information on Ameresco brand position and special marketing campaigns, as well as the latest marketing tools and resources. All of these materials are shared with our sales force across the company as they become available and with new sales staff as part of their onboarding. We will use a combination of these tools to keep our sales force knowledgeable about the contract.

**What is** your company's plan, if your company were awarded the contract, to service up to 29 states. Describe if your company has a national sales force, dealer network, or distributor(s) with the ability to call on eligible agencies in the participating states in AEPA.

Drawing from 20 years of experience, Ameresco has successfully completed energy saving, environmentally responsible projects with Federal, state and local governments, healthcare and educational institutions, housing authorities, and commercial and industrial customers. With its corporate headquarters in Framingham, MA, Ameresco has more than 1,000 employees providing local expertise in the United States, Canada, and Europe. Ameresco has sales representatives in 35 states throughout the country.

## Products, Services & Solutions

Provide a description of the Products, Services & Solutions to be provided by the product category set forth in Part B - Specifications. The primary objective is for each Supplier to provide its complete product, service, and solutions offerings that fall within the scope of this solicitation so that participating agencies may order a range of products as appropriate for their needs.

Ameresco is pleased to offer AEPA Members our complete suite of Maintenance Repair & Operations (MRO) Services as well as our Design Services, Installation Services, Training Services, Warranty Services, and Support Services as needed.

**Through our manufacturer, supplier, distributor, and dealer network(s), our products can be utilized in all of the product categories set forth in Part B – Specifications.** A significant representation of pricing catalogs have been provided for many of those categories including Air Filters, Batteries and Flashlights, Electrical Repairs and Equipment, Fasteners, HVAC, Hand tools, Lighting, Material handling supplies, Plumbing, Power tools, Safety products, Security, Welders & soldering.

For this submission, our initial catalog set includes (but are not limited to) the following manufacturers:

ACI	FDI	Onicon
AEB	GE Current	Paxton
Air Monitor	Graybar	RAB Lighting
Belimo	Habegger	Reliable Controls
Computrols	IC Real Time	RIB
Cooper Lighting	KMA HVAC	Richards Electric
CRC	Leviton	Senva
Dell	Lithonia Lighting	Thermal Instruments
Dwyer	Lutron	Windy City Wire
Eaton	Niagara	Wolff Brothers
Ebtron		

In order to provide these products and solutions most effectively, Ameresco has also provided pricing for our Design Services, Installation Services, Training Services, Warranty Services, and Support Services.

## Distribution

**Describe** how your company proposes to distribute the products and services nationwide, regionally, or at the local level.

Founded in 2000, Ameresco has 1,000+ employees spanning the United States with 60+ offices providing local expertise across North America. Ameresco's highly experienced and dedicated Operations & Maintenance team delivers customized levels of service to support any facility's unique requirements. Our O&M expertise and experience includes: Asset / Plant Operations, Facility Maintenance (Scheduled & Unscheduled), Maintenance, Repair and Operations (MRO) Services, and Facility Energy Efficiency Program Delivery Services.

Ameresco assures MRO best practices through a dedicated and experienced operations support team that can be mobilized across North America to help AEPA members troubleshoot problems. As part of this partnership with AEPA, Ameresco would provide AEPA members with a dedicated support team that would serve as a single point of contact to assist members with the identification, procurement, and distribution of MRO products/materials/services in all 32 member states.

As such, AEPA members will have one dedicated support person to call nationwide who can also coordinate with our regional/local teams to work with AEPA members at their local facilities as needed. This will allow us to provide a high level of service to AEPA members helping them reduce their MRO risks, minimize lifecycle costs, better protect their assets, enhance their facility's performance, and comply with environmental and safety standards and requirements.

**Service/Support and Distribution Centers:** Provide the type (service/support or distribution) and location of centers that support the United States by completing the following: *(To insert more rows, hit the tab key from the last field in the State column.)*

Our service/support/distribution centers operate out of our branch offices. Please see attachments for a list of all U.S. Branch locations.

**Describe** the criteria and process by which your company selects and approves subcontractors, distributors, installers, and other independent services.

Potential subcontractors are required to submit a Statement of Qualifications (SOQ) permitting an assessment of their organizational structure, financial risk profile, experience and capabilities, contract practices, recent project history including safety and quality performance, and references. Successful pre-qualified bidders are selected on the basis of input from clients, ability to address the work scope, added value, innovation, safety performance, quality performance, and price. Our process of finding the subcontractors, including small business subcontractors, includes: Previous work experience with Ameresco in same geographic proximity; Utilization of local construction manager experience and knowledge; Discussion with facility personnel; SBA DSBS (Small Business Administration Dynamic Small Business Search); Announcement of proposed work scope on company website and/or industry publications

**Provide** a list of current subcontractors, distributors, installers, and other independent service providers who are contracted to perform the type of work outlined in this solicitation in the member agency states. Include, if applicable, contractor license or certificate information and the state(s) wherein they are eligible to provide services on behalf of the business.

Please see Part F.2 – Price Schedule for a list of distributors associated with this solicitation. Please see Part F.3 – Services Price Schedule for a list of other self-performed services associated with this solicitation. Also note that Ameresco is a vendor-neutral MRO services company. Ameresco support staff is able to select the technologies that most effectively achieve a client's unique goals at the lowest possible cost. Our teams can also work with AEPA members to involve local subcontractors, installers and other independent service providers that AEPA members already know, like and trust.

**If applicable**, describe your company's ability to do business with manufacturer/dealer/distribution organizations that are either small or MWBE businesses as defined by the Small Business Administration.

Ameresco is an equal opportunity employer that works collaboratively with, and routinely solicits participation from Minority, Woman and Disabled Businesses (M/W/DSBEs). As part of our approach to involving and working with M/W/DSBEs firms, Ameresco will organize job conferences, conduct out-reach events through local minority chambers of commerce, and/or advertise/ market work opportunities through municipal data bases of local M/W/DSBE firms.

**If applicable**, describe other ways your company can be sensitive to a participating agencies desire to utilize local and/or MWBE companies, such as the number of local employees and offices with a geographic region, companies your firm uses that may be local (i.e. delivery company), your own company's diversity of owner employees, etc.

As we lead the quest to change the world as the trusted sustainability partner, we welcome, support, and celebrate unique ways of thinking. Ameresco is proud to be an equal opportunity workplace and an Affirmative Action employer. Ameresco is fully committed to Equal Employment Opportunity and to attracting, retaining, developing and promoting the most qualified employees without regard to their race, gender, color, religion, sexual orientation, gender identity, national origin, age, physical or mental disability, citizenship status, veteran status, or any other characteristic protected by applicable law. We are dedicated to providing a work environment free from discrimination and harassment, and where employees are treated with respect and dignity.

**If applicable**, provide details on any products or services being offered by your company where the manufacturer or service provider is either a small or MWBE business as defined by the Small Business Administration. Provide product/service name, company name and small/MWBE designation.

Ameresco carries a very strong track record of diversity and inclusion programs in its past completed contracts. Specific Companies Worked with: Lighting & Electrical / LSI Industries, Inc. / WBE  
The following are some examples that demonstrate our success and experience incorporating diversity and inclusion programs into our projects.

Project	MBE/WBE Achieved
Chicago Housing Authority	56%
Metropolitan Pier & Exposition Authority, Chicago	48%
Akron Metro Housing Authority Ph-4, OH	44%
City of Chicago (Streetlights)	42%
Chicago Park District	30%
State of Illinois	25%

## Marketing

**Key Marketing Contact(s):** List the name(s), title(s) and contact information of the business's key national and regional marketing office(s). *To insert more rows, hit the tab key from the last field in the Email column.*

Name	Title	Phone	Email
Leila Dillon	Sr. VP – Corporate Marketing & Communications	508.661.2264	ldillon@ameresco.com
Jenna Williams	Director – Marketing & Communications	508.598.3097	jwilliams@ameresco.com
Rhea Hickok	Director – Marketing & Public Relations	502.420.1971	rhickok@ameresco.com
Kate Cronin	Manager - Marketing	508.661.2288	kcronin@ameresco.com



**Describe** how this business marketed its products and services to schools, nonprofit organizations, and other public sector audiences in Fiscal Year 2021– 2022 (July 1 – June 30). List all conventions, conferences, and other events at which this company exhibited.

Ameresco is an independent cleantech integrator, providing services to several industries including higher education and healthcare institutions, K-12 districts, local governments, transportation authorities, and more. Our sales and marketing approach is to offer customers customized and comprehensive energy efficiency solutions tailored to meet their economic, operational, and technical needs. We market our solutions and services to identify project opportunities through a wider range of marketing channels, including but not limited to:

- **Website, digital campaigns, and inbound marketing** – Digital marketing is a key part of marketing efforts at Ameresco, as online information consumption is the main way that buyers research and consume information early in the marketing funnel. The Ameresco website serves as a lead generation channel through gated content and resources like on-demand webinars and white papers, sharing Ameresco’s deep experience through peer success stories, and relevant news and insights.
- **Digital advertising and paid sponsorships** – This is a core component of Ameresco’s marketing programs as a means to further extend messaging reach to prospective customer audiences. Digital advertising and sponsorship channels include Google pay-per-click in addition to adverts and sponsorships via industry publications such as Smart Energy Decisions, Industry Dive family of publications, American Society for Health Care Engineering (ASHE), Association for the Advancement of Sustainability in Higher Education (AASHE), International City/County Management Association (ICMA), Environment + Energy Leader, among others.
- **Industry association memberships** – Ameresco participates in several industry organizations to extend marketing reach via trusted third-party associations. National memberships for FY21-22 include: American Association of Airport Executives (AAAE); National Association of College and University Business Officers (NACUBO); Association of Physical Plant Administrators (APPA); Association for the Advancement of Sustainability in Higher Education (AASHE); US Green Building Council (USGBC); Alliance to Save Energy; National Association of Housing and Redevelopment Authority (NAHRO); Public Housing Authorities Directors Association (PHADA); American Clean Power Association (ACP); and Solar Energy Industries Association (SEIA).
- **Industry conferences and events** - Ameresco’s participation at industry events include exhibiting, sponsorships, and speaking slots at events during the FY21-22 including: IDEA Campus Energy, E+E Leader Energy Management Summits, Smart Energy Decision Forums and Summits, Smart Cities Connect Annual Conferences, ASHE Annual Conference, NACUBO Annual Conferences, ICMA Annual Conference, P3 Higher Education Summit, NAHRO Annual Conference, PHADA Conferences, AEG Stakeholder Challenges, and numerous regional-chapter conferences for these organizations.
- **Social media** – Ameresco uses LinkedIn and Twitter social media platforms to reach more tech-savvy buyers and industry networks. Our feeds focus on sharing industry current events, thought leadership and media coverage, customer news and announcements, and a wealth of resources to help buyers get started in their clean energy journey.
- **Outreach telemarketing campaigns** – As part of regional outreach, sales and marketing professionals across the Ameresco team conduct outreach and telemarketing campaigns specific prospect segments to reach buyers with a targeted message or offer.
- Additionally, Ameresco secures business opportunities through **word-of-mouth and peer referrals, repeat business from existing customers, competitive procurement bids and requests for proposals (“RFPS”)**.

**Describe** how your company will market the resulting contract to eligible Member Agencies. Describe how your company differentiates the new agreement from existing contracts that your company may hold today. Please be specific and detailed in your response.

Ameresco will work with AEPA leadership and create a singular vision for this MRO contract's marketing strategy. In order to develop the most effective messaging, we will divide targets into four distinct categories: (i) existing Ameresco client and AEPA member; (ii) existing Ameresco client, but not yet AEPA member; (iii) non-Ameresco Clients but existing AEPA member; (iv) non-Ameresco clients and not yet AEPA members.

In order to reach eligible Member Agencies, both that are and are not yet Ameresco clients, we will pair our outreach messaging with information about AEPA. With "cold" non-member, non-client prospects, we will develop a multistep campaign to ensure proper penetration is achieved including methods such as email, phone, direct mail etc. Each campaign includes research and reporting stages so adjustments could be made to maximize efficiency. See example campaign sequence below.

### Example Sequence



A response at any stage will be pulled into a scheduling workflow:

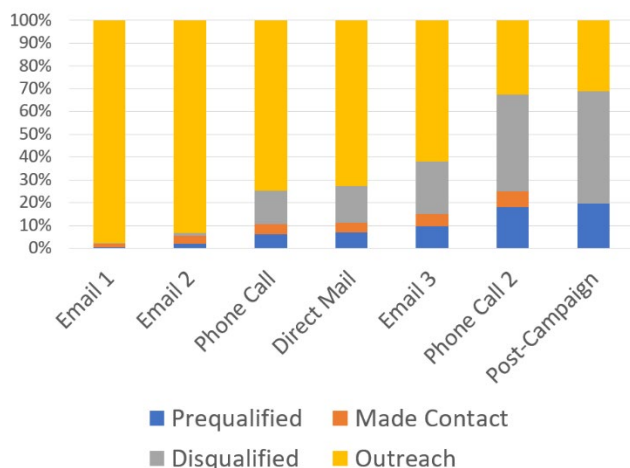
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- Educate lead on program, delivery, advantages, etc.
- Qualify any upcoming project(s)
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Any not interested/opt-outs pulled from future outreach, but updated for reporting

General messaging will follow the agenda outlined below. Based on this model, derived from similar campaigns, we expect a 15% conversion rate with about 20% holdout rate.

- Set the stage, provide a brief program summary
- Add more detail and establish the brand
- Point to the first couple as reference with a personal touch
- Add content for stubborn targets
- Check in on campaign to-date
- Final outreach effort to convert remaining targets
- Clear any in limbo and document remaining holdouts.

### Results Model





**Cooperative Marketing.** Describe ways in which your company will collaborate with AEPA Member Agencies in marketing the resulting contract. Submit any supplemental materials as PDFs and title it Exhibit A – Marketing Plan.

- Process on how the contract will be launched to current and potential agencies.
- The ability to produce and maintain in full color print advertisements in camera-ready electronic format, or electronic advertisements, including company logos and contact information.
- Anticipated contract announcements, planned advertisements, industry periodicals, other direct or indirect marketing activities promoting the AEPA awarded contract.
- How the contract award will be displayed/linked on the Respondent's website.

- Similar to our response in the previous prompt, our launch process will be to first work with AEPA leadership and create a singular vision for this MRO contract's marketing strategy. An outline for that strategy can be found in our Exhibit A – Marketing Plan.
- With joint review and approval, Ameresco's marketing deliverables may include but are not limited to the following:
  - ✓ Release a 'joint' press release announcing and highlighting our agreement (to specified and targeted media list) .
  - ✓ Pitch for coverage to targeted reporters, newsletters, and publications.
  - ✓ Post releases on respective websites and social networks as applicable.
  - ✓ Jointly manage press conference event, if appropriate.
  - ✓ Develop case study highlighting contract details – emphasizing the benefits and results of working together.
  - ✓ Create posters highlighting contract benefits to be posted in select locations.
  - ✓ Host education webinars to inform select audience(s), answer questions and drive interest.
  - ✓ Develop and host a social media initiative to support driving greater participation.
  - ✓ Post contract on Ameresco's website. Add links to other sites, if appropriate.
  - ✓ Provide contract details to post on other website, as appropriate.
  - ✓ If appropriate, work to develop a video, link and distribute widely to help inform others about the benefits of this contract. Post video on YouTube and respective websites.
  - ✓ Utilize standard Ameresco brochures and product sheets.
  - ✓ Collateral materials may be used in support of a direct marketing or email campaign.
  - ✓ Participate in and/or present at select seminars, campaigns and/or events, as appropriate.
- Ameresco often manages press conferences with our customers, if appropriate. These events usually involve jointly managing everything -- from 'save the dates' and invitations to the guest lists and inviting media and government affairs representatives, as well as drafting the media advisory, distributing day-of-event press release over the wire and pitching it. In addition, Ameresco will promote the press release and resulting media coverage via our large social media networks if amicable for the customer. For a ribbon cutting, groundbreaking, or ceremonial award, we manage the logistics such as the tent, chairs, and podium rentals and the refreshments. In support of events, we typically develop a project case study for the media kit and posters highlighting and outlining project specifics and the associated benefits. And to ease getting to the event, we provide the signage to direct visitors and press to the event location. And of course, there is the online component of the press event – from website postings to online messaging. As your sustainability partner, Ameresco will work with your team member(s) to launch and drive a Marketing Program to inform identified target audiences about the significant benefits of the contract.

A summary of the MRO program and a link for this contract will be displayed on the Professional Services page of our Smart Building Solutions division's website.

## Environmental Initiatives

**Describe** how your products and/or services support environmental goals.

Our core business is providing clean, green, and sustainable solutions that reduce greenhouse gas emissions for our customers. Since 2000, Ameresco has worked closely with our customers to identify and deliver cleantech solutions. We have supported our customers' sustainability goals with solutions ranging from comprehensive energy saving retrofits to deep energy retrofits with resilient microgrid power systems. Ameresco is committed to continuing to deliver comprehensive projects that help accelerate the global transition to a net zero carbon future. Increasingly, Ameresco is delivering low-carbon energy solutions through our owned energy assets. Ameresco's distributed generation and renewable natural gas facilities provide customers with reliable, affordable clean energy without the risk and expense of ownership and operation. In pursuit of energizing a sustainable world, Ameresco has been on the forefront of reducing our customer's energy consumption since our inception. In addition to our customer projects, we are proud that Ameresco's renewable energy assets can further facilitate our customers' goals to achieve deep emissions reductions.

**Indicate** if your company has any products in your offering that have any third-party environmental certifications.

Ameresco does not manufacture or distribute products, and as vendor-neutral engineering firm are not beholden to any equipment or controls supplier. We do not sell anything but our expertise. Ameresco promises any Client will receive unbiased recommendations and Client staff the final choice of equipment and services. Ameresco's vendor-neutral independence enables its team to be 100% unbiased in this approach, offering our clients unlimited flexibility in how the project is put together, who is involved, and what materials and systems are used. Ameresco is solely committed to finding and delivering the best advanced energy solutions. We do not represent equipment, software, or controls/systems vendors, we represent the best ultimate solutions for our customer-partners. Many ESCO's function as a sales arm for companies in the HVAC equipment/controls business; Ameresco does not operate this way.

**Describe** the business's "green" objectives (i.e. LEED, reducing footprint, etc.).

Our planet is facing a critical tipping point. The Sixth Assessment Report released in August 2021 by the United Nation's Intergovernmental Panel on Climate Change detailed the unequivocal link between human actions and our warming climate. As the report notes, the world has already warmed roughly 1.1 degrees Celsius since the 19th century, further warming is locked in, and we must adopt aggressive, rapid, and widespread emissions cuts now to avoid catastrophic environmental consequences. At Ameresco, we are dedicated to playing a pivotal role in finding solutions to this challenge. Since our founding, we have been focused on cutting emissions, improving efficiency, and deploying clean energy for customers across North America and the UK. Decarbonization is an inherent part of our business, and we are staunch supporters of policies that align with this effort. We recognize that we have a responsibility to mitigate our own contribution to climate change through continuously improving our own global operations. As part of our 2020 ESG commitments, Ameresco established a corporate-led Sustainability Team to determine our carbon inventory for our baseline and subsequent years. This baseline is the starting point toward our ultimate net zero carbon goal.

**Describe** what percentage of your offering is environmentally preferable and what are your company's plans to improve this offering.

Founded on a mission to create value and provide environmentally preferable solutions to the organizations we serve, Ameresco is relentless in the pursuit of a sustainable future. Our ESG program's theme of "Doing Well by Doing Good" reflects the inherent and grounded purpose behind the company's success in delivering solutions that enable a low carbon future.

Sustainability has always been at the forefront of our business — from our environmentally friendly MRO projects and clean energy generation assets, to workplace green initiatives and giving back to our communities. We have committed ourselves to staying ahead of the curve and at the leading edge of innovation taking place in the sustainability sector.

Since our initial public offering in 2010, Ameresco's renewable energy assets and customer projects have delivered a cumulative carbon offset equivalent to over 60 million metric tons of carbon dioxide. As such, our MRO teams are especially skilled at helping our clients identify and implement environmentally sound solutions to help them

embrace their sustainability goals. Based on Part F.2 – Price Schedule, it is estimated that up to 75% of our offering in the areas of air filters, appliances, electrical equipment, HVAC systems, lighting, and plumbing represent environmentally friendly/sustainable options.

Our plan to improve this offering would be to continue to refresh and update these catalogs to make these options more available to AEPA members.

## Additional Information

**Describe** any/all features, advantages and benefits of your organization that you feel will provide additional value and benefit to a participating AEPA agency.



**Lowest Risk Partner** – Ameresco has a proven track record of delivering large-scale projects; we have helped others thousands of clients achieve their facility improvement goals and we are confident we can achieve that goal for AEPA. Our experience includes over \$10 Billion of MRO, energy efficiency, infrastructure upgrades, and renewable energy solutions.



**Local Labor** – We give AEPA the ability keep work local and award labor subcontracts to local contractors your members already know, like and trust. Unlike our competition, we will not require members to use our “in-house” or “preferred” mechanical or electrical subcontractors. Your members will have final say and the right to “veto” any labor subcontracts. This approach will help mitigate project risk, identify the best installers and allow the AEPA to maintain full control of your project



**Vendor-Neutrality** – Ameresco will serve as a vendor-neutral, program manager that does not have any loyalty to one specific equipment manufacturer or brand. Unlike our competition, we do not feel any channel pressure or profit motives to strongly advocate on behalf of equipment manufacturers. This approach will help us provide AEPA members with trusted, independent, and objective project advice that is free from professional, financial, or personal bias.



**Creative Financing** – Our team has been a trusted and reliable financial partner for engineering, planning, energy improvement, and maintenance & operations projects. In order to deliver the best financial value for your members, we will offer a number of different approaches to minimize financial burden including our network of lender-partners, grants, incentives, and rebates



**Project Team** – Our proposed program team has decades of combined years of experience in solar design engineering, construction management, energy engineering, system integration and commissioning experience. With over 1,000 of team members across the US, our bench is strong and we have the ability to easily meet the scheduling and logistics demands of a contract like this.



**Our Philosophy** – Our team is looking to build a long-term partnership with AEPA members. To that end, our philosophy is simple: (i) outwork the competition; (ii) deliver high-quality services; (iii) treat AEPA members honestly and fairly; (iv) provide superior financial value; and (v) keep our commitments – both large and small.



**A Shared Mission** – Ameresco understands the importance of AEPA’s goals for MBE/SBE/LDBE participation because we take pride in promoting and encouraging the economic development of disadvantaged business enterprises in our projects. Our team for this Proposal will include small, minority or disadvantaged firms as well as local partners with a history of success nationwide.

**If applicable**, describe your company's ability to integrate into other ecommerce sites:

Include details about your company's ability to create punch out sites and accept orders electronically (cXML, OCI, etc.).

Provide detail on where your company has integrated with a public agency's ERP (Oracle, Infor Lawson, SAP, etc.) system in the past and include some details about the resources you have in place to support these integrations. List, by ERP provider, the following information: name of public agency, ERP system used, "go live" date, net sales per calendar year since "go live", and percentage of agency sales being processed through this connection.

Ameresco utilizes the Microsoft Dynamics 365 Supply Chain Management platform to automate and streamlines our operational processes including the ability to interact with suppliers and customers through punch out catalogues. This is the easiest and most flexible way to offer AEPA members an external catalogue, an e-commerce platform for certain items.

By using the external catalog, this can ensure that the product and price information that members subsequently process in Supply Chain Management is accurate and up to date. The requisition can then be approved and converted to a purchase order and an order can be placed at the vendor. Ameresco has the ability to implement this functionality for AEPA and would handle this as an e-commerce consulting project outside of the scope of this submission.

Ameresco does not have any public agency ERP integration projects to disclose as of the date of this submission.

## Disclosures

**Legal: Does this business have actions currently filed against it?** \_\_\_\_\_ No \_\_\_\_\_ X Yes

\*As a publicly traded company, in the ordinary conduct of our business we are subject to periodic lawsuits, investigations and claims. Ameresco includes in its filings with the U.S. Security and Exchange Commission a brief description of any material pending legal proceedings, other than ordinary routine litigation incidental to the business, to which Ameresco or any of its subsidiaries is a party or of which any of their property is the subject. Although we cannot predict with certainty the ultimate resolution of such lawsuits, investigations and claims against us, we do not believe that any currently pending or threatened legal proceedings to which we are a party will have a material adverse effect on our business, results of operations, or financial condition.

If Yes, **AN ATTACHMENT IS REQUIRED**: List and explain current actions, such as, Federal Debarment (on US General Services Administration's "Excluded Parties List"), appearance on any state or federal delinquent taxpayer list, or claims filed against the retainage and/or payment bond for projects.

Ameresco's most recent 10-K for the period ending December 31, 2021 may be located using the U.S. Securities and Exchange Commission website as follows:

<https://www.sec.gov/ix?doc=/Archives/edgar/data/1488139/000148813922000014/amrc-20211231.htm>

And our 10-Q as of June 30, 2022 may be located at:

<https://www.sec.gov/ix?doc=/Archives/edgar/data/1488139/000148813922000091/amrc-20220630.htm>

## References

Provide contact information of your business's five largest public agency customers.

Agency	Name	Title	Phone Number	Email
1. University City Schools, MO	Karl Scheidt	Exec. Director of Operations	314-290-4009	kscheidt@ucityschools.org
2. Wappingers School District, NY	Ron Broas	Director of Facilities & Operations	845-298-5150	Ronald.Broas@wappingersschools.org
3. Portland Public Schools, OR	Aaron Presberg	Sr. Program Manager, Energy & Sustainability	503-916-3279	apresberg@pps.net
4. Newport News Schools, VA	Darren Muncy	Energy & Climate Controls Supervisor	757-881-5024 ext 14132	Darren.muncy@nn.k12.va.us
5. Knox County & Knox County Schools, TN	Matt Myers	Director of Procurement	865-215-5750	Matt.myers@knoxcounty.org

## Service Questionnaire

The following chart indicates which AEPA Member States intend to participate in this solicitation category. Respond to Yes/No and choice questions by using an (X). ***Note: A Respondent must be willing and able to deliver the proposed products and/or services to 90% of the participating AEPA Member States.***

<b>AEPA Member States</b>	<b>Participating in this category.</b>	<b>In which states has this company sold products/services in the past 3 years? (Place an X where applicable)</b>	<b>If awarded, which states does this company propose to sell in? (Place an X where applicable)</b>	<b>Indicate which states this company has sales reps, distributors or dealers in. (Place an X where applicable)</b>
California	Yes	X	X	X
Colorado	Yes	X	X	X
Connecticut	Yes	X	X	X
Florida	Yes	X	X	X
Georgia	Yes	X	X	X
Illinois	No	X	X	X
Indiana	Yes	X	X	X
Iowa	Yes	X	X	
Kansas	Yes	X	X	X
Kentucky	Yes	X	X	X
Massachusetts	No	X	X	X
Michigan	Yes	X	X	X
Minnesota	Yes	X	X	X
Missouri	Yes	X	X	X
Montana	Yes	X	X	X
Nebraska	Yes	X	X	X
New Jersey	Yes	X		X
New Mexico	Yes	X	X	
North Dakota	Yes		X	
Ohio	Yes	X	X	X
Oregon	No	X	X	X
Pennsylvania	Yes	X	X	X
South Carolina	Yes	X	X	X
Texas	Yes	X	X	X
Virginia	Undecided	X	X	X
Washington	Yes	X	X	X
West Virginia	Yes	X	X	X
Wisconsin	Yes	X	X	X
Wyoming	Yes	X	X	

<b>e-Commerce:</b> Does this business have an e-commerce website?	X	No	Yes
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If YES, what is the website?

**Customer and Support Service:** It is understood depending on the type, kind and level of products and/or services being proposed in response to this solicitation will impact and determine the type and level of services required and these are identified in Part B Specifications of this solicitation.

Does this business have online customer support options?	No	<b>X</b>	Yes
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Does this business have a toll-free customers support phone option?	No	<b>X</b>	Yes
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Does this business offer local customer and support service options? **No** **X** **Yes**



**State** your normal delivery time (in days) and any options for expediting delivery.

1-2 weeks; depending on size of equipment.

**State** your backorder policy. Do you fill the order when available, or cancel the order and require participating agencies to reorder if items are backordered?

If materials are backordered, we will fulfill the order when the materials are available; additionally, when possible, we will attempt to procure from alternate suppliers.

**Describe** your company's payment terms as well as any quick pay discounts.

Ameresco's payment terms are as follows: Upon execution of this Agreement and delivery by Customer to Ameresco of the Notice to Proceed, Customer shall pay Ameresco ten percent (10%) of the Contract Cost for mobilization. Thereafter, Ameresco shall submit invoices to Customer for monthly progress payments based upon the percentage of the Project construction and equipment procurement completed at the end of each month, so that Ameresco is paid the percentage of the Contract Cost that is commensurate with the percentage of completion of the Scope of Services. A Percent Complete Acknowledgement Certificate will be executed by Customer during each month of the construction period showing the percent complete and monthly payment due. Customer shall make payment to Ameresco, within thirty (30) days after the submission of each such invoice. No quick pay discounts are offered as a part of our payment terms.

**State** your company's return policy and any applicable State restocking fees.

Depending on the manufacturers and suppliers utilized for each particular order, the restocking fees and return policy may vary, but we can outline these terms for each at the time of purchase order receipt. Ameresco will not assess additional fees for returns or restocking.

**Describe** any special program that your company offers that will improve customers' ability to access products, on-time delivery, or other innovative strategies.

Existing customers with service agreements in-place have access to a suite of advantages including prioritized ticket responses, 24/7 support. Below is an example outline of one of our service agreements.

Support Offering	Level 1	Level 2	Level 3
Firmware Upgrades Included (labor not included)	✓	✓	✓
Site Visits Per Year (8 hrs. per building listed in the agreement)	1	2	4
Face to Face or Digital Training (hrs.)	4	8	16
Service Labor Discount	✓	✓	✓
Phone/Online Support Hour Bank			
- Remote Support (hours billed in 1/2 hour increments)	8	16	Unlimited
Response Time			
- Service Call Center (800 Number)	LIVE 24/7	LIVE 24/7	LIVE 24/7
- Technician Call Back (hrs.)	8	4	4
- Technician On-Site Visit (Non-critical) Hrs.	16	12	8
- Technician On-Site Visit (Critical) Hrs.			4
Enhanced Support Success Package			
- Unlimited remote monitoring (checking the control system monthly for trends)		✓	✓
- Semi-Annual system review with building operations team		✓	✓
- Alarm Monitoring (M-F 8am to 5 pm)		Up to 15 points per building	Up to 50 points per building
- Unlimited programming support			✓
- Ongoing commissioning (looking at system performance)			✓
- Annual system back up and save.	✓	✓	✓
- DDC Maintenance ( physical look at controllers with a written report)			✓
Energy Management Success Package			
- Monitor gas and electric utility billing data			✓
-Energy Engineer to review system improvements			✓
- Benchmark building energy cost & consumption			✓
- Calculate carbon footprint reduction			✓
- Update Energy Star profile			✓



## Pricing

Is your pricing methodology guaranteed for the term of the contract?		<b>No</b>	<input checked="" type="checkbox"/> <b>X</b>	<b>Yes</b>
Will you offer customized price lists to participating entities as encouraged per the pricing terms of Part A?		<b>No</b>	<input checked="" type="checkbox"/> <b>X</b>	<b>Yes</b>
Will you offer hot list pricing (optional) as described in the pricing terms of Part A?		<b>No</b>	<input checked="" type="checkbox"/> <b>X</b>	<b>Yes</b>
Will you offer volume price discounts as described in the pricing terms of Part A?		<b>No</b>	<input checked="" type="checkbox"/> <b>X</b>	<b>Yes</b>

**Competitiveness:** In order for your response to be considered, your company must offer AEPA prices that are equal to or lower than those normally offered to individual entities or cooperatives with equal or lower volume.

Is the pricing that is proposed to AEPA equal to or lower than pricing your company offers to individual entities or cooperatives with equal to or lower volume? ☐ **No** ☒ **X** **Yes**

Indicate which of the following apply and the **level of competitive range** you are offering in response to this solicitation.

☐ Pricing offered to AEPA is EQUAL TO pricing offered to individual customer and/or cooperatives.

☒ **X** Pricing is LESS THAN individual customer and/or cooperatives. Lower by .05 %

**Cooperative Contracts:** Does your business currently have contracts with other cooperatives (local, regional, state, national)? ☐ **No** ☒ **X** **Yes**

If YES, identify which cooperative and the respective expiration date(s).

Cooperative	Expiration Date
Sourcewell	08/2025
TIPS-USA (various)	01/2023, 04/2023, 08/2023, 03/2024, 04/2024 09/2024, 03/2025, 10/2025, 08/2026, 03/2027

If YES, and your business is awarded an AEPA contract, explain which contract your business will lead with in marketing and sales representative presentations (sales calls)?

*For MRO related products and services we would lead with AEPA given the breadth/depth of this offering in addition to AEPA having significantly better market adoption/awareness relative to other national cooperatives. Taken together, this would provide our clients with a higher level of service.*

**Administrative Fee:** Which of the following best reflects how your pricing includes the individual AEPA Members' administrative fee. Mark with an "X".

<input checked="" type="checkbox"/> <b>X</b>	The pricing for the products and/or services are the same for each AEPA Member Agency, shipping, handling, administrative fee and other specific state costs are added to arrive at total price offered to the Individual AEPA Member Agency.
<input type="checkbox"/>	The pricing for the products and/or services is inclusive of the administrative fee and therefore the pricing is the same for all AEPA Member Agencies. Shipping, handling and other state specific costs are added to the adjusted AEPA Member Agency's price.
<input type="checkbox"/>	The pricing for the products and/or services includes <b>ALL</b> (shipping, handling, administrative fee, other) costs to arrive at a single price for all AEPA Member Agencies.

**Leasing:** Do your business offer leasing arrangements under this solicitation? ☐ **No** ☒ **X** **Yes**

If Yes, please indicate how the rate factor is determined and other cost factors below.

Ameresco would welcome the opportunity to provide leasing arrangements to AEPA members under this solicitation. Leasing rates, terms, and other costs would be based on current market conditions

**If an AEPA contract is approved and awarded by the Member Agencies, as a Vendor Partner, I agree to:**

<b>Responsibilities</b>	<b>Yes, indicate with an "X"</b>	<b>No, indicate with an "X"</b>
1. Designate and assign a dedicated senior-level contract manager (one authorized to make decisions) to each of the Member Agency accounts. This employee will have a complete copy and must have working knowledge of the AEPA contract.	X	
2. Train and educate sales staff on what the AEPA contract is: including pricing, who can order from the contract (by state), terms/conditions of the contract, and the respective ordering procedures for each state. It is expected that Vendor Partners will lead with AEPA contracts.	X	
3. Develop a marketing plan to support the AEPA contract in collaboration with respective AEPA Member Agencies. The marketing plan should include, but not be limited to, a website presence, electronic mailings, sales flyers, brochures, mailings, catalogs, etc.	X	
4. Create an AEPA-specific sell sheet with a space to add a Member Agency logo and contact information for use by the Member Agencies and the Vendor Partner's local sales representatives to market within each state.	X	
5. On a quarterly basis, complete the sales and administrative fee report (see attached PDF example) and submit to each Member Agency along with the respective administrative fees to be paid. If there are no sales, the Vendor Partner is required to submit a \$0 report to the AEPA Member Agency.	X	
6. Have ongoing communication with the Category Oversight Chairperson, AEPA Member Agencies and the Member Agencies Participating Entities.	X	
7. Attend two (2) AEPA meetings each year (see Part A)	X	
8. Participate in national and local conference trade shows to promote the AEPA contracts including, but not limited to the Association of School Business Officials (ASBO), the National Institute of Governmental Purchasing (NIGP), and the National Association of Educational Procurement (NAEP).	X	
9. Increase sales over the term of the contract with all participating AEPA Member Agencies.	X	

# Exceptions

## Instructions:

1. Mark "No" or "Yes" with an "X" below.
2. If "yes" is marked with an "X" below, insert answers into the form shown below, providing narrative explanations of exceptions. *(To insert more rows, hit the tab key from the last field in the last row and column.)*
3. If adding pages, the company name and identifying information as to which item the response refers must appear on each page.
4. Exceptions to local, state or federal laws cannot be accepted under this solicitation.

X	<b>No</b> , this respondent does not have exceptions to the Terms and Conditions incorporated in Parts A and B of this IFB.
	<b>Yes</b> , this respondent has the following exceptions to the Terms and Conditions incorporated in Parts A and/or B of this solicitation.

IFB Section and Page Number	Outline Number	Term and Condition	Exception

## Deviations

### Instructions:

1. Mark "No" or "Yes" with an "X" below.
2. If "yes" is marked with an "X" below, insert answers into the form shown below, providing narrative explanations of deviations. *(To insert more rows, hit the tab key from the last field in the last row and column.)*
3. If adding pages, the company name and identifying information as to which item the response refers must appear on each page.
4. Deviations to local, state, or federal laws cannot be accepted under this solicitation.

X	<b>No</b> , this respondent does not have deviations (exceptions or alternates) to the specifications listed in Part B of this solicitation.
	<b>Yes</b> , this respondent has the following deviations to the specifications listed in Part B of this solicitation.

Outline Number Part B	Specification (describe)	Details of Deviation

Business Branch Location(s) – U.S. Only	
Alaska	
Branch Address	6643 Brayton Drive
City, State, Zip Code	Anchorage, AK 99507
Arizona	
Branch Address	120 East Corporate Place
City, State, Zip Code	Chandler, AZ 85225
Branch Address	2375 East Camelback Road, Suite 400
City, State, Zip Code	Phoenix, AZ 85016
Branch Address	3544 North Romero Road, Suite 102
City, State, Zip Code	Tucson, AZ 85705
California	
Branch Address	2300 Clayton Road, Suite 1370
City, State, Zip Code	Concord, CA 94520
Branch Address	3200 Guasti Road, Suite 100
City, State, Zip Code	Ontario, CA 91761
Branch Address	42175 Zevo Drive
City, State, Zip Code	Temecula, CA 92590
Colorado	
Branch Address	12211 W Alameda Pkwy, Suite 205
City, State, Zip Code	Lakewood CO 80228
Connecticut	
Branch Address	1484 Highland Avenue, Suite 8A
City, State, Zip Code	Cheshire, CT 06410
District of Columbia	
Branch Address	101 Constitution Avenue, N.W., Suite 525 East
City, State, Zip Code	Washington, DC 20001
Delaware	
Branch Address	5301 Limestone Road, Suite 222
City, State, Zip Code	Wilmington, DE 19808
Florida	
Branch Address	13721 Jetport Commerce Parkway, Unit 5
City, State, Zip Code	Fort Meyers, FL 33913
Branch Address	2202 N. West Shore Boulevard, Suite 200
City, State, Zip Code	Tampa, FL 33607
Branch Address	333 S.E. 2nd Avenue, Suite 2000
City, State, Zip Code	Miami, FL 33131
Georgia	
Branch Address	3340 Peachtree Road, Suite 1800
City, State, Zip Code	Atlanta, GA 30326
Hawaii	
Branch Address	1001 Bishop Street, ASB Building Suite 950
City, State, Zip Code	Honolulu, HI 96813

Business Branch Location(s) – U.S. Only	
Idaho	
Branch Address	1810 Schneidermiller Avenue, Suite 321
City, State, Zip Code	Post Falls, ID 83854
Illinois	
Branch Address	10 S. LaSalle Street, Suite 3450
City, State, Zip Code	Chicago, IL 60603
Branch Address	1900 Spring Road, Suite 400
City, State, Zip Code	Oak Brook, IL 60523
Branch Address	528 South 5th Street, Suite 212
City, State, Zip Code	Springfield, IL 62701
Indiana	
Branch Address	5875 Castle Creek Parkway N. Drive, Suite 155
City, State, Zip Code	Indianapolis, IN 46250
Kentucky	
Branch Address	9300 Shelbyville Road, Suite 1025
City, State, Zip Code	Louisville, KY 40222
Maine	
Branch Address	30 Danforth Street, Suite 108
City, State, Zip Code	Portland, ME 04101
Maryland	
Branch Address	12230 Eastern Avenue
City, State, Zip Code	Chase, MD 21220
Branch Address	8825 Stanford Boulevard, Suite 210
City, State, Zip Code	Columbia, MD 21045
Massachusetts	
Branch Address	111 Speen Street
City, State, Zip Code	Framingham, MA 01701
Branch Address	117 Flanders Road, Unit 100
City, State, Zip Code	Westborough, MA 01581
Minnesota	
Branch Address	718 Xenia Avenue South, Suite 240
City, State, Zip Code	Golden Valley, MN 55416
Missouri	
Branch Address	9890 Clayton Road, Suite 220
City, State, Zip Code	St Louis, MO 63124
Montana	
Branch Address	7 West 6th Avenue, Suite 605, Power Block
City, State, Zip Code	Helena, MT 59601
Nebraska	
Branch Address	2121 N Webb Road, Suite 305
City, State, Zip Code	Grand Island, NE 68803
Nevada	
Branch Address	9130 W Post Road, Suite 120
City, State, Zip Code	Las Vegas NV 89148

Business Branch Location(s) – U.S. Only	
New Hampshire	
Branch Address	141 Banfield Road
City, State, Zip Code	Portsmouth, NH 03801
New Jersey	
Branch Address	200 Monmouth Street, Suite 280
City, State, Zip Code	Red Bank, NJ 07701
New York	
Branch Address	1377 Long Island Motor Parkway, Suite 401
City, State, Zip Code	Islandia, NY 11749
Branch Address	50 Front Street, Suite 201
City, State, Zip Code	Newburgh, NY 12550
Branch Address	6 Automation Way, Suite 103
City, State, Zip Code	Albany, NY 12205
North Carolina	
Branch Address	5550 Seventy-Seven Center Drive, Suite 380
City, State, Zip Code	Charlotte, NC 28217
Ohio	
Branch Address	640 Lakeview Plaza Boulevard
City, State, Zip Code	Worthington, OH 43085
Oregon	
Branch Address	9700 SW Capitol Highway, Suite 110
City, State, Zip Code	Portland, OR 97219
Pennsylvania	
Branch Address	301 Grant Street, Suite 270
City, State, Zip Code	Pittsburgh, PA 15219
Branch Address	4960 S. 12th Street, Philadelphia Navy Yard
City, State, Zip Code	Philadelphia, PA 19112
Tennessee	
Branch Address	520 W. Summit Hill Drive, Suite 401
City, State, Zip Code	Knoxville, TN 37902
Texas	
Branch Address	202 South Live Oak Street, Suite B
City, State, Zip Code	Tomball, TX 77375
Branch Address	7929 Brookriver Drive, Suite 250
City, State, Zip Code	Dallas, TX 75247
Virginia	
Branch Address	12001 Sunrise Valley Drive, Suite 205
City, State, Zip Code	Reston, VA 20191
Washington	
Branch Address	707 W Main Ave, Suite B-01
City, State, Zip Code	Spokane, WA 99201
Branch Address	222 Williams Avenue South, Suite 100
City, State, Zip Code	Renton, WA 98057

## Part E – Signature Forms

AEPA 023-A

Maintenance, Repair and Operation (MRO)

### Instructions

Contained herein are forms that **require a signature** from an authorized person at your company. All items found within this document are **mandatory**. Failure to sign the required areas, sections, or signature lines will allow AEPA to consider your company's proposal as **non-responsive**.

To submit the required signed forms, follow these steps:

1. Read the documents in their entirety.
2. Complete all forms and sign when required.
3. Return the forms and pages in their correct order and scan one (1) single PDF format titled “Part E – Signature Forms – Name of Bidding Company” (i.e. one PDF document for all signature forms).
4. Submit Part E, along with other required documents in Public Purchase.

\*Note, a bid checklist has been provided to review with your submission.

The following sections will need to be completed prior to submission as **one (1), single PDF** titled “Part E – Signature Forms – Name of Bidding Company”.

Uniform Guidance “EDGAR” Certification Form – \*signature required

Bid Affidavit – \*signature required

Acceptance of Bid & Contract Award – \*signature required



## **Uniform Guidance “EDGAR” Certification Form**

### **2 CFR Part 200**

When a purchasing agency seeks to procure goods and services using funds under a federal grant or contract, specific federal laws, regulations, and requirements may apply in addition to those under state law. This includes, but is not limited to, the procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 CFR 200, referred to as the “Uniform Guidance” or new “EDGAR”. All Respondents submitting proposals must complete this EDGAR Certification form regarding the Respondent’s willingness and ability to comply with certain requirements, which may apply to specific agency purchases using federal grant funds.

For each of the items below, the Respondent will certify its agreement and ability to comply, where applicable, by having the Respondent’s authorized representative check, initial the applicable boxes, and sign the acknowledgment at the end of this form. If a Respondent fails to complete any item of this form, AEPA will consider and may list the response, as the Respondents are unable to comply. A “No” response to any of the items below may influence the ability of a purchasing agency to purchase from the Respondent using federal funds.

#### **1. Violation of Contract Terms and Conditions**

Provisions regarding Respondent default are included in AEPA’s terms and conditions. Any contract award will be subject to such terms and conditions, as well as any additional terms and conditions in any purchase order, ancillary agency contract, or construction contract agreed upon by the Respondent and the purchasing agency, which must be consistent with and protect the purchasing agency at least to the same extent as AEPA’s terms and conditions. The remedies under the contract are in addition to any other remedies that may be available under law or in equity.

#### **2. Termination for Cause of Convenience**

For a participating agency purchase or contract in excess of \$10,000 made using federal funds, you agree that the following term and condition shall apply:

The participating agency may terminate or cancel any purchase order under this contract at any time, with or without cause, by providing seven (7) business days in advance written notice to the Respondent. If this agreement is terminated in accordance with this paragraph, the participating agency shall only be required to pay Respondent for goods and services delivered to the participating agency prior to the termination and not otherwise returned in accordance with the Respondent’s return policy. If the participating agency has paid the Respondent for goods and services provided as the date of termination, Respondent shall immediately refund such payment(s).

If an alternate provision for termination of a participating agency’s purchase for cause and convenience, including how it will be affected and the basis for settlement, is in the participating agency’s purchase order, ancillary agreement or construction contract agreed to by the Respondent, the participating agency’s provision shall control.

#### **3. Equal Employment Opportunity**

Except as otherwise provided under 41 CFR Part 60, all participating agency purchases or contract that meet the definition of “federally assisted construction contract” in 41 CFR Part 60-1.3 shall be deemed to include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, “Equal Employment Opportunity” (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, “Amending Executive Order 11246 Relating to Equal Employment Opportunity,” and implementing regulations at 41 CFR Part 60, “Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor.”

The equal opportunity clause provided under 41 CFR 60-1.4(b) is hereby incorporated by reference. Respondent agrees that such provision applies to any participating agency purchase or contract that meets the definition of “federally assisted construction contract” in 41 CFR Part 60-1.3 and Respondent agrees that it shall comply with such provision.

#### **4. Davis Bacon Act**

When required by Federal program legislation, Respondent agrees that, for all participating agency contracts for the construction, alteration, or repair (including painting and decorating) of public buildings or public works, in excess of \$2,000, Respondent shall comply with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 CFR Part 5, “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”). In accordance with the statute, Respondent is required to pay wages

to laborers and mechanics at a rate not less than the prevailing wages specific in a wage determinate made by the Secretary of Labor. Also, Respondent shall pay wages not less than once a week.

Current prevailing wage determinations issued by the Department of Labor are available at [www.wdol.gov](http://www.wdol.gov). Respondent agrees that, for any purchase to which this requirement applies, the award of the purchase to the Respondent is conditioned upon Respondent's acceptance of wage determination.

Respondent further agrees that is shall also comply with the Copeland "Anti-Kickback" Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that each construction completion, or repair of public work, to give up any part of the compensation to which he is otherwise entitled under his contract of employment, shall be defined under this titled or imprisoned not more than five (5) years, or both.

#### **5. Contract Work Hours and Safety Standards Act**

Where applicable, for all participating agency purchases in excess of \$100,000 that involve the employment of mechanics or laborers, Respondent agrees to comply with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, Respondent is required to compute the wages of every mechanic and laborer based on a standard workweek of 40 hours. Work in excess of the standard workweek is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the workweek. The requirements of the 40 U.S.C. 3704 applies to construction work and provides that no laborer or mechanic must be required to work in surroundings or under working conditions that are unsanitary, hazardous, or dangerous. These requirements do not apply to the purchase of supplies, materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

#### **6. Right to Inventions Made Under a Contract or Agreement**

If the participating agency's federal award meets the definition of "funding agreement" under 37 CFR 401.2(a) and the recipient or sub-recipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance or experiments, developmental or research work under the "funding agreement," the recipient or sub-recipient must comply with the requirements of 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the awarding agency.

#### **7. Clean Air Act and Federal Water Pollution Control Act**

Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended, contracts and subgrants of amounts in excess of \$150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders, or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act, as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA). When required, Respondent agrees to comply with all applicable standards, orders, or regulations issued pursuant to the Clean Air Act and the Federal Water Pollution Control Act.

#### **8. Debarment and Suspension**

Debarment and Suspension (Executive Orders 12549 and 12689), a contract award (see 2 CFR 180.222) must not be made to parties listed on the government-wide exclusions in the System for Award Management (SAM), in accordance with OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR Part 1966 Comp. p. 189) and 12689 (3 CFR Part 1989 Comp. p. 235), "Debarment and Suspension." SAM exclusions contain the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549. Respondent certifies that the Respondent is not currently listed and further agrees to immediately notify AEPA and all participating agencies with pending purchases or seeking to purchase from the Respondent if Respondent is later listed on the government-wide exclusions in SAM, or is debarred, suspended, or otherwise excluded by agencies or declared ineligible under state statutory or regulatory authority other than Executive Order 12549.

## **9. Byrd Anti-Lobbying Amendment**

Byrd Anti-Lobbying Amendment (31 U.S.C. 1352), Respondents that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that take place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.

## **10. Procurement of Recovered Materials**

For participating agency purchases utilizing Federal funds, Respondent agrees to comply with Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act where applicable and provide such information and certifications as a participating agency may require to confirm estimates and otherwise comply. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR Part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery, and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

## **11. Profit as a Separate Element of Price**

For purchases using federal funds in excess of \$150,000, a participating agency may be required to negotiate profit as a separate element of the price. See 2 CFR 200.323(b). When required by a participating agency, Respondent agrees to provide information and negotiate with the participating agency regarding profit as a separate element of the price for a particular purchase. However, Respondent agrees that the total price, including profit, charged by the Respondent to the participating agency shall not exceed the awarded pricing, including any applicable discount, under the Respondent's contract with AEPA.

## **12. General Compliance with Participating Agencies**

In addition to the foregoing specific requirements, Respondent agrees, in accepting any purchase order from a participating agency, it shall make a good faith effort to work with a participating agency to provide such information and to satisfy requirements as may apply to a particular purchase or purchases including, but not limited to, applicable record keeping and record retention requirements as noted in the Federal Acquisition Regulation, FAR 4.703(a).

## **13. Governing Law; Forum Selection.**

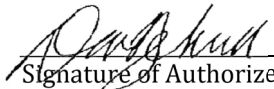
Respondent acknowledges and agrees that any legal action or proceeding in which the Association of Educational Purchasing Agencies, Inc. ("AEPA"), is a party, that in any way relates to this solicitation, any contract award or the services provided thereunder, any other document executed in connection herewith, or for recognition and enforcement of any judgment in respect hereof brought by Respondent, a participating agency, or other party hereto, or its successors or assigns, will be governed by, construed and interpreted by the laws of the Commonwealth of Kentucky, and must be brought and determined in the state courts of the Commonwealth of Kentucky in Warren County, Kentucky, or the United States Western District of Kentucky (and may not be brought or determined in any other forum or jurisdiction), and each party hereto submits with regard to any action or proceeding for itself and in respect of its property, generally and unconditionally, to the sole and exclusive jurisdiction of the aforesaid courts and waives any further objection.

Respondent further acknowledges and agrees that any legal action or proceeding in which a party includes a participating agency, but does not include AEPA as a party, that in any way relates to this solicitation, any contract award or the services provided thereunder, any other document executed in connection herewith, or for recognition and enforcement of any judgment in respect hereof brought by Respondent, a participating agency, or other party hereto, or its successors or assigns, will be governed by, construed and interpreted by the laws of the state in which the participating agency is domiciled, and must be brought and determined in the state in which the participating agency is domiciled (and may not be brought or determined in any other forum or jurisdiction), and each party hereto submits with regard to any action or proceeding for itself and in respect of its property, generally and unconditionally, to the sole and exclusive jurisdiction of the aforesaid courts and waives any further objection.

By initialing the table (1-13) and signing below, I certify that the information in this form is true, complete and accurate and I am authorized by my business to make this certification and all consents and agreements contained herein.

Respondent Certification (By Item)	Respondent Certification: YES, I agree or NO, I do NOT agree	Initial
1. Violation of Contract Terms and Conditions	Yes	DZ
2. Termination for Cause of Convenience	Yes	DZ
3. Equal Employment Opportunity	Yes	DZ
4. Davis-Bacon Act	Yes	DZ
5. Contract Work Hours and Safety Standards Act	Yes	DZ
6. Right to Inventions Made Under a Contract or Agreement	Yes	DZ
7. Clean Air Act and Federal Water Pollution Control Act	Yes	DZ
8. Debarment and Suspension	Yes	DZ
9. Byrd Anti-Lobbying Amendment	Yes	DZ
10. Procurement of Recovered Materials	Yes	DZ
11. Profit as a Separate Element of Price	Yes	DZ
12. General Compliance with Participating Agencies	Yes	DZ
13. Governing Law; Forum Selection.	Yes	DZ

Ameresco, Inc.  
Name of Business

  
Signature of Authorized Representative

David Zehala  
Printed Name

9/13/2022  
Date



## Solicitation Affidavit

**Instructions:** This form must be signed by the business's authorized representative and notarized below. If awarded, the Respondent is required to produce a copy of this document for each Member Agency with which it contracts.

1. The undersigned, is duly authorized to represent the persons, business and corporations joining and participating in the submission of the foregoing bid (such persons, business and corporations hereinafter being referred to as the Respondent), being duly sworn, on his/her oath, states that to the best of his/her belief and knowledge no person, business or corporation, nor any person duly representing the same joining and participating in the submission of the foregoing bid, has directly or indirectly entered into any agreement or arrangement with any other Respondents, or with any official of the **Member Agency**, or any employee thereof, or any person, business or corporation under contract with the **Member Agency** whereby the Respondent, in order to induce the acceptance of the foregoing bid by the **Member Agency**, has paid, or is to pay to any other Respondent, or to any of the aforementioned persons, anything of value whatever, and that the Respondent has not, directly nor indirectly entered into any arrangement, or agreement, with any other Respondent or Respondents which tends to or does lessen or destroy free competition in the letting of the contract sought for by the foregoing bid.
2. This is to certify that the Respondent, or any person on his/her behalf, has not agreed, connived, or colluded to produce a deceptive show of competition in the manner of the bidding, or award of the referenced contract.
3. This is to certify that neither I, nor to the best of my knowledge, information and belief, the Respondent, nor any officer, director, partner, member or associate of the Respondent, nor any of its employees directly involved in obtaining contracts with the **Member Agency**, or any subdivision of the state has been convicted of false pretenses, attempted false pretenses, or conspiracy to commit false pretenses, bribery, attempted bribery or conspiracy to bribe under the laws of any state or federal government for acts or omissions after January 1, 1985.
4. This is to certify that the Respondent or any person on his behalf has examined and understands the terms, conditions, the scope of work and specifications, and other documents of this solicitation and that any and all exceptions have been noted in writing and have been included with the bid submittal.
5. This is to certify that if awarded a contract, the Respondent will provide the equipment, commodities, and/or services to members and affiliate members of the Agency in accordance with the terms, conditions, the scope of work and specifications and other documents of this solicitation in the following pages of this bid.
6. This is to certify that the Respondent is authorized by the manufacturer(s) to sell all proposed products on a national basis.
7. This is to certify that we have completed, reviewed, approved, and have included all information that is required of these bid forms.

David Zehala

Authorized Representative (Please print or type)

111 Speen Street, Suite 410

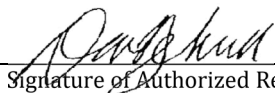
Mailing Address

VP & General Manager

Title (Please print or type)

Framingham, MA 01701

City, State, Zip



Signature of Authorized Representative

9/13/2022

Date



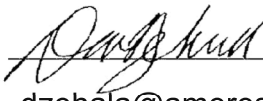
Association of Educational  
PURCHASING AGENCIES

## Acceptance of Solicitation & Contract

**Instructions:** PART I of this form is to be completed by the Respondent and signed by its Authorized Representative. PART II will be completed by the AEPA Member Agency only upon the occasion of the bid award. If approved by AEPA, the Respondent is required to produce a copy of the document for each of the AEPA Member Agency with which it contracts.

### PART I: RESPONDENT

In compliance with the Published Solicitation (IFB OR RFP), the undersigned warrants that I/we have examined all Instructions to Respondents, associated documents, and being familiar with all of the conditions of the solicitation, hereby offer and agree to furnish all labor, materials, supplies, and equipment incurred in compliance with all terms, conditions, specifications, and amendments associated with this IFB OR RFP and any written exceptions to the bid. The signature also certifies understanding and compliance with the certification requirements of the AEPA Member Agency's Terms and Conditions and/or Special Terms and Conditions. The undersigned understands that their competence, ability, capacity and obligations to offer and provide the proposed tangible personal property, professional services, construction services, and other services on behalf of the Vendor Partner as well as other factors of interest to the AEPA Member Agency as stated in the evaluation section, will be a consideration in making the award.

Business Name	<u>Ameresco, Inc.</u>	Date	<u>9/13/2022</u>
Address	<u>111 Speen Street, Suite 410</u>	City, State Zip	<u>Framingham, MA 01701</u>
Contact Person	<u>Mark Himmel</u>	Title	<u>Director of Project Development</u>
Authorized Signature	<u></u>	Title	<u>VP &amp; General Manager</u>
Email	<u>dzehala@ameresco.com</u>	Phone	<u>614-935-7487</u>

### PART II: AWARDING MEMBER AGENCY

Your bid response for the above-identified bid is hereby accepted. As a Vendor Partner, you are now bound to offer and provide the products and services identified within this solicitation, your response, and approved by AEPA, including all terms, conditions, specifications, exceptions, and amendments. As a Vendor Partner, you are hereby not to commence any billable work or provide any products or services under this contract until an executed purchase order is received from the AEPA Member Agency or Participating Entities. This contract intends to constitute the final and complete agreement between the AEPA Member Agency and Vendor Partner, and no other agreements, oral or otherwise, regarding the subject matter of this contract, shall bind any of the parties hereto. No change or modification of this contract shall be valid unless in writing and signed by both parties to this contract. If any provision of this contract is deemed invalid or illegal by any appropriate court of law, the remainder of this contract shall not be affected thereby. The initial term of this contract shall be for up to fifteen (15) months and will commence on the date indicated below and continue until February 28, 2024 unless terminated, canceled, or extended. By mutual written agreement the contract may be extended for three (3) additional 12-month periods after this initial contract term. In the event the AEPA Board does not recommend renewal of the contract, or the contract expires, it may be extended for up to six (6) months by an AEPA state.

Awarding Agency \_\_\_\_\_

Authorized Representative \_\_\_\_\_

Awarded this	day of	Contract Number
Contract to commence		
(Member Agency to select)	<u>3/1/2023</u>	<u>Or</u>

## Solicitation Checklist

**Instructions:** Utilize the checklist below, reviewing to confirm that all the required documents have been uploaded to Public Purchase, in their **specified/required format**, by the due date and time listed for this solicitation. **Submissions not following the specified/required format may result in being marked non-responsive and may not be considered for evaluation.** Respondents are reminded that failure to follow, comply with, and adhere to the enclosed instructions of this solicitation may result in their response being deemed non-responsive. AEPA, its Member Agencies, affiliate agencies, and authorized representatives are not responsible for bid proposals that are incomplete, unreadable, or received after the solicitation deadline submission date.

<b>"x"</b>	<b>Document Title, Uploaded to Public Purchase</b> <i>(Respondent must submit documents in the required title/format)</i>	<b>Format of Uploaded Document</b>	<b>Notes</b>
	<b>Bid Bond – if Required, see Part B if applicable.</b>	Upload PDF copy. The original must be received by Lakes Country Service Cooperative by due date and time.	Send to Lakes Country Service Cooperative.
	<b>Part C – State-Specific Forms – Name of Responding Company</b>	Single, Scanned PDF	<b>New Jersey Only Requirement.</b> Signatures Required.
	<b>Part D - Questionnaire – Name of Responding Company</b> Includes: <ul style="list-style-type: none"> <li>• Company Information</li> <li>• Service Questionnaire</li> <li>• Exceptions</li> <li>• Deviations</li> </ul>	Single, Scanned PDF	<b>Required.</b>
	<b>Part E – Signature Forms – Name of Responding Company</b> Includes: <ul style="list-style-type: none"> <li>• Uniform Guidance "EDGAR" Certification</li> <li>• Bid Affidavit</li> <li>• Acceptance of Bid &amp; Contract Award</li> </ul>	Single, Scanned PDF	<b>Required.</b> Signatures required.
	<b>Part F – Pricing Schedule – Name of Responding Company</b>	Excel Workbook	<b>Required.</b>
	<b>Price List and/or Catalog – Name of Responding Company</b>	Upload PDF	<b>Required.</b>
	<b>Exhibit A – Marketing Plan – Name of Responding Company</b>	Scanned PDF	<b>Optional.</b> Form not provided by AEPA, Respondent Created

**Association of Educational Purchasing Agencies**  
**Tabulation Report IFB #023-A - Maintenance, Repair &**  
**Operations (MRO)**  
**Vendor: Ameresco, Inc.**

**General Comments:** We are pleased to submit our proposal for this exciting contract. Thank you for the opportunity!

Mark Himmel - Ameresco Inc.

**General Attachments:** ACI Catalog - Ameresco.xlsx  
Belimo Catalog - Ameresco.xlsx  
Computrols Catalog - Ameresco.xlsx  
Dwyer Catalog - Ameresco.xlsx  
Exhibit A - Marketing Plan - Ameresco.pdf  
FDI Catalog - Ameresco.xlsx  
Graybar Catalog - Ameresco.xlsx  
Habegger Catalog - Ameresco.xlsx  
KMA HVAC Catalog - Ameresco.xlsx  
Misc Controls Catalog - Ameresco.xlsx  
Niagara Catalog - Ameresco.xlsx  
Part D - Questionnaire - Ameresco.pdf  
Part E - Signature Forms - Ameresco.pdf  
Part F - Pricing Schedule - Ameresco.xlsx  
Paxton - IC Real Time Catalog - Ameresco.xlsx  
Reliable Controls Catalog - Ameresco.xlsx  
Richards Electric Catalog - Ameresco.xlsx  
Senva Catalog - Ameresco.xlsx  
WCW Catalog - Ameresco.xlsx  
WolffBros Catalog - Ameresco.xlsx