

2020 Consultant Services Proposals

Recommendation for Proposal Selection

Date: September 17, 2020

To: The Energy Efficiency and Resource Management Council (EERMC)

From: Consultant Services Review Committee – Joe Garlick, Bill Riccio, and Bob White

Subject: EERMC-2020-01 – Policy & Program Planning Consultant Services

The Review Committee, comprised of Joe Garlick, Bill Riccio, and Bob White, voting members of the Energy Efficiency and Resources Management Council (EERMC), reviewed the two (2) proposals received by the Energy Efficiency and Resource Management Council (EERMC) on August 3, 2020 for the subject EERMC-2020-01 – Policy & Program Planning Consultant Services. The valuation was based on the following criteria: 1. Overview and Work Plan (35 points), 2. Qualifications and Experience (25 Points), 3. Project Management and Organization (5 points), 4. Interview Presentation Quality (10 points), 5. ISBE proposal (6 points), and 6. Cost proposal (25 points).

Based on the review of the proposals submitted, the Review Committee believes that the GDS proposal offers all the components that this requisition specifies with the best price and ISBE proposal for the Council.

The Review Committee proposes that the contract with GDS be limited to two (2) years from the contract start date with the option to renew the contract for up to two (2) additional, twenty-four (24) month periods depending on vendor performance (maximum six (6) year contract length). The contract should be limited to the hourly rates included in the proposal. The Review Committee also encourages the Council to accept the workplan as submitted by GDS on 8/3/2020 as the basis of the contract.

| Offeror | Total Points |
|----------------|---------------------|
| GDS | 98.00 |
| Optimal Energy | 92.39 |

Thank you,

Joe Garlick, Bill Riccio, and Bob White

Proposal Scores

| VENDOR | Total Points: Reviewer 1 | Total Points: Reviewer 2 | Total Points: Reviewer 3 | TOT. AVE. |
|-----------------------|-------------------------------------|-------------------------------------|-------------------------------------|------------------|
| GDS | 97.00 | 96.00 | 101.00 | 98.00 |
| Optimal Energy | 99.72 | 89.72 | 87.72 | 92.39 |

Notes/Comments:

1. *GDS*:

- *Reviewer 1 Comments*: Adequate work plan. Skilled, experienced staff and good references.
- *Reviewer 2 Comments*: Dr. Johnson, who would serve as the lead for the EERMC, is very impressive in experience and qualifications. She presented very well and did her homework about Rhode Island as did other team members (team has been watching Block Island work, etc.). Dr. Johnson is also doing similar work in Arkansas and Pennsylvania (Arkansas contract extended through 2023). The GDS Team has broad US experience – it’s also a large team (compilation of firms in different sector disciplines – 185 staff members combined) – depth of support for resources is evident. Demand Side Analytics, a member of the Team, is also a leader in non-wire alternatives.

The proposal was missing some supporting information although it was well written overall. The Team understood the challenges and opportunities for Rhode Island to maintain its national ranking in energy efficiency programs – suggested need to remain independent while reaching higher into EE program development opportunities.

Overall, this Team knows their industry well and can support the EERMC with respect to the services outlined within the RFP.

- *Reviewer 3 Comments*: Impressed by their overall team depth and experience. Dr. Johnson was very reassuring that as their lead for RI., they would be fully engaged and has familiarity working with local stakeholders. They also referenced making technical issues more digestible and making sure non-energy stakeholders understand content. I'm not sure that is the case presently. They noted experience working with limited income stakeholders which is currently under-performing. I think they have the team depth and intellectual resources to maintain the EERMC's National Leader status.

2. *Optimal Energy:*

- *Reviewer 1 Comments:* Well organized, strong work plan and staffing deployment. Skilled staff. Strong existing institutional and community knowledge, connections and relationships.
- *Reviewer 2 Comments:* The Optimal Team brings local knowledge. Team members live and work in Rhode Island making them readily available and accessible. Eric Belliveau, presented as becoming more participative in the RI program work (Eric strongly participated in the interview) and brings substantial expertise to the table.

The marketing and outreach component of the proposal was strong. The Team also provides similar work in Massachusetts and Delaware for similar entities. Their regional experience and knowledge were highlighted.

Overall, the proposal was well written. The Team understands the challenges and opportunities for Rhode Island. They also understand RI specifically due to their past work for the EERMC. The Optimal Team is also a smaller firm with most team members working for the same firm.

- *Reviewer 3 Comments:* Very comfortable with past work history and performance as well as local presence. Overall however, I feel their current team is in a transitional phase with new or recent hires and somewhat inexperienced. I do appreciate what they have helped us accomplish to date.

| Reviewer 1 Technical & Interview Scores | | | | | |
|--|---|---|--|---|---|
| VENDOR | Overview & Work Plan – 35 Points | Quals & Experience – 25 points | Project Mngmt & Organization – 5 Points | Total Technical Points – 65 Points | Interview Presentation Quality – 10 Points |
| GDS | 32.00 | 24.00 | 4.00 | 60.00 | 6.00 |
| Optimal Energy | 35.00 | 25.00 | 5.00 | 65.00 | 10.00 |

| Reviewer 2 Technical & Interview Scores | | | | | |
|--|---|---|--|---|---|
| VENDOR | Overview & Work Plan – 35 Points | Quals & Experience – 25 points | Project Mngmt & Organization – 5 Points | Total Technical Points – 65 Points | Interview Presentation Quality – 10 Points |
| GDS | 30.00 | 23.00 | 3.00 | 56.00 | 9.00 |
| Optimal Energy | 32.00 | 21.00 | 4.00 | 57.00 | 8.00 |

| Reviewer 3 Technical & Interview Scores | | | | | |
|--|---|---|--|---|---|
| VENDOR | Overview & Work Plan – 35 Points | Quals & Experience – 25 points | Project Mngmt & Organization – 5 Points | Total Technical Points – 65 Points | Interview Presentation Quality – 10 Points |
| GDS | 33.00 | 23.00 | 5.00 | 61.00 | 9.00 |
| Optimal Energy | 30.00 | 20.00 | 4.00 | 54.00 | 9.00 |

| VENDOR | Average Total Technical & Interview Points - 75 Points - | ISBE Points -6 Points - | Cost Points -25 Points - | Average Total - 106 Points - |
|-----------------------|---|----------------------------|-----------------------------|---|
| GDS | 67.00 | 6.00 | 25.00 | 98.00 |
| Optimal Energy | 67.67 | 1.41 | 23.31 | 92.39 |