

The Rhode Island Energy Efficiency and
Resources Management Council
("EERMC")

Request for Proposals
("RFP")

RFP Title:	Policy & Program Planning Consultant Services
RFP Number:	EERMC-2020-03
RFP Issuance Date:	September 28, 2020
Due Date to submit Questions:	Wednesday, October 7, 2020 at 5 pm ET
RFP Submission Deadline:	Wednesday, October 28, 2020 at 5 pm ET

SECTION 1: GENERAL INFORMATION

- 1.1. **Summary.** The Rhode Island Energy Efficiency and Resources Management Council (“EERMC”) is issuing this request for proposals (“RFP”) to solicit proposals from qualified offerors to support the EERMC in its review and oversight of energy efficiency and system reliability programs and initiatives proposed and administered by the electric and gas distribution company as required by R.I.G.L. § 39-1-27.7 and as further described in Section 5 of this RFP.
- 1.2. **EERMC.** EERMC is a council authorized, created and established pursuant to the laws of the State of Rhode Island (“State”). See R.I. Gen. Laws §42-140.1-3. EERMC council members are appointed by the State Governor with the advice and consent of the State Senate, and the Commissioner of the Rhode Island Office of Energy Resources (“OER”) serves as the EERMC executive director. See R.I. Gen. Laws §42-140.1-4. In accordance with R.I. Gen. Laws §42-140.1-6, EERMC is authorized to engage consultants and professional services as necessary and appropriate to fulfil its statutory purposes which are to:
- Evaluate and make recommendations, including, but not limited to, plans and programs, with regard to the optimization of energy efficiency, energy conservation, energy resource development; and the development of a plan for least-cost procurement for the State;
 - Provide consistent, comprehensive, informed and publicly accountable stake-holder involvement in energy efficiency, energy conservation, and energy resource management;
 - Monitor and evaluate the effectiveness of programs to achieve energy efficiency, energy conservation, and diversification of energy resources; and
 - Promote public understanding of energy issues and of ways in which energy efficiency, energy conservation, and energy resource diversification and management can be effectuated.
- 1.3. **State Purchases Act.** In general, the State Purchases Act, R.I. Gen. Laws §37-2-1 et seq., applies to every expenditure of public funds by any State governmental entity or public agency within the State. EERMC, as a council established by the Rhode Island General Assembly, is issuing this solicitation and selection for award in accordance with the underlying purposes and policies of the State Purchases Act. Any prospective offeror or offeror who wishes to submit a written protest in accordance with R.I. Gen. Laws §37-2-52, must submit the protest to the Commissioner of the Rhode Island Office of Energy Resources via email at energyresources@energy.ri.gov.
- 1.4. **Equal Opportunity Policy.** In accordance with R.I. Gen. Laws §28-5.1-10, any selected offeror(s) who contract(s) with EERMC must possess the same commitment to equal opportunity as prevails under federal contracts controlled by federal executive orders 11246, 11625 and 11375. The selected offeror(s) may be required to submit an equal employment opportunity plan as proof of

commitment. For more information, please contact the Rhode Island Equal Opportunity Office within the Rhode Island Department of Administration's Office of Diversity, Equity & Opportunity at 401.222.6398 or visit <http://odeo.ri.gov/offices/eoo>.

- 1.5. Minority and Women Business Enterprises.** In accordance with R.I. Gen. Laws §37-14.1-4, small businesses owned and controlled by one or more women who are economically disadvantaged (“WBEs”) or small businesses owned and controlled by one or more minorities who are economically disadvantaged (“MBEs”) shall have the maximum opportunity to participate in all procurements of goods or services involving funds administered by EERMC.
- 1.6. Disability Business Enterprises.** In accordance with R.I. Gen. Laws §37-2.2-3.1, small disadvantaged businesses owned and controlled by one or more individuals who have a disability (“Disability Business Enterprise”) shall have the maximum opportunity to participate in all procurements of goods or services involving funds administered by EERMC.
- 1.7. ISBE Utilization.** The term “ISBE” pertains to individuals who own small business enterprises and means all businesses that are certified as a WBE or MBE by the Rhode Island Office of Diversity, Equity & Opportunity (“ODEO”) or as a Disability Business Enterprise by the Governor’s Commission on Disabilities. In order for an offeror to receive credit for ISBE utilization either as an ISBE itself or through the utilization of a subcontractor that is an ISBE, the business must possess certification at the time the proposal is submitted to EERMC. To determine whether a business is certified by the State as an MBE or WBE or to become certified, please contact ODEO at 401.222.6398 or visit <http://odeo.ri.gov/offices/mbeco/>. To determine whether a business is certified by the State as a Disability Business Enterprise or to become certified, please contact the Rhode Island Governor’s Commission on Disabilities at 401.462.0100 or visit <http://www.disabilities.ri.gov/>. Offerors will receive between 0-6 evaluation points based on their proposed ISBE utilization rates. Each offeror must submit its proposed ISBE utilization rate as part of its proposal as instructed herein.
- 1.8. Utilization of Subcontractors.** Subcontractors are permitted, provided that their use must be clearly indicated in the proposal. To the extent possible, all proposed subcontractors must be identified in the proposal and their relevant experience and credentials provided, as well as references for relevant projects.
- 1.9. Public Disclosure of Proposals.** All proposals received by EERMC in connection with this RFP are subject to the Rhode Island Access to Public Records Act (“APRA”), R.I. Gen. Laws §38-2-1, et. seq. Once an award is made and upon receiving an APRA request, all proposals will be released by EERMC unless EERMC finds that the certain portions of information contained within the proposals are exempt from public disclosure pursuant to R.I. Gen. Laws §38-2-2(4). Offerors are advised to clearly mark or label “confidential” any portions of information within their proposals that they believe are “[t]rade secrets and

commercial or financial information obtained from a person, firm, or corporation which is of a privileged or confidential nature.” When responding to an APRA request, EERMC will take into consideration any information marked by the offeror as confidential. However, broad disclaimers that label the entire proposal as confidential will not help EERMC in its APRA analysis and may not be considered.

- 1.10. **Costs Associated with Submitting a Proposal.** All costs associated with developing or submitting a proposal in response to this RFP, or to provide oral or written clarification of its content shall be borne by the offeror. EERMC assumes no responsibility for these costs.
- 1.11. **Right to Cancel this RFP.** In accordance with R.I. Gen. Laws §37-2-23, this RFP may be cancelled at any time and/or all proposals may be rejected.
- 1.12. **Misdirected Proposals.** Any proposals misdirected to other state locations, or which are otherwise not in the email inbox of the Contact Person at the time of the submission deadline for any cause will be determined to be late and may not be considered.
- 1.13. **Proposals Irrevocable.** Proposals are considered to be irrevocable for a period of not less than sixty (60) days following the submission deadline, and may not be withdrawn, except with the express written permission of EERMC.
- 1.14. **EERMC Website.** Offerors are instructed to peruse the EERMC website and any other pertinent websites listed in Section 2.1 of this RFP on a regular basis, as additional information relating to this solicitation may be posted there from time to time. See Section 2.1 of this RFP for pertinent website address(es).
- 1.15. **Right to Transact Business in Rhode Island.** In accordance with R. I. Gen. Laws §7-1.2-1, et seq., no foreign corporation, a corporation without a Rhode Island business address, shall have the right to transact business in the State until it shall have procured a Certificate of Authority to do so from the Rhode Island Department of State. Please contact the Rhode Island Secretary of State’s Business Services Division at 401.222.3040 or visit <http://sos.ri.gov/divisions/business-portal> for more information. This is a requirement only of the selected offeror(s).
- 1.16. **Availability of Funds.** The purchase of services under an award made pursuant to this RFP will be contingent on the availability of funds.
- 1.17. **Insurance.** Prior to being issued a final award, the selected offeror(s) will be required to possess all necessary insurance, as determined by the EERMC, and continue to possess such insurance throughout the life of the award.
- 1.18. **Indemnification.** The selected and awarded offeror shall hold harmless and indemnify the EERMC and the State from and against any and all losses, damages, claims, suits, actions, liabilities, and/or expenses, including, without limitation, attorneys’ fees and disbursements of any character that arise from, are in

connection with or are attributable to the performance or nonperformance of the offeror or its subcontractors under an award stemming from this RFP.

SECTION 2: AGENCY CONTACT PERSON AND OFFEROR SUBMISSION AND FORMATTING REQUIREMENTS

2.1 Contact Person. Any communication regarding this RFP must be made in writing and directed to the Contact Person whose information is listed in the table below. Revised and/or additional information regarding this solicitation may be posted on the Pertinent Website(s) listed in the table below.

Contact Person	Becca Trietch
Mailing Address	Rhode Island Office of Energy Resources One Capitol Hill, 4 th floor Providence, RI 02908
Email Address	eermc.rfp@gmail.com
Pertinent Website(s)	http://www.rieermc.ri.gov/request-for-proposals/

2.2 Important Dates. Important dates regarding this RFP are listed in the table below.

RFP Issuance Date	September 28, 2020
Pre Proposal Conference Date	Not Applicable
Written Questions Due Date	Wednesday, October 7, 2020 at 5:00 PM (Eastern Time).
Submission Deadline	Wednesday, October 28th, 2020 at 5:00 PM (Eastern Time).

2.3 Pre Proposal Conference. There will be no pre-proposal conference for this RFP.

2.4 Written Questions. Prospective offerors may submit written questions pertaining to this RFP. Questions must be emailed as a Microsoft WORD or searchable PDF attachment to the Contact Person. The deadline to submit questions is listed within the table in Section 2.2 of this RFP. Questions and EERMC’s responses will be posted on the Pertinent Website(s).

2.5 Amendments to this RFP. If this RFP is amended or addendums are issued, written notice of the amendments and/or addendums will be posted on the Pertinent Website(s).

2.6 Submission Deadline. Each Proposal will include three (3) components: technical, cost, and ISBE. All three components must be received by the

Contact Person by the Submission Deadline as listed within in the table in Section 2.2 of this RFP.

2.7 Submission Requirements. Each Proposal must be emailed to the Contact Person and must include the following:

- One (1) original technical component.
- One (1) original cost component. The original cost component must be a separate file from the technical component and be labeled as “Cost Proposal”.
- One (1) original ISBE component. This original ISBE component must be a separate file from the technical component and be labeled as “ISBE Proposal”.
- The electronic files must be in a searchable PDF or Microsoft WORD format unless otherwise permitted by the Contact Person. Please label each file as “Technical Proposal” or “Cost Proposal” or “ISBE Proposal”.

2.8 Formatting of Written Documents. For clarity, the technical component should be typed and sections should be clearly labeled to correspond with the pertinent RFP sections. These documents should use 1” margins on 8.5”x 11” paper using a font of 12 point. Technical components should be a maximum of fifteen (15) pages not counting any attachments. Each attachment should be referenced appropriately within the proposal section and the attachment title should reference the proposal section it is applicable to. The Cover Sheet, Cost component and ISBE component should be typed using the attached templates.

SECTION 3: EVALUATION AND SELECTION PROCESS

3.1 Technical Review Team. Proposals will be evaluated and scored by a technical review team in accordance with the criteria contained herein. The chief purchasing officer, or the technical review team through delegated authority from the chief purchasing officer, will make a recommendation to the EERMC. An award shall be made to the responsible offeror(s) whose proposal is determined to be the most advantageous to the EERMC, taking into consideration price and the evaluation factors set forth in this solicitation. The EERMC is responsible for the final selection of an offeror. The EERMC reserves the right to award one, multiple, or no awards based on the proposals received. The EERMC also reserves the right to reissue the RFP at its sole discretion.

3.2 Technical Component Evaluation Stage. To advance to the second stage of the evaluation process, which factors in the cost and ISBE components, the offeror must earn a technical component score of at least 55 (84.6%) out of the maximum 65 technical points. Any proposal with a technical component score

of less than 55 points will not have the cost or ISBE components opened nor evaluated and the proposal will be dropped from further consideration.

3.3 Cost & ISBE Components. Proposals scoring 55 technical points or higher will be evaluated for cost and assigned up to a maximum of 25 points in the cost category. In addition, proposals scoring 55 technical points or higher will be evaluated for ISBE participation and assigned up to a maximum of 6 points in the ISBE participation category bringing the potential maximum score to 106 points.

3.4 Scoring. Proposals will be reviewed and scored based upon the following criteria:

Criteria	Points Available
Project Overview & Proposed Work Plan	20
Qualifications and Experience in the Energy Efficiency Sector	20
Experience Working in a Similar Capacity (e.g. stakeholder facilitation, public meetings, and testimony)	15
Demonstration and Knowledge of Rhode Island Laws & Policies – especially Least-Cost Procurement	5
Current Workload and Ability to Provide Services	5
Total Technical Points	65
Cost	25
Total Possible Evaluation Points	90
ISBE Bonus Points	6
Interview Presentation Quality	10
Total Possible Points	106

3.5 Calculation of Cost Points. The offeror with the lowest cost proposal shall receive one hundred percent (100%) of the available points for cost. All other offerors shall be awarded cost points based upon the following formula:

$$(\text{lowest cost proposal} / \text{offeror's cost proposal}) \times \text{available points}$$

For example, if Offeror A is the offeror with the lowest cost proposal of \$65,000 and Offeror B proposes a cost of \$100,000 and the total points available are 30, Offeror A would get the full 30 points and Offeror B's cost points are calculated as follows: $\$65,000 / \$100,000 \times 30 = 19.5$ points.

3.6 Calculation of ISBE Points. See Sections 1.5, 1.6 and 1.7 of this RFP for more information. EERMC adheres to 150-RICR-90-10-1 entitled *Regulations*

Governing Participation by Small Business Enterprises in State Purchases of Goods and Services and Public Works Projects. The offer with the highest ISBE participation rate shall receive one hundred percent (100%) of the available points for ISBE. All other offerors shall be awarded ISBE points based upon the following formula:

$$(\text{offeror's proposed ISBE participation rate} / \text{offeror with highest ISBE participation rate}) \times \text{available points}$$

For example, if Offeror A has the highest ISBE participation rate of 20% and Offeror B proposes an ISBE participation rate of 12% and the total points available are 6, Offeror A would get the full 6 points and Offeror B's cost points are calculated as follows: $12\% / 20\% \times 6 = 3.6$ points. See Sections 3.7 and 3.8 of this RFP for information on how ISBE participation rates are calculated.

- 3.7 ISBE Participation Rate if the Offeror is an ISBE.** The ISBE participation rate for an offeror who is an ISBE shall be expressed as a percentage and shall be calculated by taking the sum of the amount of the offeror's total contract price that will be subcontracted to ISBEs and the amount that will be self-performed by the offeror and dividing that number by the ISBE offeror's total contract price. For example if the offeror's total contract price is \$100,000.00 and it subcontracts a total of \$12,000.00 to ISBEs and will perform a total of \$8,000.00 of the work itself, the offeror's ISBE participation rate would $(\$12,000 + \$8,000) / \$100,000 = 20\%$.
- 3.8 ISBE Participation Rate if the Offeror is not an ISBE.** The ISBE participation rate for an offeror who is not an ISBE shall be expressed as a percentage and shall be calculated by taking the amount of the offeror's total contract price that will be subcontracted to ISBEs and dividing that number by the ISBE offeror's total contract price. For example if the offeror's total contract price is \$100,000.00 and it subcontracts a total of \$12,000.00 to ISBEs, the offeror's ISBE participation rate would $\$12,000 / \$100,000 = 12\%$.
- 3.9 Interview Presentation.** The chief purchasing officer, or the technical review team may select up to three of the highest scoring, qualified offerors based upon total scores received. These offerors may be interviewed by the chief purchasing officer, or the technical review team, to present their proposals and qualifications in person or via a virtual meeting, and answer any questions the chief purchasing officer, or the technical review team may have.

SECTION 4: OFFEROR'S SUBMISSIONS

Each offeror must submit a proposal containing the following information. When responding to each section below, please label responses with the corresponding RFP section.

- I. **Cover Sheet.** The offeror must complete, execute, and submit the RFP Cover Sheet which is attached hereto.
- II. **Technical Proposal.** An offeror's technical proposal must include the following information:
 - A. **Overview.** The overview should lay out the offeror's understanding of the scope of work, describe the offeror's proposed project work plan and approach, and explain how the offeror is well suited to achieve the project objectives.
 - B. **Work Plan.** The offeror should describe its proposed project work plan in detail. Specifically, the offeror should describe how they will provide services to meet all the Responsibilities described in the Scope of Work. The offeror should provide an estimate for the number of days per month of in-person service in Rhode Island their proposal includes. An illustrative annual timeline must also be included to showcase the offeror's understanding of key Council activities. In addition, a high-level summary of Rhode Island's Least-Cost Procurement Standards (<https://rieermc.ri.gov/least-cost-procurement-standards-2020-revisions/>) must be provided to demonstrate an understanding of Rhode Island's energy efficiency and system reliability procurement process.
 - C. **Company Profile.** Provide an overview of history, length of time in business, organizational and staff capacity, core competencies, and any other resources uniquely suited to achieving project objectives.
 - D. **Relevant Experience:** Describe offeror's experience with similar projects. Please also specifically address any and all experience for each member of the proposed team, including subcontractors performing more than 20% of the Workplan with serving a public Council or Board in leading and/or overseeing energy efficiency programs; managing and maintaining public websites, and providing Public Utility Commission testimony.
 - E. **Examples of Prior Work:** Provide up to three examples of previous projects that best display the offeror's ability and experience with work of a similar nature. Specify the role the offeror played in each project.

Also provide at least two previously written memos describing a technical energy issue and providing a recommendation to a client.
 - F. **Reference Information:** Provide names, email addresses, telephone numbers, and permission to contact two former or current clients for which the offeror has performed work in the last three years. Also provide references for subcontractor team members performing more than 20% of the proposed Workplan.
 - G. **Identification of Staff and Subcontractors.** List all staff and subcontractors proposed as members of the offeror's team.

- H. Staff Responsibilities.** Specifically describe each of staff and subcontractor duties, responsibilities, and areas of concentration for the project.
 - I. Staff Experience.** Please include resumes, curricula vitae, or statements of prior experience and qualification. An organizational chart showing roles and responsibilities on the project is desirable. The team may include subcontractors; however, the lead offeror will be solely responsible for the management and deliverables of the team.
 - J. Conflicts of Interests.** Describe any known conflicts of interest between offeror or an affiliate of offeror and any electric or natural gas distribution company, or any affiliates of the foregoing. In addition, describe any known conflicts of interest between offeror or an affiliate of offeror and any member of the EERMC.
 - K. Litigation.** Describe any litigation, disputes, claims or complaints, or events of default or other failure to satisfy contract obligations, or failure to deliver products, involving offeror or an affiliate of offer, and relating to providing services similar to the services being solicited by the EERMC.
 - L. Investigation.** Confirm that offeror, and the directors, employees and agents of offeror and any affiliate of offeror are not currently under investigation by any governmental agency and have not in the last four years been convicted or found liable for any act prohibited by state or federal law in any jurisdiction involving conspiracy, collusion or other impropriety with respect to bidding on any contract.
- III. Cost Proposal.** Offerors must separate their cost proposals from their technical proposals and submit cost proposals as a separate file. Please complete, execute, and submit a cost proposal using the cost proposal form template attached hereto. Offerors must complete both Task Sheets Page(s) and the All-Inclusive Price Page. Offerors must provide an estimate of any travel related expenses as a line item for each task on the cost sheet under “Additional Expenses”. Travel expenses must be shown as costs per day with an estimate of the number of days per year included in the proposal. Please note that the Scope of Work is expected to require the following commitment of hours per task, per year: Task 1 approximately 1,000 hours; Task 2 approximately 900 hours; Task 3 approximately 1800 hours and Task 4 approximately 800 hours. It is expected that work would start on January 1, 2021 for up to a two-year contract term, with an option for the EERMC to decide whether to renew and continue the selected consultant’s work for up to two additional, two-year terms (2023-2024 and 2025-2026). The All-Inclusive Price Page must represent the total cost of one-year (2021). The hourly rates included in the cost proposal template must be applicable to both contract years (2021 and 2022).
- IV. ISBE Proposal.** Offerors must separate their ISBE proposals from their technical proposals and submit ISBE proposals as a separate file. To be eligible for ISBE

points, an offeror must complete, execute, and submit the ISBE form template attached hereto. Offerors must complete both the List of ISBE Page and the ISBE Participation Rate Page. Failure to submit an ISBE proposal will result in the offeror receiving 0 points in the ISBE scoring category. See RFP Sections 1.5, 1.6, 1.7, 3.6, 3.7, and 3.8 for additional information.

SECTION 5: PROJECT DESCRIPTION AND SCOPE OF WORK

5.1 Summary: The Rhode Island Energy Efficiency and Resource Management Council (EERMC) is seeking the assistance of a technical consultant (Consultant) beginning on January 1, 2021. The Consultant will provide planning and policy support to the EERMC in its review and oversight of energy efficiency and system reliability programs and initiatives proposed and administered by the electric and gas distribution company as required by R.I.G.L. § 39-1-27.7.

5.2 Background and Motivation. The EERMC, a fifteen-member council appointed by the Governor with advice and consent of the Senate, includes eleven voting members that represent large and small commercial and industrial customers, large and small non-profits, residential customers, low income customers, environmental interests, energy design and codes, energy law and policy, energy efficiency education and employment tracking, and municipal energy users. The four non-voting members include representatives from the electric and gas utilities, heating fuel industry, and the Commissioner of the Office of Energy Resources (OER). Currently, the Council consists of many new members, some with limited experience with technical energy issues. The EERMC reports annually to the Public Utilities Commission (PUC) and to the General Assembly, and works closely with the OER. For more information, please visit: www.rieermc.ri.gov.

The Policy & Program Planning Consultant will be a crucial partner and resource to the EERMC in achieving its objectives as defined in R.I.G.L. § 42-140.1-3. These objectives are:

1. Evaluate and make recommendations including, but not limited to, the development and implementation of utility plans and programs for the least cost procurement of energy efficiency and system reliability resources that are cost-effective compared to traditional supply options; and
2. Provide consistent, comprehensive, informed, and publicly accountable stakeholder involvement in energy efficiency and system reliability resources; and,
3. Monitor and evaluate the effectiveness of programs to achieve the procurement of and investment in energy efficiency and system reliability resources; and
4. Promote public understanding of energy issues and of ways in which energy efficiency and system reliability resource procurement and investments can be effectuated.

The Policy & Program Planning Consultant will also play a critical role in educating new and existing Council members, facilitating public meetings, and engaging stakeholders. The EERMC seeks a proposal that can ensure Consultant and Consultant Staff availability to meet in-person with EERMC, OER, National Grid and other stakeholders on an as-needed basis, sometimes on relatively short notice; in-person attendance for all EERMC monthly Council meetings; in-person attendance at the EERMC Annual Retreat, and in-person attendance at relevant Public Utility Commission meetings and hearings. While a notable portion of the Scope of Work may be effectively conducted by phone or webinar, particularly in the midst of COVID restrictions, the EERMC has found significant benefit in having access to a Consultant capable of supporting regular, in-person engagement and collaboration (as those COVID restrictions ease).

Please describe your firm's capabilities in this regard and your firm's plans for in-person engagement in your Workplan. Also include all costs associated with in-person travel in your cost proposal.

- 5.3 Scope of Work:** The overarching responsibility of the selected Consultant is to enable the EERMC to meet its statutory objectives by managing projects, providing technical support, and ensuring tasks are accomplished and goals are met in compliance with the Least-Cost Procurement Statute (RIGL§ 39-1-27.7), Least-Cost Procurement Standards (<https://rieermc.ri.gov/least-cost-procurement-standards-2020-revisions/>) and other state energy policies. Specifically, the Consultant will provide critical services and support for EERMC priorities through the following roles and responsibilities:

TASK 1: Responsibilities related to EERMC Oversight

- Enhance EERMC member interpretation and understanding of utility efficiency, distributed generation, and system reliability program planning, policy development and implementation, and facilitate EERMC member participation in the planning and oversight process. Educate EERMC members, as needed, regarding other relevant, energy-related topics.
- Actively participate and provide expertise in all EERMC meetings (including any Sub-Committee or Ad-Hoc Committee meetings); all Technical Working Group meetings (including any Sub-committee or Ad-hoc meetings); System Reliability Subcommittee meetings; meetings with OER and other state agencies engaged in the implementation of least-cost procurement initiatives; all relevant PUC meetings, technical sessions, and proceedings; and any other stakeholder meetings that may be important to the successful advancement of Rhode Island’s least-cost procurement mandates. At minimum, in-person attendance at monthly public Council meetings is required.
- Develop and review policies on a range of issues germane to the EERMC’s duties including, but not limited to, triennial and annual efficiency and system reliability plan development and implementation; efficiency and system reliability standards development; energy efficiency savings targets; program budget and financing; cost-effectiveness; evaluation, monitoring,

and verification; financing; program and policy equity; and utility performance incentives.

- Document and/or conduct research and analysis, and create recommendations so that stakeholder representatives can make decisions based on sound information. Provide policy summaries, analysis, and whitepapers, as needed, to inform, guide, and empower stakeholder representatives.
- Fully participate in the development of EERMC priorities and provide technical inputs, analyses, and other efforts as necessary to advance the EERMC's priorities within the development, implementation, and evaluation of utility plans and programs for least cost procurement.
- Assume overall responsibility for managing and coordinating the work of any additional consultants hired by the EERMC to support its objectives.
- Evaluate the impacts of past and potential legislation and/or PUC directives on energy efficiency and system reliability, including, but not limited to, legislation or PUC orders related to decoupling, and system benefit charge (SBC) collections and allocations. Educate key stakeholder on such legislation and associated impacts.
- Manage EERMC website maintenance, updates, and monthly meeting materials uploads.

TASK 2: Responsibilities related to the development of work products and representation of the EERMC

- Develop work products for relevant PUC dockets (e.g. annual natural gas and electric efficiency plans), including direct testimony on behalf of the EERMC upon its request.
- Provide technical support from, and representation of, the EERMC with respect to relevant state and regional policies before entities including, but not limited to, the Rhode Island General Assembly and Executive branch agencies, ISO-New England, the Regional Greenhouse Gas Initiative (RGGI), and the Forward Capacity Market (FCM).
- Support the development of the required Annual Report on EERMC activities due on April 15 of each year to the General Assembly.
- Represent the priorities of the EERMC in various relevant stakeholder forums, including, but not limited to: codes and standards initiatives; the Alliance for Healthy Homes; the Power Sector Transformation Initiative; building energy labeling initiatives; regional and local evaluation, measurement and verification (EM&V) efforts; and efforts to improve efficiency delivery to multifamily buildings, the farm and agriculture sector, municipal utility residents and businesses, income eligible consumers, and any other identified, underserved market sector.
- Assist with oversight of National Grid's investment of ratepayer funds, including by coordinating and participating in monthly meetings with the company's strategy groups.

- Create an annual timeline of key deliverables, activities, and events to be presented at the beginning of year to the EERMC. Provide written, quarterly progress reports on all deliverables, activities, and events included in the timeline and any additions or revisions made throughout the year.

TASK 3: Responsibilities related to Energy Efficiency and System Reliability Program Design and Delivery

- Represent the EERMC’s priorities in the development of annual and triennial energy efficiency and system reliability plans.
- Verify that energy efficiency program design and implementation are delivering excellent service and maximizing the benefits of energy efficiency for all ratepayers. Provide technical support and recommendations to the utility and other key stakeholders to continually enhance program design and implementation.
- Advocate for program design and delivery improvements, including, but not limited to, providing recommendations for increasing the benefits of efficiency to underserved sectors.
- Conduct a detailed review and report on the cost-effectiveness of the annual and triennial natural gas and electric efficiency plans for submittal to the PUC.
- Provide independent assessment of utility data reports and information, including monthly data dashboards, quarterly data, and year-end performance results. Make recommendations for improvements.
- Advocate for excellent data reporting, transparency, and access to data when appropriate.
- Provide oversight of third-party analyses and studies commissioned by the EERMC including, but not limited to, market potential studies. Once completed, ensure the appropriate use of study findings in energy efficiency and system reliability procurement implementation and planning.
- Apprise the EERMC of developments in other jurisdictions that could improve the quality and delivery of energy efficiency programs and system reliability investments in Rhode Island.
- Monitor, facilitate, and report on the implementation and progress towards the goals of the annual Energy Efficiency Program Plan, including regular meetings with National Grid program managers and other affected stakeholders.
- Work with National Grid to receive more comprehensive and timely exchanges of relevant data as needed by the EERMC and/or OER.
- Work with National Grid and other stakeholders to ensure that all utility-administered energy efficiency programs are effectively coordinated and integrated with other state clean energy initiatives, including, but not limited to, programs implemented by OER, state climate change and resiliency initiatives, and financing mechanisms through the Rhode Island Infrastructure Bank.

TASK 4: Responsibilities related to Advancing Integrated Approaches and Addressing Emerging Issues

- Identify innovative approaches and improvements to energy efficiency program delivery, including, but not limited to:
 - Gas/electric integration;
 - Infrastructure development;
 - Best practices and emerging technologies;
 - Statewide education and marketing;
 - Program designs that are both deeper and broader;
 - Evaluation, measurement, and verification;
 - Financing;
 - Efficiency for delivered fuels;
 - Innovative delivery mechanisms and partnerships;
 - Performance metrics and incentives;
 - Strategic electrification;
 - Gas/electric demand management; and
 - Other new or emerging issues.
- Document research and recommendations in the format most appropriate for the audience and purpose.
- Provide direct support to OER in the form of training, planning, technical analysis, and guidance for new initiatives, and relevant specialized expertise to assist OER with existing programs and pilot programs, including programs identified in OER's RGGI Allocation Plans.
- Provide direct support to OER on renewable integration with energy efficiency.
- Research and support planning initiatives for the integration and leveraging of broader energy issues, such as strategic electrification and resiliency, with ratepayer funded efforts.
- Provide any additional work on special projects as directed by the EERMC or on an as-needed basis.

Candidate qualifications must include:

- A team of professionals with significant energy efficiency, demand response, and system reliability/ customer-side resource expertise, stakeholder and collaborative process experience, and a capacity and track record of implementing both tried-and-true and innovative approaches to meeting aggressive energy efficiency targets and system reliability investments.
- Demonstrated technical expertise, including experience in energy efficiency, demand response, and system reliability program planning, budgeting, implementation, oversight, and evaluation and verification.
- Demonstrated knowledge and understanding of energy efficiency, demand response, and system reliability programs nationwide. The ability to leverage similar work in neighboring states to offer some cost mitigation and efficiencies is preferred.

- Technical degrees are preferred, but not required.
- Experience with stakeholder facilitation, public presentations, and PUC testimony is preferred.
- Experience with researching, developing, and implementing an equity agenda to expand program benefits to underserved and historically marginalized groups.
- Basic website management and maintenance experience with WordPress is required. Examples of website management and maintenance experience must be described under relevant experience.
- Experience with government transparency requirements including open meeting laws and Public Utility Commission regulatory processes is preferred.
- The ability to host in-person and virtual meetings with call-in phone numbers and computer video/audio capabilities is required (e.g. GoToWebinar, WebEx, Zoom or other platform).
- Demonstrated knowledge and understanding of Rhode Island’s unique suite of clean energy laws and policies, particularly its least-cost procurement statute, is preferred.

Selected offeror(s) will report directly and solely to the EERMC¹.

If an offeror identifies a need for additional tasks, the offeror may indicate such additions in the project proposal.

The term of a contract signed pursuant to the terms of this Request for Proposals will be twenty-four (24) months from the date of contract signature. Upon satisfactory performance and availability of funds, the contract may be extended, under the same terms and conditions, by the EERMC for not more than two (2) additional twenty-four (24) month periods, without re-bidding, and upon mutual agreement in writing.

5.4 Required Deliverables

- A proposal must contain all requirements described in Section 4 of this RFP and an illustrative annual timeline to showcase the offeror’s understanding of key Council activities
- During each year, the selected offeror(s) will be responsible for, but not limited to, deliverables such as:
 - A cost effectiveness report on National Grid’s Annual Energy Efficiency Program Plan
 - Quarterly memos and/or presentations to the Council on energy efficiency program progress

¹ The Consultant will provide monthly verbal and written reports of issues and work tasks from previous months at monthly open meetings of the EERMC. The Consultants will also provide verbal and written summaries of upcoming issues to be resolved. All reports will be provided electronically and archived on the www.rieermc.ri.gov/.

- Quarterly memos on Consultant’s work towards key deliverables, activities and events
- Monthly presentations and report outs to the Council on relevant topics such as program oversight, and evaluation, measurement and verification efforts
- Council website updates
- Coordinating and presenting at an annual Council retreat
- Coordinating and leading at least two, one-on-one meetings with Council members on key energy efficiency and/or system reliability procurement topics throughout the year

5.5 Expected Timeline

Milestone	Anticipated Date
Proposal Award	November-December 2020
Selected Offer to Begin Work	January 1, 2021
Interim Tasks & Reports	Rolling
Possible Extension of Work for 2023 & 2024	December 2022

RFP Cover Sheet

Offeror's Name:	
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RFP Information	
Title of RFP:	
RFP Number:	

Offeror Information	
Legal Name of Offeror:	
Type of Entity (i.e. corporation, partnership, sole proprietorship):	
Mailing Address of Primary Place of Business:	
Phone Number:	
Website:	

Contact Person for the Offeror	
Name:	
Title:	
Mailing Address:	
Phone Number:	
Email Address:	

Signature of Authorized Person

Date

Printed Name, Title

Cost Proposal - Task Sheets

Offeror's Name:	
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Task Sheets. Please add or delete rows for team members and add or delete task tables as needed.

Task 1:			
Labor Costs			
Subcontractor or Team Member Name and/or Job Title	Hourly Rate	Estimated Hours	Evaluated Price (Hourly Rate * Estimated Hours)
Additional expenses that are not included in hourly rate			
Description of Expense		Price	
Total Task Price:		\$ _____	

Cost Proposal - All-Inclusive Price and Signature Page

Offeror's Name:	
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One All-Inclusive Price. This number represents the sum of all total task prices and any other costs and expenses charged to EERMC.

All-Inclusive Price:	\$ _____
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Signature of Authorized Person

Date

Printed Name, Title

ISBE Proposal – List of ISBEs Page

Offeror's Name:	
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Please see Sections 1.5, 1.6, 1.7, 3.6, 3.7, and 3.8 of the RFP for additional information.

Is the offeror a State certified ISBE (MBE, WBE or Disability Business Enterprise):	YES <input type="radio"/>	NO <input type="radio"/>
	If YES, provide the total dollar amount representing work that will be done by the offeror: <div style="text-align: right; margin-top: 10px;">\$ _____</div>	

Identification of ISBE Subcontractors (Please add rows as necessary)		
ISBE Subcontractor's Name	ISBE Mailing Address, Email Address, and Phone Number	The total dollar amount representing work that will be done by the ISBE Subcontractor
		\$ _____
		\$ _____
		\$ _____

ISBE Proposal – Participation Rate and Signature Page

Offeror's Name:	
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A. Total amount of dollars representing work that will be done by the ISBEs:	\$ _____
B. All-Inclusive Price Listed in the Cost Proposal:	\$ _____
ISBE Participation Rate (=A/B):	_____ %

Signature of Authorized Person

Date

Printed Name, Title