

## 2020 Consultant Services Proposals

### Recommendation for Proposal Selection

**Date:** November 12, 2020

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

**From:** Consultant Services Review Committee – Joe Garlick, Tony Hubbard, Bill Riccio, Kurt Teichert, Karen Verrengia

**Subject:** EERMC-2020-03 – Policy & Program Planning Consultant Services

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The Review Committee, comprised of Joe Garlick, Tony Hubbard, Bill Riccio, Kurt Teichert, and Karen Verrengia, all 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 October 28, 2020 for the subject EERMC-2020-03 – Policy & Program Planning Consultant Services. The valuation of these proposals was based on the following criteria: 1. Project Overview and Proposed Work Plan (20 points), 2. Qualifications and Experience in the Energy Efficiency Sector (20 Points), 3. Experience Working in a Similar Capacity (15 points), 4. Current Workload and Ability to Provide Services (5 points), 5. Demonstration and Knowledge of Rhode Island Laws and Policies (5 points), 6. ISBE proposal (6 points), and 7. Cost proposal (25 points).

Although interviews of bidders could have been requested, the Review Committee did not pursue this option as both vendors had been previously interviewed under the first issuance of this RFP. Therefore, the Committee provided 0 points to both proposals in the optional, 10point Interview Quality scoring category.

Based on the review of the proposals submitted, the Review Committee believes that the Optimal Energy 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 Optimal Energy 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 Optimal Energy on 10/28/2020 as the basis of the contract.*

Offeror	Total Points
Optimal Energy	92.38
GDS	87.72

Thank you,

Joe Garlick, Tony Hubbard, Bill Riccio, Kurt Teichert, and Karen Verrengia

Proposal Scores

<b>VENDOR</b>	Average Total Technical - 65 Points -	ISBE Points -6 Points -	Cost Points -25 Points -	Optional Interview Presentation Quality Points -10 Points -	<b>Average Total - 106 Points -</b>
<b>Optimal Energy</b>	63.60	3.78	25.00	0	<b>92.38</b>
<b>GDS</b>	58.20	6.00	23.52	0	<b>87.72</b>

Notes/Comments:

1. *GDS*:

- *Reviewer 1 Comments*: National experience and understanding of the field and work; overly broad workplan; experienced staff with relevant experience in the sector.
- *Reviewer 2 Comments*: Both candidates present a strong proposal. There is a clear, compatible level of experience and knowledge.

GDS proposal mentions their local context knowledge, and they have done work locally, but it felt that it could have been demonstrated stronger. GDS does bring a wealth of knowledge and expertise to the work/existing clients; however, will Rhode Island be a top priority given the laundry list of other clients and the larger markets they represent? National presence is a plus.

GDS mentions the utilization of tech tools to provide access and exchange of information/resources. The proposal made mention of establishing a Rhode Island presence but still discusses traveling and virtual meetings.

- *Reviewer 3 Comments*:
  - Very detailed and specific plan
  - Collaborative team
  - National presence – deep bench with 180 employees
  - Innovative – analytics and website development for transparency and info/continuous improvements
  - Similar roles in the country
  - Meets all established criteria
  - RI Office
  - Works in RI on Block Island and with OER
  - Leader in non-wires alternatives – Demand Side Analytics
  - Low income experience which is an important priority for the Council
- *Reviewer 4 Comments*: Both proposing firms are well-qualified to analyze energy efficiency programs. The proposal from GDS indicates that a subcontractor, Demand

Side Analytics, has direct experience working on RI programs, but the primary subcontractor, Johnson Consulting Group, does not indicate any direct RI experience.

In the Work Plan, GDS appears to prioritize Responsibility 1 and Responsibility 2, and that is where the proposal seems to indicate where most of the direct meeting time is allocated. In Responsibility 3, it is less clear how their experience and allocation of time will meet the needs of EERMC in Program Design and Delivery. The proposal includes Figures II-2 and II-3 that do not appear to relate developing programs in RI? The experience and examples of work provided for Johnson Consulting Group do not appear to convey any direct experience in this area, they are more analytical case studies.

The GDS proposal indicates it will be more of a mix of firms and sub-contractors, which raises possible issues of coordination and efficiency of communication.

The GDS team has significant national experience and that would support innovation.

The GDS proposal calls out 50 in-person meetings, though there is reference to others, but they are not enumerated.

- *Reviewer 5 Comments:*
  - Extremely detailed proposal
  - Password protected share point – good idea – may be difficult for all devices and members that are technically challenged.
  - Noted: Website execution - Efficiency Maine
  - Colorado Electrification, Pennsylvania EE Commercial Building & other reports... Appreciated.
  - A bit overwhelming to review everything under the time restraints. Sometimes less is more.
  - Wondering why a “draft” 11/11/2019 report for Low-Income program policies is included? Is it still in progress?
  - Plus - national perspective & diverse experience – Excellent!
  - Minus – anticipate at least 50 in-person meetings annually - not enough meeting time. Points subtracted
  - Learning curves during critical stage of developing 3 yr. plan - knowledge of constituents & RI Law. Points subtracted
  - Plus - Warwick office – I Appreciate that they acknowledgment the need to have a local presence. Although they are willing to add an office, I still question the ability to provide services – points subtracted

## 2. *Optimal Energy:*

- *Reviewer 1 Comments:* Broad, deep experience in RI regulatory & policy environment; well organized and detailed workplan with an understanding of the work of the EERMC; skilled staff/team members with wide range of experience.
- *Reviewer 2 Comments:* Both candidates present a strong proposal. There is a clear, compatible level of experience and knowledge.

It was clear and demonstrated that Optimal has an established success with the work in Rhode Island regarding energy efficiency. Optimal provided a more comprehensive case regarding their local knowledge context for LCP and other factors called out in the RFP. Equity is elevated as a priority, although they don't exhibit a diverse team. The optimal proposal reads as EERMC/OER would be a top priority client. But does the submission

rely too much on the existing relationship for case making? Optimal has set up shop in Rhode Island is readily available to the Council and OER. It was clear that Optimal's current workload and local presence indicated they could provide the services outlined in the RFP.

- *Reviewer 3 Comments:*
  - VT based with RI Office
  - More regional work – northeast and New England
  - Met all established criteria but weak in website needs
  - Currently works in RI
  - Not specific in current workload info
- *Reviewer 4 Comments:* Both proposing firms are well-qualified to analyze energy efficiency programs. The proposal from Optimal displays significantly more detailed knowledge of RI programs.

Optimal has had significant experience and impact in working with the TWG and National Grid directly in developing more comprehensive and aggressive program design and goal setting.

In managing workload, Optimal had dedicated in-state personnel within the company to support the responsibilities, as well as sub-consultants and analysts from other Optimal offices.

Optimal's experience is more regional, and much more local in RI.

The Optimal proposal calls out over 150 in-person meetings.

- *Reviewer 5 Comments:*
  - Already demonstrated & started to execute a plan to address input, review & response time in advance of critical votes
  - Many of the tasks have been established & fine-tuned because of Optimal's historical efforts
  - Plus – 140 in-person meetings
  - Plus - planning cycle thoroughly described
  - I appreciate the linked references within both reports
  - Both seem adequately qualified to suit the councils needs and meet the tasks listed in the RFP
  - Understanding that COVID-19 has driven us to a virtual medium and that most of meeting will be taking place this way for a while, travel will take its toll on both the budget & environment.
  - Being the “Energy Efficient” and “Resource Management” council I believe it is more efficient to have a local consultant team and to perform said duties within our jurisdiction.

Reviewer 1 Technical & Interview Scores						
<b>VENDOR</b>	<b>Overview &amp; Work Plan – 20 Points</b>	<b>Quals &amp; Experience - 20 points</b>	<b>Experience Working in Similar Capacity – 15 Points</b>	<b>Ability to Provide Services - 5 Points</b>	<b>Knowledge of RI Laws &amp; Policies - 5 Points</b>	<b>Total Technical Points - 65 Points</b>
<b>Optimal Energy</b>	20.00	20.00	15.00	5.00	5.00	65.00
<b>GDS</b>	14.00	20.00	15.00	5.00	3.00	57.00

Reviewer 2 Technical & Interview Scores						
<b>VENDOR</b>	<b>Overview &amp; Work Plan – 20 Points</b>	<b>Quals &amp; Experience - 20 points</b>	<b>Experience Working in Similar Capacity – 15 Points</b>	<b>Ability to Provide Services - 5 Points</b>	<b>Knowledge of RI Laws &amp; Policies - 5 Points</b>	<b>Total Technical Points - 65 Points</b>
<b>Optimal Energy</b>	19.00	20.00	15.00	5.00	5.00	64.00
<b>GDS</b>	16.00	20.00	15.00	3.00	3.00	57.00

Reviewer 3 Technical & Interview Scores						
<b>VENDOR</b>	<b>Overview &amp; Work Plan – 20 Points</b>	<b>Quals &amp; Experience - 20 points</b>	<b>Experience Working in Similar Capacity – 15 Points</b>	<b>Ability to Provide Services - 5 Points</b>	<b>Knowledge of RI Laws &amp; Policies - 5 Points</b>	<b>Total Technical Points - 65 Points</b>
<b>Optimal Energy</b>	18.00	20.00	15.00	3.00	5.00	61.00
<b>GDS</b>	20.00	20.00	15.00	5.00	4.00	64.00

<b>Reviewer 4 Technical &amp; Interview Scores</b>						
<b>VENDOR</b>	<b>Overview &amp; Work Plan – 20 Points</b>	<b>Quals &amp; Experience - 20 points</b>	<b>Experience Working in Similar Capacity – 15 Points</b>	<b>Ability to Provide Services - 5 Points</b>	<b>Knowledge of RI Laws &amp; Policies - 5 Points</b>	<b>Total Technical Points - 65 Points</b>
<b>Optimal Energy</b>	19.00	19.00	15.00	5.00	5.00	63.00
<b>GDS</b>	16.00	19.00	12.00	4.00	3.00	54.00

<b>Reviewer 5 Technical &amp; Interview Scores</b>						
<b>VENDOR</b>	<b>Overview &amp; Work Plan – 20 Points</b>	<b>Quals &amp; Experience - 20 points</b>	<b>Experience Working in Similar Capacity – 15 Points</b>	<b>Ability to Provide Services - 5 Points</b>	<b>Knowledge of RI Laws &amp; Policies - 5 Points</b>	<b>Total Technical Points - 65 Points</b>
<b>Optimal Energy</b>	20.00	20.00	15.00	5.00	5.00	65.00
<b>GDS</b>	16.00	20.00	15.00	4.00	4.00	59.00

<b>VENDOR</b>	<b>Total Points: Reviewer 1</b>	<b>Total Points: Reviewer 2</b>	<b>Total Points: Reviewer 3</b>	<b>Total Points: Reviewer 4</b>	<b>Total Points: Reviewer 5</b>	<b>TOT. AVE.</b>
<b>Optimal Energy</b>	93.78	92.78	89.78	91.78	93.78	<b>92.38</b>
<b>GDS</b>	86.52	86.52	93.52	83.52	88.52	<b>87.72</b>