

# The Rhode Island Energy Efficiency and Resources Management Council (“EERMC”)

## **DRAFT** Request for Proposals (“RFP”)

RFP Title:	Energy Efficiency Consultant Services
RFP Number:	EERMC-2022-04
RFP Issuance Date:	Monday, July 18, 2022
Due Date to submit Questions:	Monday, August 1, 2022 at 5:00 pm ET
RFP Submission Deadline:	Friday, August 26, 2022 at 5:00 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 mail or hand delivery to One Capitol Hill, 4<sup>th</sup> floor, Providence, RI 02908 or via email to [energyresources@energy.ri.gov](mailto: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.
- 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 present in the office 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	Steven Chybowski
Mailing Address	Rhode Island Office of Energy Resources One Capitol Hill, 4 <sup>th</sup> floor Providence, RI 02908
Email Address	cermc.rfp@gmail.com
Pertinent Website(s)	<a href="http://www.riermc.gov/">http://www.riermc.gov/</a>

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

RFP Issuance Date	July 18, 2022
Pre-Proposal Conference Date	Not Applicable
Written Questions Due Date	Monday, August 1, 2022 at 5:00 pm ET (Eastern Time).
Submission Deadline	Friday, August 26, 2022 at 5:00 pm ET (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 twenty (20) 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 (91.6%) out of the maximum 60 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 30 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:

<b>Criteria</b>	<b>Points Available</b>
Overview and Work Plan	25
Qualifications and Experience	20
Project Management and Organization	15
<b>Total Technical Points</b>	<b>60</b>
Interview Presentation Quality	10
<b>Total Possible Technical &amp; Interview Points</b>	<b>70</b>
Cost	30
<b>Total Possible Evaluation Points</b>	<b>100</b>
ISBE Bonus Points	6
<b>Total Possible Points</b>	<b>106</b>

- 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 will select up to three of the highest scoring, qualified offerors based upon total scores received. These offerors will be interviewed by the chief purchasing officer, or the technical review team, to

present their proposals and qualifications in person or virtually, 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. An illustrative annual timeline must also be included to showcase the offeror's understanding of key Council activities.
  - 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.
  - E. **Examples of Prior Work:** If possible, reference two or 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.
  - 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.
  - 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 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 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. Please note that the Scope of Work is seeking a commitment for two years, starting on January 1, 2023, with an option for the EERMC to decide whether to renew and continue the selected consultant's work for up to two additional 12-month periods in 2025 and 2026. Cost proposals will be treated as a not-to-exceed amount, which shall be the maximum amount payable and shall not be exceeded unless adjusted by a supplemental agreement.
- IV. **ISBE Proposal.** Offerors must separate their ISBE proposals from their technical proposals and submit 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, 2023. 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, residential customers, low-income customers, environmental interests, energy design and codes, energy law and policy, energy efficiency education and employment tracking, large non-profit institutions, small non-profit institutions, 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). 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](http://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.

Please note that, in 2021, Rhode Island enacted the Act on Climate, R.I.G.L. § 42-6.2, et seq., which establishes mandatory and enforceable economy-wide greenhouse gas emissions reduction goals. The scope of work that follows should be implemented in accordance with this law and serve to advance its purposes and intent wherever possible.

- 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, representing the Council before state regulators (i.e., the Rhode Island Public Utilities Commission) and ensuring tasks are accomplished and goals are met. Specifically, the Consultant will provide critical services and support for EERMC priorities through the following roles and responsibilities:

#### **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 energy efficiency and system reliability procurement 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. Please note that the EERMC (as a full

body) meets, at minimum, once per month during the calendar year. These meetings are generally held in-person in Providence, Rhode Island, however, the Council can provide for virtual participation by consultants and the public, and vendors should consider this capability when preparing their proposal and budget.

- 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; and 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.
- Represent the EERMC as its technical expert at all relevant PUC technical sessions, hearings, etc. This includes preparation of written and oral testimony.
- 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.
- Coordinate and collaborate with the Office of Energy Resources on all administrative and technical matters.

### **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 written and oral testimony on behalf of the EERMC upon its request.
- 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, income eligible consumers, and any other identified, underserved market sector.
- Assist with oversight of the electric and natural gas distribution utility's investment of ratepayer funds, including by participating in, at minimum, monthly meetings with the utility's strategy groups.

### **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.
- Advocate for and pursue energy efficiency programs and incentives that advance energy equity for all Rhode Islanders, with an emphasis on low- and moderate-income consumers and historically marginalized communities.
- 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 electric and natural gas distribution utility program managers and other affected stakeholders.
- Work with the electric and natural gas distribution utility to receive more comprehensive and timely exchanges of relevant data as needed by the EERMC and/or OER.
- Work with the electric and natural gas distribution utility 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 funded through RGGI and implemented by OER and financing mechanisms through the Rhode Island Infrastructure Bank.

### **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;
  - Energy efficiency financing;
  - Efficiency for delivered fuels;
  - Innovative delivery mechanisms and partnerships;
  - Performance metrics and incentives;
  - Strategic electrification;
  - Demand management;
  - Energy equity; and
  - Other new or emerging issues.
- Document research and recommendations in the format most appropriate for the audience and purpose.
  - Ensure that energy efficiency programs and offerings are aligned with the mandates included in the 2021 Act on Climate.
  - Research and support initiatives to improve equitable access and participation in energy efficiency programming.
  - 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 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 and system reliability program planning, budgeting, implementation, oversight, and evaluation and verification.
- Demonstrated knowledge and understanding of energy efficiency 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.
- Demonstrated knowledge and understanding of Rhode Island's unique suite of clean energy laws and policies, particularly its least-cost procurement statute, is preferred.
- Demonstrated experience in developing and presenting written and oral testimony before the Rhode Island Public Utilities Commission or similar regulatory agency in the U.S.
- An in-state, Rhode Island presence is preferred, supplemented with the demonstrated ability to participate virtually in meetings, hearings, etc. to help control contract costs.

Selected offeror(s) will report directly to the EERMC.

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

#### 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 the 2023 calendar year, the selected offeror(s) will be responsible for, but not limited to, deliverables such as:
  - A cost effectiveness report on the electric and natural gas distribution utility’s 2023 Annual Energy Efficiency Program Plan
  - Quarterly memos and/or presentations to the Council on energy efficiency program progress
  - Monthly presentations and report outs to the Council on relevant topics such as program oversight, and evaluation, measurement, and verification efforts
  - Coordinating and presenting at an annual Council retreat
  - Review of the utility’s proposed 2023 Annual Energy Efficiency Plan
  - Supporting EERMC in its recommendation to the PUC on energy efficiency targets for the 2024-2026 triannual energy efficiency planning cycle.

#### 5.5. **Expected Timeline**

<b>Milestone</b>	<b>Anticipated Date</b>
Proposal Award	October-November 2022
Selected Offer to Begin Work	January 1, 2023
Interim Tasks & Reports	Rolling
Possible Extension of Work for 2025	July 2024, subject to EERMC Discretion and Approval

## RFP Cover Sheet

<b>Offeror's Name:</b>	
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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

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

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



## Cost Proposal - All-Inclusive Price and Signature Page

<b>Offeror's Name:</b>	
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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.

<b>All-Inclusive Price:</b>	\$ _____
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\_\_\_\_\_  
Signature of Authorized Person Date

\_\_\_\_\_  
Printed Name, Title

## ISBE Proposal – List of ISBEs Page

<b>Offeror's Name:</b>	
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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.

<b>Is the offeror a State certified ISBE (MBE, WBE or Disability Business Enterprise):</b>	<input type="radio"/> YES	<input type="radio"/> NO
	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>	

<b>Identification of ISBE Subcontractors (Please add rows as necessary)</b>		
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