

CT Energy Efficiency Board

Request for Proposal (RFP) Technical Consultants to the Energy Efficiency Board

Revised November 19, 2015

The deadline for Intent to Bid and Questions has been extended to November 30, 2015. The deadline for Final Proposals has been extended to December 11, 2015. Please refer to the last page of this RFP for the complete revised RFP schedule.

Overview

The State of Connecticut Energy Efficiency Board (EEB) is seeking several technical consultants to support the EEB. These include:

- Senior Technical Consultant
- Residential Technical Consultant
- Commercial and Industrial (C&I) Technical Consultant
- Financing Technical Consultant
- Marketing Technical Consultant
- Research, Development and Demonstration (RD&D) Technical Consultant

The EEB is seeking proposals from individual consultants or groups of consultants. Proposals may be submitted for one of the positions, a subset of the positions, or all of the positions.

The EEB oversees the ratepayer-funded conservation and load management programs and initiatives administered by the electric and gas utility distribution companies and by the municipal utility cooperative. The EEB, a fifteen-member board, includes representatives from governmental agencies, business and residential consumer groups and the utilities. The EEB reports annually to the Public Utility Regulatory Authority ("PURA"), the Department of Energy and Environmental Protection ("DEEP") and to the General Assembly.

Work Scope, Responsibilities, and Qualifications of Consultant Positions

Senior Technical Consultant

Work Scope and Responsibilities:

- Support EEB Meetings. Provide lead technical support and participate in EEB monthly and other meetings. In coordination with Board members, other Board

consultants, the Program Administrators and the Board's Executive Secretary, provide input into agenda planning and material preparation, give advance briefings, and present and explain topics/issues at the meetings.

- Program, Budget and Goal Planning. On behalf of the EEB, provide lead technical input into the development of the annual goals, programs and budgets of the CT Energy Efficiency Fund, and support the EEB in its review of the goals, programs and budgets. In 2016 and 2017, the planning process will be an annual update of the 2016-2018 C&LM 3-Year Plan. In 2018, the planning process will entail the development of the 2019-2021 C&LM 3-Year Plan.
- Program Implementation, Monitoring, and Review of Results. Review and monitor program implementation; review monthly reporting of public performance dashboard and quarterly reports; review annual results. Provide support for, and meet with others on cross-sector issues including gas integration, financing, and other issues. Provide input to the EEB Evaluation Consultant on evaluation planning, review studies, program savings documentation, and regional studies.
- Marketing, Marketing Plan, and Marketing Results. On behalf of the EEB, and in coordination with the Marketing Technical Consultant, provide support with program marketing, branding, website, and public relations, including the development of marketing plans, marketing goals and objectives, and metrics and reporting.
- Regulatory Proceedings/Hearings. As needed, provide technical support for the EEB and represent the EEB in key C&LM regulatory proceedings, including C&LM proceedings of the CT Department of Energy and Environmental Protection and the Public Utilities Regulatory Authority, Integrated Resource Plans, and technical issues. Provide input on energy efficiency potential, cost-effectiveness, economic analyses, avoided costs, and related issues.
- Policy and Energy Planning. Provide technical input to EEB on planning and issues related to the state's Comprehensive Energy Strategy and other statewide energy policies. Review and advise on ISO-New England energy efficiency forecasts, regional system forecasts, regional system plans, and winter/summer peak issues.

Estimated Annual Hours: 860

Preferred Qualifications:

- A commitment to the mission and purpose of the CT Energy Efficiency Fund.

- Fifteen years of demonstrated technical experience in the energy efficiency field, including experience in program planning, budgeting, development, evaluation and implementation.
- Demonstrated familiarity with, and understanding of, efficiency and load management programs nationwide.
- Demonstrated operational and political acumen; strong facilitation and negotiation skills; and experience working with multiple stakeholders on energy issues.
- Technical degree preferred but not required.

Residential Technical Consultant

Work Scope and Responsibilities:

- EEB Support. Provide Residential technical support for the EEB, including: participating in monthly and other EEB meetings; coordination with the Department of Energy and Environmental Protection, the CT Green Bank, and other state entities; legislatively and administratively mandated EEB responsibilities; customer/trade ally inquiries and issue resolution; and other EEB-related tasks as needed.
- Residential Committee Support. Support the EEB's Residential Committee including participation in monthly meetings; research; technical and policy analysis; coordination, reporting, and meeting preparation and facilitation; recommendations of strategic program enhancements; and coordination with state agencies and programs.
- Program Implementation Support and Review. Conduct on-going monitoring and review of the residential gas and electric program implementation and progress toward goals. Assure that C&LM Plan priorities are being carried out effectively; and oversee Program Administrators' activities and performance through project tracking, analysis of statewide reporting, and program dashboards.
- Planning and Annual Plan Updates. On behalf of the EEB and Residential Committee, provide residential technical input into the development of the annual goals, programs and budgets of the CT Energy Efficiency Fund, and support the EEB and Residential Committee in its review of residential goals, programs and budgets. In 2016 and 2017, the planning process will be an annual update of the 2016-2018 C&LM 3-Year Plan. In 2018, the planning process will entail the development of the 2019-2021 C&LM 3-Year Plan.
- Residential Program Evaluation Review. Provide technical input and recommendations regarding evaluation planning and implementation. This

includes assisting with the scoping of evaluation studies and application of study results to the residential programs.

- Additional Expert Engineering, Financing, and Market Analysis Support. Provide additional expertise to the EEB, Residential Committee and the Program Administrators.

Estimated Annual Hours: 770

Preferred Qualifications:

- A commitment to the mission and purpose of the CT Energy Efficiency Fund.
- Fifteen years of demonstrated technical experience in the residential energy efficiency field, including experience in program planning, development, evaluation and implementation.
- Demonstrated familiarity with, and understanding of, residential efficiency management programs nationwide.
- Experience working with multiple stakeholders on energy issues.
- Technical degree preferred but not required.

C&I Technical Consultant

Work Scope and Responsibilities:

- EEB Support. Provide C&I technical support for the EEB, including: participating in monthly and other EEB meetings; coordination with the Department of Energy and Environmental Protection, the CT Green Bank, and other state entities; legislatively and administratively mandated EEB responsibilities; customer/trade ally inquiries and issue resolution; and other EEB-related tasks as needed.
- C&I Committee Support. Support the EEB's C&I Committee including research; technical and policy analysis; coordination, reporting, and meeting preparation and facilitation; recommendations of strategic program enhancements; and coordination with state agencies and programs.
- Program Implementation Support and Review. Conduct on-going monitoring and review of the C&I gas and electric program implementation and progress toward goals. Assure that C&LM Plan priorities are being carried out effectively; and oversee Program Administrators' activities and performance through project tracking, analysis of statewide reporting, and program dashboards.
- Planning and Annual Plan Updates. On behalf of the EEB and C&I Committee, provide C&I technical input into the development of the annual goals, programs

and budgets of the CT Energy Efficiency Fund, and support the EEB and C&I Committee in its review of C&I goals, programs and budgets. In 2016 and 2017, the planning process will be an annual update of the 2016-2018 C&LM 3-Year Plan. In 2018, the planning process will entail the development of the 2019-2021 C&LM 3-Year Plan.

- C&I Program Evaluation Review. Provide technical input and recommendations regarding evaluation planning and implementation. This includes assisting with the scoping of evaluation studies and application of study results to the C&I programs.
- Additional Expert Engineering, Financing, and Market Analysis Support. Provide additional expertise to the EEB, C&I Committee and the Program Administrators.

Estimated Annual Hours: 870

Preferred Qualifications:

- A commitment to the mission and purpose of the CT Energy Efficiency Fund.
- Fifteen years of demonstrated technical experience in the C&I energy efficiency field, including experience in program planning, development, evaluation and implementation.
- Demonstrated familiarity with, and understanding of, C&I efficiency management programs nationwide.
- Experience working with multiple stakeholders on energy issues.
- Technical degree preferred but not required.

Marketing Technical Consultant

Work Scope and Responsibilities:

- EEB Marketing Committee Support. Provide technical support for EEB Marketing Committee, including preparation for and participation in monthly EEB Marketing Committee meetings.
- Program Marketing and Marketing Services Committee (MSC) Support and Review, including Website Enhancements and Marketing Metrics. Assist EEB, MSC, MSC sub-committees (e.g. web committee) with marketing, branding, website, and public relations including for the joint project on Energize CT with the Department of Energy and Environmental Protection, the CT Green Bank, and the Program Administrators. Support website enhancements and program marketing. Define, monitor, and review metrics of marketing performance and reports.

- Statewide Marketing Plan Implementation and Review. Provide input and review on marketing activities under the annual Statewide Marketing Plan (as provided in the 3-Year C&LM Plans and annual Plan updates). This includes input to, and monitoring of, research, campaigns, customer engagement platforms, and other Marketing Plan efforts.
- Development of Marketing Plans and Marketing Goals. Provide input into, and review the development of the annual updates of the C&LM 3-Year Plan. Propose and assist in scoping of the key Marketing Plan activities. Identify, develop, and establish marketing goals, measurable targets, and performance metrics. In 2016 and 2017, the planning process will be an annual update of the 2016-2018 C&LM 3-Year Plan. In 2018, the planning process will entail the development of the 2019-2021 C&LM 3-Year Plan.
- Technical Analysis, Performance Review, and Key Indicators. Assist with technical review and analysis focused primarily on cost and performance data. Review data for CT and other comparable states; identify, analyze, and track key performance indicators systematically (including via the statewide dashboard for CT); and use performance data to help determine goals and monitor achievements, as well as for future planning.

Estimated Annual Hours: 860

Preferred Qualifications:

- A commitment to the mission and purpose of the CT Energy Efficiency Fund.
- Familiarity with energy efficiency programs nationwide, including energy efficiency marketing programs and initiatives.
- Strong understanding of marketing/communications concepts and strategies.
- Experience working with multiple stakeholders on energy issues.

Financing Technical Consultant

Work Scope and Responsibilities:

- Support for the Joint Committee of the EEB and CT Green Bank Board of Directors. Provide technical support for quarterly Joint Committee meetings. Work with the CT Green Bank, Program Administrators, the CT DEEP, and other Board Consultants to assist in the development and review of collaborative financing strategies, plans and products in preparation for Joint Committee meetings. Provide support/input at meetings.

- Financing Support for EEB and Committee Meetings. Provide technical support for monthly EEB, Residential Committee and C&I Committee meetings, in addition to monthly financing coordination meetings.
- Financing Support for Residential and C&I Programs. Support the Residential Committee and C&I Committee. Support the Residential and C&I Technical Consultants in their work with the EEB and their respective Committees. Analyze market research, identify gaps in financing offerings, and recommend products and other ways to fill those gaps. Work with the CT Green Bank, Program Administrators, the CT DEEP, and other Board consultants to develop proposed solutions that optimize the mix of incentives and private sector financing.
- Planning and Annual Plan Updates. Provide financing technical input into the development of the annual goals, programs and budgets of the CT Energy Efficiency Fund, and support the EEB and its Committees in their review of financing goals, programs and budgets. In 2016 and 2017, the planning process will be an annual update of the 2016-2018 C&LM 3-Year Plan. In 2018, the planning process will entail the development of the 2019-2021 C&LM 3-Year Plan.

Estimated Annual Hours: 340

Preferred Qualifications:

- A commitment to the mission and purpose of the CT Energy Efficiency Fund.
- Several years of demonstrated technical experience in energy efficiency finance, including program planning, development, evaluation and implementation. Understanding of evolving energy efficiency financing products and their application in various state energy efficiency programs.
- Experience working with multiple stakeholders on energy issues.
- Technical degree preferred but not required.

RD&D Technical Consultant

Work Scope and Responsibilities:

- Support for the Policy Working Group (PWG). Provide strategic support to the PWG, and support product reviews and recommendations. Support and participate in monthly PWG meetings. The PWG is a stakeholder expert committee that advises on the suitability and eligibility of new technologies and services for the state's energy efficiency programs.

- Support for EEB and EEB Committees. As needed, provide support on RD&D, technical and program issues for the EEB and the Residential and C&I Committees.

Estimated Annual Hours: 90

Preferred Qualifications:

- A commitment to the mission and purpose of the CT Energy Efficiency Fund.
- Fifteen years of demonstrated technical experience in the energy efficiency field, including familiarity with a wide range of residential and C&I efficiency products and technologies.
- Technical degree preferred but not required.

Requirements of Selected Applicant(s)

Selected applicant(s) will be expected to develop annual workplans describing anticipated work tasks, priorities, and budget. The selected applicant(s) will be expected to budget their time to keep within the workplan and will require the approval of the EEB prior to embarking on work that is outside of the scope of the workplan. Selected applicant(s) will report directly and solely to the EEB. Selected applicant(s) shall submit invoices on a monthly basis to the EEB Consultant Committee and the EEB Executive Secretary. A separate invoice reflecting each utility's share will be prepared for the utility's Accounts Payable Department and supplied to the utilities' representatives. Each consultant will provide a brief written summary of activities on a monthly basis as part of the invoicing procedure.

Proposal Requirements and Timeline

The EEB reserves the right, at its sole discretion, to reject any or all proposals, to waive any minor irregularities or informalities in a proposal, and to enter into any agreement deemed by the EEB to be in the best interest of the ratepayers of the State of Connecticut. The EEB may enter into agreements with one or more of the applicants. The EEB reserves the right to discuss with the selected applicant(s) any terms and conditions, including financial issues, for any proposed project.

Applicants should submit a proposal including qualifications, prior experience, references, proposed hourly and total compensation, estimated expenses, overhead and/or management costs (if applicable), 6% business service tax on labor (only for Connecticut residents who are consultants), and a response to the responsibilities detailed above. Please limit proposals to ten pages for individual consultants or twenty pages for more than one consultant (the page limits do not include supporting reference materials such as resumes, project experience, budget details,

etc.) Applicants must not have any real or perceived conflicts of interest with Eversource Energy or United Illuminating.

For proposals that include more than one of the technical consultant positions, the proposal should include a description of how the group of consultants will be managed. If a specific manager of the group is identified in the proposal, please describe how the manager would relate to, and interact with, the other consultants and with the EEB.

Applicants can choose to submit an alternate proposal to support the technical needs of the EEB that is not in direct response to this RFP, but all applicants must submit a proposal in response to this RFP before submitting an alternate proposal.

Proposals should include scopes of work for January - December 2016. The EEB has the option to renew and continue the consultants' work for 2017 and 2018. Proposals should include pricing information for 2016, 2017, and 2018.

All questions or other correspondence regarding this RFP should be sent in writing to Craig Diamond, EEB Executive Secretary, at craig.diamond@energizect.com. The revised timeline for this RFP is as follows:

Publication of RFP:	October 23, 2015
Intent to bid and questions on RFP due:	November 30, 2015 (5:00 pm)
Answers to questions provided:	December 2, 2015
Proposal deadline:	December 11, 2015 (5:00 pm)
Interviews conducted:	December 14-22, 2015
Selection decisions:	January 2016

The intent to bid and questions on the RFP shall be submitted in writing via email to the EEB Executive Secretary. All questions and answers will be provided to all respondents who indicated an intent to bid (answers will be developed by the EEB Consultant Committee). All proposals should be submitted to the Executive Secretary via email.

Respondents who do not submit an intent to bid by the November 30 deadline can still submit final proposals, but they will not be able to submit any questions on the RFP after November 30.