

# **Connecticut Energy Efficiency Board (EEB)**

## **Request for Proposal Evaluation Administrator for the EEB**

**June 7, 2016**

### **Overview**

The State of Connecticut Energy Efficiency Board (EEB) is seeking an Evaluation Administrator (comprised of a team of consultants) to manage the evaluation function of the CT Conservation and Load Management (C&LM) programs, which are administered by the electric and gas utility distribution companies and by the municipal utility cooperative (utility program administrators). The EEB, which advises the electric and gas utility distribution companies and oversees the C&LM programs, is a fifteen-member board that includes representatives from governmental agencies, business and residential consumer groups and the utilities. The EEB reports annually to the General Assembly.

Pursuant to Connecticut General Statutes 16-245m, DEEP must adopt an independent, comprehensive program evaluation, measurement and verification process to ensure that the C&LM Plan is implemented appropriately and efficiently. The Evaluation Administrator reports to the EEB's Evaluation Committee, which is a subset of the EEB's voting members. The activities of the Evaluation Administrator and Evaluation Committee follow and adhere to the EEB's Program Evaluation Roadmap. All applicants should review the Evaluation Roadmap as it sets forth important responsibilities and processes for evaluation activities in Connecticut that are different than the processes in some other states. The current version of the Evaluation Roadmap can be viewed and downloaded [here](#).

Connecticut is a leading state in energy efficiency, demand response, and load management programs – labeled “Conservation and Load Management,” or “C&LM” in state statute – in several ways. First, Connecticut C&LM programs address a wide range of policies and objectives, cover the full breadth of customer sectors and market segments, employ a wide variety of program and market strategies, and seek to achieve deep and comprehensive energy and demand savings to benefit customers and the state. Second, these ambitious objectives and extensive program efforts are pursued in the context of significant but limited funding, and with strong focus both on leveraging the ratepayer monies used to fund the programs, and on advancing market-based strategies to achieve the savings and other benefits. The combination of ambitious objectives, a wide range of programs, a strong focus on market-based strategies and leveraging, utilities that are supportive of energy efficiency and demand resources, and an engaged public stakeholder board in the form of the EEB makes Connecticut a very interesting and rewarding place to work.

The EEB seeks an Evaluation Administrator team that can perform and target the evaluation activities to maximize the value and usefulness of the evaluation study findings, thereby assisting Connecticut to achieve its objectives.

## **Work Scope and Responsibilities**

Pursuant to Connecticut General Statutes 16-245m(d)(4), The Evaluation Administrator (Administrator) advises the EEB regarding development of a schedule and plans for evaluations and oversees the program evaluation, measurement and verification process on behalf of the EEB. The Administrator provides technical expertise on all aspects of energy efficiency program evaluation and is responsible for evaluation planning, RFP development and contractor selection, facilitation of communications between evaluation contractors and utility program administrators, project development, project management and completion, communication of results, participation in relevant technical and policy forums, and reporting. The Administrator communicates study results to the Evaluation Committee, EEB and other stakeholders, files evaluation reports with EEB and with DEEP, and represents the EEB in technical and policy forums as requested. The Administrator also staffs bi-weekly meetings of the Evaluation Committee, provides regular status reports to the Evaluation Committee and the EEB, and prepares an annual report for submission to the CT General Assembly.

The current version of the Evaluation Plan can be viewed and downloaded [here](#). For reference, evaluation study reports and communications of results can be found [here](#).

Specific responsibilities of the Administrator include:

### **Evaluation Planning**

Manage the development of a three-year Evaluation Plan, in addition to annual updates of the Evaluation Plan. The Evaluation Plan is incorporated into the three-year overall C&LM Plan that is approved by the EEB and then by the CT Department of Energy and Environmental Protection (DEEP). The primary component of the Evaluation Plan is a list of evaluation studies and an accompanying budget. In developing the Evaluation Plan, receive input from the utility program administrators, Evaluation Contractors, EEB Evaluation Committee members, and EEB Technical Consultants.

### **RFP Development and Contractor Selection**

Develop request for proposals for contractors to conduct evaluation studies for both broad and specific research areas (e.g., residential, commercial and industrial sectors). Evaluate proposals and provide recommendations which include documentation of the selection process to the Evaluation Committee, which selects the contractors. For a limited number of small projects, the Administrator might conduct its own RFP process and make contractor selections. The Evaluation Administrator is responsible for selecting the firm for specific evaluation project work assignments from the list of firms approved by the Committee.

## Project Development

For each specific evaluation project, develop a scope of work for review and approval by the Evaluation Committee. The scope of work document includes objectives, tangible outcomes, design methodology, sample selection, project task timeline, analytical methods, budget, survey targets/topics/timing, and type and timing of data requests. Once scopes of work are approved by the Evaluation Committee, work with evaluation contractors to develop and finalize work plans for contractor work. Receive input from EEB Technical Consultants in developing project scopes of work.

## Project Management and Completion

Lead the project management process. Provide comment and direction to the evaluation contractors regarding design, methodologies, implementation, budget, and study logistics. Manage evaluation contractors' performance through bi-weekly meetings and reviews of monthly reports for each active project. Work with the evaluation contractors to resolve issues and expedite solutions. Review and approve all deliverables and milestones. Review all interim work products and any issues of importance that may impact the results or cost of the evaluation. Coordinate information and data transfer between the utility program administrators and evaluation contractors. Review preliminary results and make review drafts available for comment from Board members, EEB Consultants, the utilities, and the public. Review all comments, recommend final changes to the Evaluation Committee, and coordinate changes with the evaluation contractor.

## Communication of Results and Participation in Technical and Policy Forums

Provide the EEB with an independent assessment of evaluation activities, results, and reports. As results become available, assess adequacy, quality and clarity of information provided. Using evaluation results, summarize recommended changes to the CT Program Savings Document (PSD) (the Connecticut version of a technical reference manual) and energy efficiency measure savings calculations. Summarize the final report, and submit the summary and full report. Develop recommendations on changes that the utility program administrators should make as result of the study recommendations. Document and monitor the degree to which recommendations have been implemented. Arrange for and review materials for final evaluation contractor presentation of results.

If requested, provide assessments and recommendations to the EEB related to state, regional and national complementary policies and programs related to evaluation.

Provide technical support to the EEB members and the utility program administrators in interpreting study design, data and results. Keep the EEB apprised of developments and evaluation studies performed in other states, and new methods and practices developed in published literature, which could improve the effectiveness of Connecticut's energy efficiency programs and evaluation practices.

At the request of the EEB, work with other Connecticut state and local agencies to optimize the use of data and information collected during evaluation and market assessment activities to further other energy goals in the State of Connecticut.

If requested, participate in the Northeast Energy Efficiency Partnership's Evaluation, Measurement & Verification Forum by assuming a leadership role for the EEB in all discussions and negotiations involving Forum projects, and bring substantive issues before the EEB Evaluation Committee. Support working committees for all projects to represent state of Connecticut interests. Review all interim products for studies assigned, review draft reports, and summarize results.

If requested, testify on behalf of the EEB at regulatory and other proceedings.

### Staffing Evaluation Committee Meetings, and Reporting

Staff regular meetings of the Evaluation Committee. Develop status reports of key dates and milestones. Develop monthly status reports of all planned and active projects. Develop an annual report for the Energy & Technology Committee of the CT General Assembly.

### Other

Provide technical expertise in periodically modifying the Evaluation Roadmap and utilize evaluation best practices in order to obtain higher value results from evaluation and assessment activities.

As needed, participate in EEB meetings and in meetings of the EEB's Residential and Commercial & Industrial Committees.

### Qualifications

Qualifications include:

- Technical team members should have a minimum of five years demonstrated technical experience in the energy efficiency field, including experience in evaluation and market assessment.
- Must possess technical expertise in experimental design and energy efficiency.
- Demonstrated experience with energy efficiency evaluation programs nationwide.
- The ability to leverage similar work in neighboring states to offer some cost mitigation and efficiencies is preferred.
- Experience working with/for Boards and advisory committees is preferred.
- Technical degree in data analysis, economic analysis, energy management and/or environmental review 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 budget and will require the approval of the Evaluation Committee prior to embarking on work that is outside of the scope of the workplan. Selected applicant(s) will report directly to the Evaluation Committee. Selected applicant(s) shall submit invoices on a monthly basis to the Evaluation 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. The Administrator will provide a brief written summary of activities on a monthly basis as part of the invoicing procedure.

### **Proposal Requirements and Timeline**

Proposals prepared in response to this RFP should be submitted to the EEB. 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, a response to the responsibilities detailed above, and a proposed budget with proposed hourly rates and total compensation, estimated expenses, overhead, and 6% business service tax on labor (only for Connecticut residents who are consultants). Please limit proposals to twenty pages (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 (or vendors that provide energy efficiency services to them), or with any EEB members or EEB Technical Consultants.

The start date for the Administrator will be approximately September 1, 2016. Proposals should include a scope of work for September 2016 - December 2017. The EEB has the option to renew and continue the Administrator's work for 2018. Proposals should include pricing information for September 2016 – December 2017, as well as for 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](mailto:craig.diamond@energizect.com). The timeline for this RFP is as follows:

Publication of RFP:	June 7, 2016
Questions on RFP due:	June 21, 2016
Intent to bid due:	June 27, 2016
Bidders conference call:	June 27, 2016, 10:30 am – 12:00 pm EST
Proposal deadline:	July 19, 2016 (5:00 pm EST)
Interviews conducted:	August 1-5 and Aug 15-19, 2016
Selection decision:	September, 2016

The bidders conference call will be a web conference using GoTo Meeting. The conference phone number and web link are provided here:

Call date and time: June 27, 10:30 am – 12:00 pm EST  
Conference phone number: (872) 240-3212 / Passcode: 758-404-661  
Web link: <https://global.gotomeeting.com/join/758404661>

The intent to bid and questions on the RFP shall be submitted in writing via email to the EEB Executive Secretary at [craig.diamond@energizect.com](mailto:craig.diamond@energizect.com). All questions and answers will be provided to all respondents who indicated an intent to bid. All proposals should be submitted to the Executive Secretary via email by July 19, 2016 at 5:00 pm EST.