



Solicitation Information
October 13, 2015

RFP # 7549964

TITLE: Consultant Services: Rhode Island Renewable Thermal Market Development Strategy

Submission Deadline: Tuesday, November 10, 2015 @ 2:00 PM (Eastern Time)

Pre-Bid conference: No

Questions concerning this solicitation may be addressed to gail.walsh@purchasing.ri.gov no later than **Friday, October 23, 2015 at 5:00 PM**. Questions should be submitted in a *Microsoft Word attachment*. Please reference **RFP # 7549964 Consultant Services: Rhode Island Renewable Thermal Market Development Strategy** on all correspondence. Questions received, if any, will be answered and posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

SURETY REQUIRED: No

BOND REQUIRED: No

Vendors must register on-line at the State Purchasing Website at www.purchasing.ri.gov.

NOTE TO VENDORS:

Offers received without the entire completed three-page RIVIP Generated Bidder Certification Form attached may result in disqualification.

THIS PAGE IS NOT A BIDDER CERTIFICATION FORM

SECTION 1 - INTRODUCTION

The Rhode Island Department of Administration, Division of Purchases, on behalf of the Rhode Island Office of Energy Resources (“OER”), is seeking qualified vendors, with deep expertise in market research, data analysis, impact modeling, policy analysis, stakeholder engagement, facilitation, and strategic planning, to serve as the lead contractor for the preparation of the “Rhode Island Renewable Thermal Market Development Strategy” in accordance with the terms of this solicitation and the State of Rhode Island’s General Conditions of Purchase, which may be obtained at the Rhode Island Division of Purchases website at www.purchasing.ri.gov.

To access the State’s General Conditions of Purchase, enter our website, then click on Rules and Regulations. Once the Rules and Regulations are displayed, scroll to the bottom of the page and double click on Appendix A, which contains the State’s General Conditions of Purchase.

This is a Request for Proposals, not an Invitation for Bid. Responses will be evaluated on the basis of the relative merits of the proposal, in addition to price; there will be no public opening and reading of responses received by the Division of Purchases pursuant to this Request, other than to name those offerors who have submitted proposals.

SECTION 2 – INSTRUCTIONS AND NOTIFICATIONS TO BIDDERS

Potential Respondents are advised to review all sections of this solicitation carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.

Proposals which depart from or materially alter the terms, requirements, or scope of work defined by this solicitation will be rejected as being non-responsive.

All costs associated with developing or submitting a proposal in response to this solicitation, or to provide oral or written clarification of its content shall be borne by the Respondent. The State assumes no responsibility for these costs.

Proposals are considered to be irrevocable for a period of not less than sixty (60) days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.

Proposals misdirected to other State locations or which are otherwise not present in the Division of Purchases at the time of opening for any cause will be determined to be late and will not be considered. For the purposes of this requirement, the official time clock is in the reception area of the Division of Purchases.

All pricing submitted will be considered to be firm and fixed unless otherwise indicated herein. It is intended that an award pursuant to this Request for Proposals will be made to a prime contractor(s) who will assume responsibility for all aspects of the work. Joint ventures shall be considered, so long as the contractor’s duties and responsibilities are clearly articulated in such

form as acceptable to the State. Subcontractors are permitted, provided their use is clearly indicated in the offeror's proposal and the subcontractor(s) to be used are identified in the proposal.

All proposals should include the vendor's FEIN or Social Security number as evidenced by a W9, downloadable from the Division's website at www.purchasing.ri.gov.

The purchase of services under an award made pursuant to this RFP will be contingent on the availability of funds.

In accordance with Title 7, Chapter 1.2 of the General Laws of Rhode Island, 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 Secretary of State (401-222-3040). *This is a requirement only of the selected bidder.*

Respondents are advised that all materials submitted to the State of Rhode Island for consideration in response to this RFP will be considered to be public records, as defined in Title 38 Chapter 2 of the Rhode Island General Laws, without exception, and will be released for inspection immediately upon request, once an award has been made.

Interested parties are instructed to peruse the Division of Purchases website on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP.

The Respondent should be aware of the State's Minority Business Enterprise (MBE) requirements, which address the State's goal of ten percent (10%) participation by MBE's in all State procurements. For further information, contact the MBE Administrator, at (401) 574-8253 or visit the website at www.mbe.ri.gov. Upon tentative selection, all applicants are required to submit an MBE plan to the MBE office and shall demonstrate good faith efforts to achieve MBE participation.

Equal Employment Opportunity (RIGL 28-5.1) § 28-5.1-1 Declaration of policy. – (a) Equal opportunity and affirmative action toward its achievement is the policy of all units of Rhode Island state government, including all public and quasi-public agencies, commissions, boards and authorities, and in the classified, unclassified and non-classified services of the state employment. This policy applies in all areas where the state dollar is spent, in employment, public service, grants and financial assistance, and in state licensing and regulation. For further information, contact the Rhode Island Equal Employment Opportunity Office, at 222-3090 or via email Raymond.lambert@doa.ri.gov.

SECTION 3 – PROJECT DESCRIPTION

RFP – CONSULTANT SERVICES: RHODE ISLAND RENEWABLE THERMAL MARKET DEVELOPMENT STRATEGY

The Rhode Island Office of Energy Resources (“OER”) is requesting proposals from qualified consultants to serve as the lead contractor for the preparation of the “Rhode Island Renewable Thermal Market Development Strategy”.

OER seeks consultant(s) with deep expertise in market research, data analysis, impact modeling, energy policy analysis, stakeholder engagement, facilitation, and strategic planning.

Applicants may be individuals, sole proprietors, professional consultants or companies with multiple employees. Proposals may be submitted by firms, individuals, or as a team with more than one firm or individual to provide the necessary breadth of skills to complete the scope of work.

The selected consultant will work closely with OER and a Task Force with representatives from state agencies/councils, delivered fuels companies, renewable thermal companies, and other industry stakeholders.

The selected consultant will be responsible for performing the tasks specified within the scope of work outlined in this solicitation.

BACKGROUND

In 2013-2014, OER developed a 10-year update to the Rhode Island State Energy Plan (“RISEP”). This process helped illuminate important gaps in Rhode Island’s energy policy. In particular, the RISEP highlighted the thermal sector as a key area of opportunity for diversifying the state’s energy supply, providing economic benefits to consumers and businesses, and achieving greenhouse gas reductions. The thermal sector¹ accounts for approximately one third of Rhode Island total energy consumption, representing \$1.1 billion in annual expenditure on heating fuels² and nearly four million tons in carbon dioxide emissions. Yet, virtually all clean energy policies and programs in Rhode Island have focused on electric sector technologies to date.

In order to tap consumer, economic, and environmental benefits in the thermal sector, the RISEP presented the following strategies for Rhode Island policy makers to consider:

1. **Expand Least-Cost Procurement to Unregulated Fuels** - Develop a long-term strategy for sustainably funding energy efficiency programs for delivered fuels customers;

¹ Rhode Island’s thermal sector comprises energy consumed in residential and commercial buildings primarily for space and water heating, and industrial sector fuel consumption to generate process heat.

² The major fuels used in Rhode Island’s thermal sector include natural gas and delivered fuels. Delivered fuels are petroleum-based heating fuels, chiefly home heating oil, propane, and kerosene. Delivered fuels currently supply about 38% of Rhode Island’s thermal sector’s energy needs, with most of the remainder supplied by natural gas.

2. **Mature the Renewable Thermal Market** - Implement a market development strategy to stimulate increased adoption of renewable thermal fuels; and
3. **Expand Use of Biofuels** - Increase the biodiesel content of distillate fuel blends used by Rhode Island’s thermal and transportation sectors.

To address strategy #1—the need for a comprehensive strategy to invest in delivered fuels energy efficiency in Rhode Island—OER established a Rhode Island Thermal Working Group in early 2014. The Thermal Working Group sought to better understand what a potential Least-Cost Procurement investment strategy in Rhode Island’s delivered fuels sector could look like. In Summer 2015, the Working Group completed a report assessing the potential size of the delivered fuels energy efficiency market, models for delivering the efficiency services, and strategies to provide adequate funding. The Working Group report set out recommendations that further informed the scope of work in this solicitation. The Working Group report can be found on the OER website at the following link: <http://www.energy.ri.gov/efficiency/thermal/>.

OER has issued this solicitation in order to retain consultant assistance to address strategy #2 (and to a lesser extent, #3). The RISEP identified renewable thermal technologies—such as highly efficient cold climate heat pumps, ground-source heat pumps, wood/wood pellets, solar thermal, and biofuels—as technologies with the potential to offer lifecycle cost-savings compared to some of the other heating fuels used in Rhode Island, primarily electric resistance heating and delivered fuels. The final report developed through this project will be submitted to the Rhode Island General Assembly as part of OER’s requirement to issue findings and recommendations to promote the development of markets for alternative thermal fuels³.

The purpose of this solicitation is to select a consultant to lead the drafting of the “Rhode Island Renewable Thermal Market Development Strategy” (“the Strategy”). The Strategy will outline a market development strategy for Rhode Island’s renewable thermal sector, including market growth potential, market barriers, possible policy options, and the role of fuel dealers. The selected consultant will also facilitate any stakeholder participation in the effort through the Task Force and/or through other stakeholder engagement through this project.

SCOPE OF WORK AND DELIVERABLES

OER seeks consulting support for developing a market development strategy for Rhode Island’s renewable thermal sector. Respondents may require expertise in some or all of the following areas: market research, data analysis, impact modeling, energy policy analysis, stakeholder engagement, facilitation, and strategic planning.

The section below lists the project tasks that OER has identified. If respondents identify a need for additional tasks or work activities, they may indicate such additions in their project proposals. As respondents develop proposed approaches for all the tasks listed, OER would like respondents to contemplate the following: OER seeks to strike a balance between the following considerations:

³ Senate Resolution S 1020: <http://webserver.rilin.state.ri.us/BillText/BillText15/SenateText15/S1020.pdf>

- developing data that is sufficiently detailed for input into policy analysis and informing ultimate direction of programs, while
- shying away from analysis (primary data collection, potential modeling, or otherwise) that goes into too much detail to provide substantial marginal value to the effort, and
- avoiding replication of other analyses or sources from other jurisdictions (e.g. Massachusetts or other New England states) where such data may be transferrable in some capacity to Rhode Island.

OER will seek guidance from the selected consultant in strategically concentrating effort on high impact areas of the project.

The final deliverables for this project will include the following:

- *A final written report, entitled “Rhode Island Renewable Thermal Market Development Strategy”. The report will contain the results, findings, and recommendations emerging from the research, analysis, and stakeholder engagement outlined in the tasks contained in this solicitation.*
- *A final MS PowerPoint slidedeck presentation summarizing the key results, findings, and recommendations of the Strategy. The presentation will be provided to the Project Team for use following the conclusion of the contract with the selected consultant.*
- *Any spreadsheet data and/or work products that may emerge from the analysis documenting assumptions and results.*
- *Following completion of the report, up to three (3) presentations by the selected consultant to policymakers, legislators, and/or stakeholder groups on the key results, findings, and recommendations of the Strategy.*

OER expects the selected consultant to facilitate a series of in-person meetings of the Task Force throughout the course of this project. The purpose of the meetings will be to allow OER and the Task Force members to participate in the development of the Strategy and provide feedback on key draft work products and deliverables. Respondents should propose a draft schedule and agenda topics for stakeholder meetings in their proposal.

For each task, OER expects an advance opportunity to review the selected consultant’s proposed assumptions, methodologies, and/or approaches, as well as a minimum of one review opportunity to provide comments and revisions to draft materials. For tasks that involve stakeholder engagement, the selected consultant must provide draft materials, presentations, and/or documents to OER a minimum of one week in advance of any stakeholder meeting. For the final report, OER expects the opportunity for up to two rounds of review and revision.

PROJECT TASKS

OER has identified the following tasks that require consultant services:

Task 1: Refine goals and information needs

OER anticipates working with the selected consultant at the outset to further refine the strategic direction of the project. In consultation with OER, the selected consultant should finalize a list of goals for the project, including a list of research/policy questions to be answered, and obtain client agreement on it.

Task 2: Identify market growth potential and targets for renewable thermal technologies

OER would like to better understand the current status and future potential of Rhode Island's renewable thermal market. A major purpose of this effort is to gather the necessary information to support the modeling of possible policy options for promoting renewable thermal technologies going forward (Task 4).

A few existing data sources are available. The RISEP contains very high-level data on Rhode Island's renewable thermal market, however, this data is limited in terms of direct policy or program application⁴. Some additional data on Rhode Island's thermal sector and delivered fuels market was developed for the Thermal Working Group report—consumption patterns, distribution of customer types, end-use equipment technologies and other key market characteristics.

The selected consultant should review the existing available data and propose an approach for: (1) characterizing Rhode Island's current renewable thermal market, (2) quantifying market growth potential, and (3) proposing deployment targets for renewable thermal technologies.

Below are examples of some of the questions OER would like to answer through this task. As stated above, OER will seek guidance from the selected consultant on the level of detail for addressing each of these questions based on the value for addressing project objectives:

- What are the current and future market niches for different renewable thermal technologies in Rhode Island (e.g. end-use applications for space heat/water heating/process heat; most common customer sectors/segments including single/multifamily, commercial & industrial, etc.; geography including proximity to gas mains; existing fuel types, supplemental heat/primary heat)?
- How many of these systems currently exist for each technology? What is the split among different customer sectors/segments? How much renewable thermal energy is currently generated in Rhode Island?
- How many of these systems could exist given market trends and/or more state support?

⁴ Additionally, the RISEP did not consider several important renewable thermal technologies in the scenario modeling, namely cold climate heat pumps and wood/wood pellets.

- Can the State establish reasonable quantitative goals for market growth over the next five (5) or ten (10) years (e.g. deployment targets for number of installations or MMBtu/kWh produced from different technologies)?

Task 3a: Identify strategies to address renewable thermal market barriers, with a focus on workforce training needs and business development opportunities

Other studies⁵ have identified key renewable thermal market barriers, most notably: high capital costs, lack of policy support, poor public awareness, opaque regulatory standards, and workforce development. OER would like to gain a better understanding of the specific barriers impeding the adoption of renewable thermal for each technology and in different sectors. The selected consultant should propose an approach to identify key barriers and propose strategies to address the barriers. In particular, OER is focused on workforce training needs and business development opportunities in the renewable thermal industry in Rhode Island. Some examples of questions OER would like to answer include:

- For each technology, how many companies currently provide installation and maintenance services? Some high-level data will be available from Rhode Island’s recently completed Rhode Island 2015 Clean Energy Industry Report.
- What key gaps, if any, exist in the supply chain for certain technologies (e.g. wood pellets)?
- What types of workforce training are needed for the industry?

OER anticipates that some component of this task will involve direct engagement with applicable industry stakeholders as part of this task (e.g. through focus groups, surveys, interviews, stakeholder presentations/events, etc.).

Task 3b: Prepare a “Rhode Island Fuel Dealers Clean Energy Industry Opportunities Report”

In tandem with Task 3a, the selected consultant will examine specific opportunities and barriers for Rhode Island’s fuel dealer industry to participate in the growing renewable thermal market and clean energy industry more generally (e.g. including energy efficiency and other renewable energy technologies). Rhode Island’s fuel dealer industry faces challenges including declining sales, consolidation, and competition from natural gas. However, from the State’s perspective, fuel dealers can be valuable partners in driving Rhode Island to a secure, cost-effective and sustainable energy future. Fuel dealers’ customer relationships, delivery infrastructure, and technical skills are assets in the new clean energy economy. Furthermore, some renewable thermal technologies may also require a similar delivery infrastructure to delivered fuels; energy service companies are still needed to install, service and, in the case of pellets and biofuels,

⁵ E.g. <http://www.mass.gov/eea/docs/doer/renewables/thermal/carts-report.pdf>

deliver fuel. The selected consultant will work with OER and the fuel dealer industry to craft a collaborative vision and action plan for the RI fuel dealer industry of the future.

The selected consultant will lead the development of a mutually-beneficial vision and roadmap for fuel dealers to participate as active partners in the State's efforts to extend the benefits of energy efficiency, renewable thermal and other clean heating options to all consumers. OER envisions that the selected consultant will draw on direct engagement with fuel dealers as part of this task (e.g. through focus groups, surveys, interviews, stakeholder presentations/events, etc.). This effort may involve some or all of the following elements:

- **Identify new business opportunities for fuel dealers that align with state energy, economic, and environmental policy goals.** These opportunities could include energy efficiency, renewable thermal/clean heat, or other renewable energy technologies.
 - Which opportunities are the most promising?
 - Which areas are best suited to the fuel dealer business model?
 - Which areas are best suited for “full service” versus “delivery only” fuel dealer companies?
 - What opportunities exist for energy efficiency services versus renewable thermal?
 - Which renewable thermal technologies offer the most promise?
 - Which areas are of greatest interest to fuel dealers?
 - Are fuel dealers hearing any demand from their customers for clean heating technologies and if so, what do their customers want?

- **Identify resources and support are needed to enable fuel dealers to pursue these new business opportunities.**
 - Are there fuel dealers in Rhode Island who have already entered new energy efficiency or renewable thermal markets?
 - What success have they seen and what barriers have they encountered?
 - What would it take for fuel dealers who are interested but have not yet expanded their business to take the next step?
 - What are some examples of models from other states/jurisdictions/world economies where successful efforts were made to support fuel dealers entering new clean energy businesses?
 - What educational, training, or technical infrastructure would be needed in Rhode Island? (How do these findings align with the findings from Task 3?)
 - Are any of these resources available through existing channels?
 - If not, how could they be established and what would it take?
 - What are actionable next steps?

- **Based on the vision and opportunities, develop a two-year action plan with recommendations and concrete outcomes.**

Task 4: Identify policy options and model impacts

OER would like to gather data and information to support the development of policy recommendations for growing a renewable thermal market in Rhode Island. OER anticipates this task as likely requiring a more detailed level of analysis. OER would like the results of the analysis for this task to be presented at a level of rigor that could be ultimately used to advance policy initiatives.

The selected consultant will identify a suite of potential policy options for promoting renewable thermal energy technologies in Rhode Island, with input from OER and the Task Force. These policy options could include, but are not limited to, tax incentives, rebates/grants, an “RPS” for renewable thermal technologies, or bioblend requirements. The selected consultant should propose a set of criteria for evaluating the merits of each option. The consultant will describe how well each option meets the criteria. The criteria could include, but would not be limited to:

- Market growth potential and/or technology deployment targets established in Task 2
- Sustainability and scalability
- Balancing short-term costs with long-term benefits
- Minimizing cross-subsidization among users of different fuels when sourcing funding
- Suitability for promoting the full range of different renewable thermal technologies (e.g. a bioblend requirement would only support biofuels, not other technologies; a performance-based incentive might be helpful for some technologies, but not as helpful for those for which customers perceive upfront system costs as the primary barrier).
- Effectiveness at addressing the major market barriers to renewable thermal technologies
- Political viability

As part of this task, the selected consultant should examine which policy options have proved most promising in other jurisdictions and demonstrated success. As part of this task, the selected consultant must consult with the Project Team to propose a thoughtful and intuitive approach for addressing the fact that renewable thermal technologies have traditionally been promoted under a variety of distinct programs and policies (e.g. heat pumps within the utility-administered ratepayer energy efficiency program; biofuel within the state-mandated bioblend requirement; solar thermal within the Commerce RI Renewable Energy Fund small solar incentive program, etc.).

The selected consultant will consult with OER and the Task Force to select a set of up to three (3) preferred policy options for further detailed analysis. The consultant will model the impacts of implementing the preferred policy options. The consultant will then report on and analyze metrics including, but not limited to:

- Net economic costs and benefits to the Rhode Island economy;
- Fiscal/ratepayer impacts;
- Net job creation impacts;
- Greenhouse gas emissions reductions; and
- Any other metrics recommended by the selected consultant and agreed upon by the client

All modeling inputs, outputs, assumptions, and details should be presented to and agreed upon with OER and the Task Force.

Finally, the selected consultant will prepare an overview analysis of key issues and considerations for each preferred policy option. The analysis should review major policy design and implementation considerations, highlighting key areas for policymakers and implementers to understand as they consider pursuing different options.

TIMELINE

Below is an estimated overview of the timeline for the encompassed work.

Milestone	Elapsed	Estimated Dates
RFP Release Date		October 13, 2015
Deadline to Submit Questions		October 23, 2015
Notification of Intent to Bid (preferred, not required)		November 2, 2015
Proposal Due Date	4 weeks	November 10, 2015
Proposal Award Date	4 weeks	December 8, 2015
Tasks 1 – 4 Complete	5 months	May 9, 2016
Deadline for Draft Report	4 weeks	June 6, 2016
Review and Revision Period	2 weeks	June 20, 2016
Deadline for Final Report	2 weeks	July 5, 2016

SECTION 4 – PROPOSAL REQUIREMENTS

General Submission Requirements

Questions concerning this solicitation may be e-mailed to the Division of Purchases at gail.walsh@purchasing.ri.gov no later than the date and time indicated on page one of this solicitation. Please reference RFP #7549964 on all correspondence. Questions should be submitted in a Microsoft Word attachment. Answers to questions received, if any, will be posted on the website as an addendum to this solicitation. It is the responsibility of all interested parties to download this information. If technical assistance is required to download, call the Help Desk at (401) 222-3766 or lynda.moore@doit.ri.gov.

Offerors are encouraged to submit written questions to the Division of Purchases. No other contact with State parties will be permitted. Interested offerors may submit proposals to provide the services covered by this Request on or before the date and time listed on the cover page of this solicitation. Responses received after this date and time, as registered by the official time clock in the reception area of the Division of Purchases will not be considered.

Responses (an original plus four (4) copies) should be mailed or hand-delivered in a sealed envelope marked “**RFP # 7549964, Consultant Services: Rhode Island Renewable Thermal Market Development Strategy**” to:

RI Department of Administration
Division of Purchases, 2nd floor
One Capitol Hill
Providence, RI 02908-5855

NOTE: Proposals received after the above-referenced due date and time (first page of this solicitation) will not be considered. Proposals misdirected to other State locations or which are otherwise not presented in the Division of Purchases by the scheduled due date and time will be determined to be late and may not be considered. Proposals faxed or emailed to the Division of Purchases will not be considered. The official time clock is located in the reception area of the Division of Purchases.

Proposals should include the following:

- A completed and signed three-page RIVIP Bidder Certification Cover Form, available at www.purchasing.ri.gov.
- A completed and signed W-9 (taxpayer identification number and certification). Form is downloadable at www.purchasing.ri.gov. **Please include with original proposal only.**
- A **separate Technical Proposal** describing the qualifications and background of the applicant and experience with and for similar projects, and all information described in this solicitation.

- In addition to the multiple hard copies of proposals required, Respondents are requested to provide their proposal in electronic format (CD-Rom, disc, or flash drive). Microsoft Word / Excel or .pdf format is preferable. Only 1 electronic copy is requested and it should be placed in the proposal marked “original.”
- **A separate, signed and sealed Cost Proposal** reflecting the hourly rate, or other fee structure, proposed to complete all of the requirements of this project.

Proposal submissions should address the vendor’s approach to the tasks outlined in the scope of work. All proposals submitted for this request must be submitted in the format described below, clearly labeling the sections as described. Please keep fonts to 11 point at a minimum. Proposals should be kept to a maximum of twenty (20) pages (at 1.5 line spacing) including all sections listed below:

1. Overview

The Overview will concisely lay out the applicant’s understanding of the scope of work, describe their proposed approach and explain how they are well suited to perform the tasks.

2. Technical Proposal

Discuss your solution to the proposed scope of work. Include a description of your approach to each task listed in the scope of work. Indicate your ability to complete the scope of work within the established timeframe and provide a proposed schedule of deliverables/project milestones.

3. Qualifications & Experience

Please provide the following:

- **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 recommending and implementing solutions to the scope of work outlined in this solicitation.
- **Relevant Experience:** Describe your experience with similar projects. Respondents familiar with the New England region are desirable.
- **Examples of Prior Work:** If possible, reference two or three examples of previous projects that best display your ability and experience with work of a similar nature and specify the role your firm played in each project.
- **Reference Information:** Provide names, addresses, telephone numbers and permission to contact two former or current clients for which your organization has performed work in the last three years.

4. Project Management & Organization

List all staff and/or subcontractors proposed as members of the consultant team and the tasks they will perform on the account. Describe their duties, responsibilities, and concentration of effort applying to each. Please include resumes, curricula vitae or statements of prior experience and qualification (these may be provided as attachments not counting towards overall page limit). An organizational chart showing roles and responsibilities on the project is desirable. The consultant team may include subcontractors; however, the prime respondent will be solely responsible for the management and work-products of the consultant team.

5. Cost Proposal

Please provide a **separate, signed sealed Cost Proposal** reflecting one, all-inclusive price for the scope of service. **It is anticipated that the total budget available for the scope of work outlined in this solicitation will likely be between \$125,000 and \$215,000.** The maximum budget is inclusive of contractor expenses, including travel. These costs should be indicated as a separate line item. Please also include the following, by task and for each staff and/or subcontractor proposed as members of the project team: estimated personnel hours, level of effort, hourly billing rates, other direct costs, and any other relevant information.

SECTION 5 – EVALUATION AND SELECTION

Proposals will be reviewed by a Technical Review Committee comprised of staff from state agencies. To advance to the Cost Evaluation phase, the Technical Proposal must receive a minimum of 60 (85.7%) out of a maximum of 70 technical points. Any technical proposals scoring less than 60 points will not have the cost component opened and evaluated. The proposal will be dropped from further consideration.

Proposals scoring 60 technical points or higher will be evaluated for cost and assigned up to a maximum of 30 points in cost category, bringing the potential maximum score to 100 points. OER reserves the exclusive right to select the individual(s) or firm (vendor) that it deems to be in its best interest to accomplish the project as specified herein; and conversely, reserves the right not to fund any proposal(s).

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

Scoring Criteria	Description	Possible Points
Technical Proposal	<ul style="list-style-type: none"> The quality of the Proposal demonstrates the candidate’s ability to provide superior expertise for developing a Renewable Thermal Market Development Strategy for Rhode Island The proposed approach meets the needs and criteria set forth in the RFP 	35
Qualifications & Experience	<ul style="list-style-type: none"> The candidate has completed similar projects and is qualified to undertake the scope of work outlined in the RFP References and prior work demonstrate the candidate’s ability to provide superior market research, data analysis, impact modeling, policy analysis, stakeholder engagement, facilitation, and strategic planning 	25
Project Management & Organization	<ul style="list-style-type: none"> Proposal shows clarity of team management structure, the availability of senior staff to supervise and contribute to the work, and ability to complete deliverables in a timely fashion 	10
Total Possible Technical Points		70
Cost Proposal*	<ul style="list-style-type: none"> The candidate submits a reasonable and competitive pricing structure commensurate with the value offered 	30
Total Possible Points		100

*The low bidder will receive one hundred percent (100%) of the available points for cost. All other bidders will be awarded cost points based upon the following formula:

(low bid / vendor's bid) * available points

Points will be assigned based on the offeror's clear demonstration of his/her abilities to complete the work, apply appropriate methods to complete the work, create innovative solutions and quality of past performance in similar projects.

Applicants may be required to submit additional written information or be asked to make an oral presentation before the technical review committee to clarify statements made in their proposal.

CONCLUDING STATEMENTS

Notwithstanding the above, the State reserves the right not to award this contract or to award on the basis of cost alone, to accept or reject any or all proposals, and to award in its best interest.

Proposals found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further.

The State may, at its sole option, elect to require presentation(s) by offerors clearly in consideration for award.