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November 15, 2018

ADDENDUM # 3

Bid # 7597562

Title: Energy Efficiency Programs Evaluation Study

Bid Closing Date & Time: November 27, at 2:00 PM (Eastern Time)

Notice to Vendors:

1. Update to scoring processes and revenue points formula – see attached document
2. Answers to questions – see attached

**Kathy Missell
Chief Buyer**

Interested parties should monitor this website, on a regular basis, for any additional information that may be posted.

Bid # 7597562

Title: Energy Efficiency Programs Evaluation Study

Evaluation Scoring Revised

Notice to Vendors:

1. The Revenue Points formula on page 18 of the solicitation has been changed to the following:

If a vendor is able to submit a proposal with a \$0 evaluation contract amount from 2012-2017 with National Grid RI and MA, that proposal will receive all five (5) possible points in the evaluation contract scoring category. The formula for allocating points among the other proposals will be as follows:

$$\text{(lowest non-zero contract amount / non-zero applicant's contract amount)} * (\text{available points} - n)$$

Where $n = (\text{available points} / \text{highest contract amount}) * (\text{lowest non-zero contract amount})$

2. The following requirement and scoring process applies to the "Risk mitigation strategy for conflicts of interest..." shown in the scoring criteria table on page 17 of the solicitation:

No matter the evaluation and program implementation contract amounts submitted on the Conflict of Interest Form, a risk mitigation strategy must be submitted with a proposal. A risk mitigation strategy that indicates no current or expected, future conflicts will receive all five (5) possible points in the risk mitigation strategy scoring category.

Questions & Answers for Potential Vendors

A. Received Verbally at the Mandatory Pre-Bid Meeting:

1. *How are points allocated based on current/historical contracts with RI and MA National Grid?*

It is required that a team submitting a proposal has held total *evaluation* contract amounts from National Grid RI and MA cumulative over 2012-2017 for less than \$3Million. It is also required that a team submitting a proposal has held total *program implementation* contract amounts from National Grid RI and MA cumulative over 2012-2017 for less than \$3Million. If both of these required criteria are met, a team is eligible to submit a proposal for this RFP.

All submitted proposals must have a completed Conflict of Interest form as part of the proposal. On the Conflict of Interest form, the team must disclose their total evaluation and implementation contract amounts with National Grid RI and MA over 2012-2017 (the evaluation contract amount and implementation contract amount must be separately listed).

Additional points (up to 5 points) are given to teams who have low *evaluation* contract amounts. The formula used to determine the additional points is as follows:

(lowest evaluation contract amount / applicant's evaluation contract amount) x (5 possible points)

No additional points are allocated for low *implementation* contract amounts, but the requirement of less than \$3Million in program *implementation* contract amounts with National Grid RI and MA over 2012-2017 must be met.

2. *Is there a page limit for the proposal?*

Yes, the page limit is described on page 19 of the Request for Proposals (RFP): "The technical proposal is limited to fifteen (15) pages (this excludes any appendices and as appropriate, resumes of key staff that will provide services covered by this request)."

The RIVIP Bidder Certification Cover Form, the RI W-9 form, ISBE proposal, and cost proposals do not count towards this page limit.

3. *How many copies of the proposal are required to be submitted?*

On page 19 of the RFP, there are specific instructions on the number of copies needed: "One (1) Electronic copy on a CD-R... One (1) printed paper copy, marked "Technical Proposal – Original" and signed...[and] Four (4) printed paper copies."

4. *How should a vendor ensure that a mailed-in proposal is properly routed and arrives on time?*

It is strongly recommended that any mailed proposals are sent via tracked mail and are scheduled to arrive at least one day before the submission deadline. Since mail is often delivered to the mailroom in the building and then needs to be delivered to the State Purchasing

department to be officially received, it is strongly recommended that at least a one-day buffer is used to ensure delivery prior to the submission deadline.

Please use the mailing address listed on page 21 of the RFP to ensure proper delivery.

5. *Can you briefly speak to the possible objectives of the legislature in requiring this study?*

For more information, please see the legislative language included in the RFP on pages 7-8. You can also visit this webpage to view the entire statute as amended by the Legislature:

<http://webserver.rilin.state.ri.us/BillText/BillText18/SenateText18/S2500B.pdf>

6. *Why is a required billing analysis part of the RFP?*

As stated in the Legislation, "At a minimum the study performed by the office of energy resources shall include the following in its scope of work: (ii) Conduct an independent review of gas and electricity efficiency programs, which may include billing analysis techniques..."

After careful negotiations with the Working Group conducting a billing analysis was determined to a necessary part of the project. Please see task #3 starting on page 12 of the RFP to review the required scope of work related to billing analysis.

7. *Is it expected that this evaluation work will be a one (1) year/ one (1) time effort?*

The legislation requests one study; see legislation at

<http://webserver.rilin.state.ri.us/BillText/BillText18/SenateText18/S2500B.pdf>.

8. *When would be the tentative contract start date?*

The goal is to have a contract start date sometime between late December 2018 and early February 2019.

9. *Does signing the Conflict of Interest Form also place a limitation on future work with National Grid RI and/or MA?*

Signing the Conflict of Interest Form does not place a limitation on future work with National Grid. The Office of Energy Resources will work through any possible conflict of interest concerns with the selected vendor during contract negotiations.

10. *The RFP requires a pre/post billing analysis of a Commercial & Industrial electric program to qualify a potential vendor. Can this requirement be fulfilled with experience in studies that focus on facility-level billing analysis? Or must an entire program have been evaluated with only billing analysis?*

The Proposal Review Committee will accept proposals from teams with only facility-level experience in billing analysis. However, teams with limited qualifications should expect to lose points in the “Demonstrated expertise, experience, competence, and qualifications” scoring category.

B. Received via Email to State Purchasing:

1. *Would being selected and contracting for this role of serving as an energy savings and verification consultant in Rhode Island preclude the vendor from accepting energy efficiency evaluation work in Massachusetts to which National Grid is a party or sponsor due to perceived conflict?*

Please see answer to question #A. 9 above.

2. *How do firms with no ties in past 5 years get any points for these two items?*
 - *Page 17 Proposal Evaluation Table, last two technical points items – if the goal is to hire a firm with no ties in past 5 years, then these 10 points do not help as the way the revenue points formula is structured, a firm with no conflicts gets zero points.*

Contract amounts from page 26, Conflict of Interest Form.

- *If you have no conflicts, you do not need a risk mitigation strategy...so would assume you get 5 points, but...??!! I would have expected bonus points for no conflict.*
- *It is also weird that the COI Form asks for both evaluation and implementation contracts amounts but the Table highlights only evaluation \$ considered.*

Combined <i>evaluation</i> contract amounts from National Grid RI and National Grid MA cumulative over 2012-2017 for the prime contractor (only direct revenue derived from National Grid) and all subcontractors on the proposed project team***	5
Risk mitigation strategy for conflicts of interest is clear, thoughtful, and appropriate	5

*****Revenue Points:**

Each bidder will be allocated points based on the following formulas:

$$(\text{lowest contract amount} / \text{applicant's contract amount}) \times \text{available points}$$

Note that the contract amount is the sum of all contract amounts over 2012-2017 for contracts with both National Grid RI and National Grid MA in aggregate for the prime and all sub-contractors on the bidder's proposed project team.

From COI Form:

2. Combined <i>evaluation</i> contract amounts from National Grid RI and National Grid MA cumulative over 2012-2017 for the prime contractor (only direct revenue derived from National Grid) and all subcontractors on the proposed project team	\$ _____
3. Combined <i>program implementation</i> contract amounts from National Grid RI and National Grid MA cumulative over 2012-2017 for the prime contractor (only direct revenue derived from National Grid) and all subcontractors on the proposed project team	\$ _____

Please provide clarification on this assessment.

If a vendor is able to submit a proposal with a \$0 evaluation contract amount from 2012-2017 with National Grid RI and MA, that proposal will receive all five (5) possible points in the evaluation contract scoring category. The formula for allocating points among the other proposals will be as follows:

$$\text{(lowest non-zero contract amount / non-zero applicant's contract amount)} * (\text{available points} - n)$$

Where $n = (\text{available points} / \text{highest contract amount}) * (\text{lowest non-zero contract amount})$

This is a slight modification of the formula shown in the original RFP.

No matter the evaluation and program implementation contract amounts submitted on the Conflict of Interest Form, a risk mitigation strategy must be submitted with a proposal. A risk mitigation strategy that indicates no current or expected, future conflicts will receive all five (5) possible points in the risk mitigation strategy scoring category.

An amendment will be posted to the RFP clarifying this evaluation process.

3. *Is Smart meter data available?*

No, this data is not available.

4. *The RFP references the requirement of “at least one completed pre/post billing analysis of a Commercial & Industrial ELECTRIC program”. Must this requirement be fulfilled by a report in which the electric impacts of a C&I program in its entirety is evaluated via billing analysis, or does a sample EM&V study with significant facility-level billing analysis as a key and critical approach suffice?*

Please see answer to question #A. 10 above.

5. *Is there an estimated budget to complete this work?*

No budget will be provided for this solicitation. However, please review the scoring criteria on page 17 of the RFP and note that cost is considered as a significant part of the evaluation.

6. *Can you please share the budget for this RFP? If not, can you please provide insight on what the target budget range should be?*

Please see answer to question #B. 5 above.

7. *For the billing analysis, can interval data be provided? If so, is the data available in 1-hour interval format?*

Interval data is not available for most commercial and industrial customers at National Grid-Rhode Island. Fifteen minute or hourly interval data is available for larger customers above a certain kW threshold and can be supplied, but it should be assumed that, for a majority of program participants that may be used in a billing analysis, only monthly billing data will be available.

8. *Can you please provide insight on how data requests from the selected vendor will be processed, i.e., will OER submit data requests to National Grid on the vendor’s behalf or will the vendor have a direct line of communication with National Grid and its evaluators?*

A direct line of communication with National Grid will be provided. All data sharing and storage procedures will need to meet National Grid’s data management and security requirements.

9. *The RFP references the requirement of at least one completed pre/post billing analysis of a Commercial & Industrial ELECTRIC program. Must this requirement be fulfilled by a report in which a C&I program in its entirety is evaluated via billing analysis, or does EM&V with significant facility-level billing analysis as a key and critical approach suffice?*

Please see answer to question #A. 10 above.

10. *What is the maximum budget for this project, if any?*

Please see answer to question #B. 5 above.

11. What is the minimum budget for this project, if any?

Please see answer to question #B. 5 above.