



STATE OF RHODE ISLAND

ENERGY EFFICIENCY & RESOURCE MANAGEMENT COUNCIL

Request for Proposal: Policy & Program Planning Consultant

Submission Deadline: September 1, 2014, 4:00 PM (Eastern Time)

Questions concerning this solicitation must be received by the EERMC at eermc.rfp@gmail.com no later than 4:00 PM on August 25, 2014.

All questions received will be responded to within 48 hours of receipt.

Responses will be posted on the EERMC website.

All questions must be submitted in writing.

Proposals must be submitted via e-mail to eermc.rfp@gmail.com.

Proposals must be received at the email address above by 4:00 PM, on September 1, 2014.



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The Rhode Island Energy Efficiency and Resource Management Council (“EERMC”) is seeking the assistance of a technical consultant (“Consultant”) beginning on January 1, 2015 to provide planning and policy support to the EERMC in its review and oversight of the energy efficiency and system reliability programs and initiatives which are proposed and administered by the electric and gas utility distribution company as required by R.I.G.L. § 39-1-27.7.

The EERMC, a thirteen-member council appointed by the Governor with advice and consent of the Senate, includes nine voting representatives from 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 and municipal energy users. The four non-voting members include representatives from the electric and gas utilities, home heating oil 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.

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, including:

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.

The primary responsibility of the Consultant is to be a partner and project manager that ensures all goals are met and tasks are accomplished, enabling the EERMC to meet its statutory objectives and duties. The Consultant will provide critical services and support for EERMC priorities through the following roles and responsibilities:

Facilitating EERMC Oversight Responsibilities

- Coordinate 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.
- Actively participate and provide expertise in monthly EERMC meetings, Executive Committee meetings, Demand Collaborative Subcommittee meetings, System



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- Reliability Subcommittee meetings and other ad hoc committees that may be formed, and at technical sessions, hearings, and open meetings before the PUC.
- Develop and review policies on a range of issues germane to the EERMC's duties and functions 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 research, analysis and 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.
 - Assume overall responsibility for managing and coordinating the work of any additional consultants hired by the EERMC to support its objectives.
 - Evaluating the impacts of past and potential legislation on energy efficiency and system reliability, including, but not limited to, legislation related to decoupling.

EERMC Work Product Development and Representation

- Develop work products for relevant PUC dockets (eg.: annual natural gas and electric efficiency plans), including direct testimony on behalf of the EERMC upon its request.
- Provide technical support and representation with respect to relevant state and regional entities and policies, including the Rhode Island General Assembly and Executive branch, ISO-New England, the Regional Greenhouse Gas Initiative (RGGI), and the Forward Capacity Market (FCM).
- Support the development of the required Annual Report to the General Assembly on EERMC activities due on April 15 of each year.
- Represent the priorities of the EERMC in various relevant forum, including, but not limited to: codes and standards initiatives, the Alliance for Healthy Homes, Emerald Cities, RI Public Energy Partnership, and efforts to improve efficiency delivery to multifamily buildings, the farm and agriculture sector and income eligible consumers.
- Provide oversight of National Grid's investment of ratepayer funds, including monthly meetings with the company's strategy groups.

Energy Efficiency and System Reliability Program Design and Delivery

- Ensure that the EERMC's priorities are represented in the development of annual and triennial energy efficiency and system reliability plans.
- Ensure that energy efficiency program design and implementation are delivering excellent service and maximizing the benefits of energy efficiency for all ratepayers.



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- Advocate for program design and delivery improvements, including, but not limited to, providing recommendations for increasing the benefits of efficiency to under-served 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, year-end performance results and make recommendations for improvements.
- Advocate for excellent data reporting, transparency, and access to data when appropriate.
- Keep the EERMC apprised of developments in other states that could improve the quality 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 National Grid program managers and other affected stakeholders.
- Work with National Grid to receive more comprehensive and timely exchanges of relevant data that the EERMC or the OER may need.
- Monitor all energy efficiency funding available in Rhode Island to advance coordination and integration, such as RGGI and FCM funds.

Advancing Integrated Approaches and 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;
 - Financing;
 - Efficiency for delivered fuels;
 - Innovative delivery mechanisms and partnerships;
 - Performance metrics and incentives; and,
 - Other new or emerging issues.
- Document research and recommendations in the format most appropriate for the audience and purpose.
- Provide direct support to the OER in the form of training, planning and guidance for new initiatives, and relevant specialized expertise to assist the OER with existing programs



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and pilot programs, including programs identified in the OER's annual RGGI Allocation Plan.

- Provide direct support to the OER on renewable integration with energy efficiency (eg.: PACE Program)
- Research and planning for integrating and leveraging broader energy issues with ratepayer funded efforts.
- Provide any additional work on special projects on an as-needed basis.

Candidate qualifications include:

- A team of professionals with 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 in renewable energy programs and policies is also preferred.

The EERMC reserves the right, in 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 EERMC to be in the best interest of the ratepayers of the State of Rhode Island. The EERMC may decide to enter into agreements with one or more of the applicants with a contract between the applicants and the electric and natural gas distribution utility. Selected applicants will report directly and solely to the EERMC.¹ The EERMC reserves the right to discuss with the selected applicant(s) any terms and conditions, including financial issues, for any proposed project.

Candidates should submit a proposal including qualifications, prior experience, references, and proposed quarterly compensation, and a brief response (not to exceed ten pages) to the objectives and responsibilities detailed above. Applicants are not to have had any recent or current contracts, or other financial relationships, with National Grid and also must not have had

¹ The Consultant will provide monthly verbal and written reports of issues and work tasks from previous months at monthly open meetings of the EERMC. The Consultants will also provide verbal and written summaries of upcoming issues to be resolved. All reports will be provided electronically and archived at www.rieermc.ri.gov.



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any recent contracts with National Grid to avoid any real or perceived conflicts of interest. Any known potential conflict or financial relationship must be detailed and explained in the applicant's proposal. The consultant is expected to require a commitment of approximately 4,000 hours during the course of 2015 starting on January 1, 2015, with an option for the EERMC to decide whether to renew and continue the selected consultant's work for 2016 and 2017.