

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

May 12, 2022

Overview

The State of Connecticut Energy Efficiency Board (EEB) is seeking a team of technical consultants to support the EEB. The team should include the following roles:

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

The EEB is seeking proposals from consultant teams to fulfill all the consultant roles listed above. Teams should submit one proposal. Consultant team members can be part of the same organization, or they can be from different organizations. Proposals must identify a team leader.

The EEB, which advises the electric and gas utility distribution companies and oversees the C&LM programs, is a seventeen-member board that by statute includes representation from DEEP, the Office of the Attorney General, the Office of Consumer Council, statewide business, the environmental field, the manufacturing and agricultural sectors, retail organizations, chambers of commerce, municipalities, and low-income and retail customers. The EEB reports annually to the CT Department of Energy and Environmental Protection (DEEP) and the CT General Assembly.

CT legislation created the CT C&LM Plan and the EEB, as described in Connecticut General Statutes Section 16-245m. The C&LM Plan supports a variety of programs that provide financial incentives to help Connecticut consumers reduce the amount of energy used in their homes and businesses. C&LM programs are reviewed by the EEB, a group of advisors who utilize their experience and expertise with energy issues to consult with Connecticut's electric and natural gas utility companies on how programs should best be structured for and delivered to Connecticut consumers.¹

¹ See: <http://www.energizect.com/about/CEEF>

The C&LM Plan is supported by all Eversource and United Illuminating customers on their electricity bills through the Combined Public Benefits Charge; and by Connecticut Natural Gas, Southern Connecticut Gas Company and Eversource gas customers through a conservation charge included in their rates² (the Utilities).

The EEB is comprised of representatives of the DEEP, the Connecticut Office of Consumer Counsel, the CT Attorney General's Office, Utility companies, environmental organizations, and organizations or individuals representing the interests of residential, commercial, and industrial customers. The EEB advises and assists the Utilities in the development and implementation of comprehensive and cost-effective energy conservation and market transformation plans.³

The Utilities, as the program administrators of the C&LM Plan, submit a plan of energy efficiency programs to the EEB. The C&LM Plans are developed with the advice and assistance of the EEB and its consultants. The Utilities submit the final C&LM Plan to the EEB for vote and to the DEEP for the DEEP Commissioner's review and approval. All current and past C&LM Plan documents can be found [here](#).

State law CGS 16-245m charges the DEEP with the adoption of an independent, comprehensive program evaluation, measurement, and verification process. The EEB, through its Evaluation Committee, contracts with consultants who act as an Evaluation Administrator (EA). The EA advises the EEB regarding development of a schedule and plan for evaluations and oversees the implementation of the evaluation process.

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.

² Ibid.

³ Ibid.

The EEB seeks a Technical Consultant team that can provide technical input for development and review of goals, programs, and budgets; review and monitor program implementation, program performance and annual results; and provide technical support for policy and energy planning to maximize the value and usefulness of the Connecticut C&LM Program, thereby assisting Connecticut to achieve its objectives.

Work Scope, Responsibilities, and Qualifications of Consultant Positions

A description of each of the Consultant roles for this RFP is provided below. Each role includes an estimate of annual hours for that role. The estimates are based on the actual budgets of the EEB Technical Consultant team over the last few years. The estimates are provided only for the purpose of aiding bidders in their responses to this RFP. The bidder should provide their estimate of hours needed to perform each of the Consultant roles described in the RFP. The actual hours for each Consultant role could be modified during agreement negotiations between the winning bidder and the EEB. The actual hours may also be impacted by state budget factors and the evolving needs of the EEB over the lifetime of the agreement.

Senior Technical Consultant

Work Scope and Responsibilities:

- **Support EEB Meetings.** Serve as Board liaison, provide lead technical support and analysis, prepare and present materials for the EEB, 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 C&LM Plan, and support the EEB in its review of the goals, programs, and budgets. In 2022 and 2023, the planning process will be an annual update of the 2022-2024 C&LM 3-Year Plan. In 2024, the planning process will entail the development of the 2025-2027 C&LM 3-Year Plan. Analyze program plans, program designs, marketing, budgets and budget tables, revenues/funding, cost-effectiveness, goals and objectives, key performance indicators, performance incentives, and public input. Meet with the Program Administrators, and review/comment on draft plan documents and supporting data. Analyze C&LM goals and scenarios based on best practices and state comparisons early in the process.
- **Program Implementation, Monitoring, and Review of Results.** Review and monitor program implementation, review monthly reporting of public performance dashboard and quarterly reports, and review annual results. Provide support for, and meet with, others on cross-sector issues including gas integration, financing, marketing, and other issues. Provide input to the EEB

Evaluation Administrator on evaluation planning, and review studies, program savings documentation, and regional studies.

- 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 DEEP 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 the EEB on planning and issues related to the state's Comprehensive Energy Strategy, other statewide energy policies and related statewide energy/environmental policies (such as the Global Warming Solutions Act (GWSA)). Review and advise on ISO-New England energy efficiency forecasts, regional system forecasts, regional system plans, and winter/summer peak issues. Review and advise EEB on planning and alignment with the Governor's Council on Climate Change (GC3). Provide technical support to DEEP and EEB for development and deployment strategies under the Integrated Resource Plan (IRP). Review and provide technical input during development of the State's Comprehensive Energy Strategy (CES).
- Cost-Effectiveness and AESC/Avoided Costs. Provide technical assistance on cost-effectiveness and economic analysis, impacts from all fuels, avoided cost values, the regional avoided cost study (AESC), application of avoided cost values in Connecticut, GWSA benefits from C&LM and avoided cost of GWSA compliance, and other CT C&LM and energy policies.

Estimated Annual Hours: 820

Preferred Qualifications:

- A commitment to the mission and purpose of the CT Energy Efficiency Fund.
- Ten 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.
- Relevant degree required; technical degree preferred.

Residential Technical Consultant

Work Scope and Responsibilities:

- EEB Support. Provide Residential technical support for the EEB, including participation in monthly and other EEB meetings; coordination with the DEEP, the Utilities, 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. 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 C&LM Plan, and support the EEB and Residential Committee in its review of residential goals, programs, and budgets. In 2022 and 2023, the planning process will be an annual update of the 2022-2024 C&LM 3-Year Plan. In 2024, the planning process will entail the development of the 2025-2027 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: 765

Preferred Qualifications:

- A commitment to the mission and purpose of the CT C&LM Plan.
- Ten 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.
- Relevant degree required; technical degree preferred.

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 DEEP, the Utilities, 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. 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 C&LM Plan, and support the EEB and C&I Committee in its review of C&I goals, programs and budgets. In 2022 and 2023, the planning process will be an annual update of the 2022-2024 C&LM 3-Year Plan. In 2024, the planning process will entail the development of the 2025-2027 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: 995

Preferred Qualifications:

- A commitment to the mission and purpose of the CT C&LM Plan.
- Ten 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.
- Relevant degree required; technical degree preferred.

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: 50

Preferred Qualifications:

- A commitment to the mission and purpose of the CT C&LM Plan.
- Ten 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.
- Relevant degree required; technical degree preferred.

Administrative Estimated Annual Hours: 30

Cross-Sector Analysis Estimated Annual Hours: 225

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 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 quarterly 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 monthly as part of the invoicing

procedure.

Proposal Requirements and Timeline

This RFP does not commit the EEB to award a contract, pay any costs incurred in the preparation of a proposal in response to the RFP, or to procure or contract for services. The EEB reserves the right to accept or reject any or all proposals received because of this request, to negotiate with any or all qualified Contractors, or to cancel this RFP in part or in its entirety, if it is in their best interests to do so. 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.

The agreement terms and conditions for each Utility will be posted on the [RFP page of the EEB website](#). RFP responses should include either acceptance of the terms and conditions, or a written response on any exceptions to them. The Utilities will determine whether the exceptions can be accommodated.

Applicants should submit a proposal including: qualifications, prior experience, references, a response to the responsibilities detailed above, and a proposed budget with hourly and total compensation, estimated expenses, estimated administrative and support hours, overhead and/or management costs (if applicable), and 6% business service tax on labor (only for Connecticut residents who are consultants). Please limit proposals to 15 pages (the page limit does not include supporting reference materials such as resumes, project experience, budget details, etc.). Proposals should address team leadership and the interaction between the consultants. Applicants must not have any real or perceived conflicts of interest with Eversource Energy, United Illuminating, Connecticut Natural Gas, or Southern Connecticut Gas (or vendors that provide energy efficiency services to them), or with any EEB members or EEB Technical Consultants. Conflicts of interest shall be evaluated by the EEB on a case-by-case basis. Bidders should review the EEB's Operating Procedures to assure they understand the requirements as it relates to the roles and responsibilities of the Technical Consultants.

The start date for the Technical Consultants team is approximately October 1, 2022. Proposals should include scopes of work for October 2022 through December 2025. The EEB has the option to renew and continue the consultants' work past December 2025. Proposals should include pricing information for October - December 2022, and then annually from 2023 through 2025.

All questions or other correspondence regarding this RFP should be sent in writing to Emily Rice, EEB Executive Secretary, at executivesecretaryCTEEB@theenergygroup.biz. The timeline for this RFP is as follows:

Publication of RFP:	May 12, 2022
Intent to bid and questions on RFP due:	May 26, 2022
Answers to questions provided:	June 9, 2022
Proposals due:	June 30, 2022 (5:00 pm, EST)
Interviews conducted:	July/August 2022
Selection decision:	August 2022
Expected start date:	October 1, 2022

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) and posted on the [RFP page of the EEB website](#). All proposals should be submitted to the Executive Secretary via email.

Respondents who do not submit an intent to bid by May 26 can still submit proposals, but they will not be able to submit any questions on the RFP after May 26.