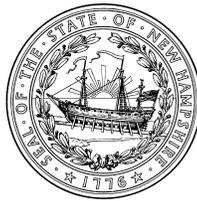


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February 2, 2018

RFP #2018-002
REQUEST FOR PROPOSALS
EM&V Oversight Consultant for Energy Efficiency Resource Standard

Prospective Consultants:

The New Hampshire Public Utilities Commission (NHPUC or Commission) is seeking proposals from qualified firms to provide advice on Evaluation, Monitoring, and Verification (EM&V) issues including, but not limited to, scope, methods, scheduling, how EM&V results inform program improvement, ISO-NE's forward capacity market evaluation requirements, and standardization of EM&V recording and reporting, as detailed in the April 2016 [Settlement Agreement](#) approved by Commission [Order 25,932](#)¹. Total funding available under this request for proposals (RFP) derives from revenues associated with the electric distribution utilities' System Benefit Charge (SBC) and the natural gas distribution utilities' Local Distribution Adjustment Charge (LDAC). The Commission anticipates that up to \$95,000 annually will be available for services procured through this RFP over three years (total \$285,000), starting in March 2018. The contract will be for three years, with an initial term ending December 31, 2018, and the Commission having two options to renew for one year period each, at the Commission's sole discretion.

Pertinent dates and information:

1. Electronic proposals must be received by the Commission no later than 4:30 p.m. on March 2, 2018. The electronic copy must be in PDF (portable document file) format.
2. Proposals should be submitted to:

Eunice Landry, Business Administrator
New Hampshire Public Utilities Commission
21 S. Fruit Street, Suite 10
Concord, NH 03301-2429
RFP@puc.nh.gov

¹ See Order No. 25,932: http://www.puc.nh.gov/Regulatory/Docketbk/2015/15-137/ORDERS/15-137_2016-08-02_ORDER_25932.PDF

3. In addition to the electronic submission, prospective bidders must submit five (5) additional paper copies to the address above, which must be postmarked no later than March 2, 2018.
4. Prospective consultants may submit written inquiries about this RFP by e-mail to RFP@puc.nh.gov no later than 4:30 p.m. EST on February 23, 2018. Inquiries and responses will be posted on the PUC's website at: www.puc.nh.gov/home/requestforproposal.htm. The subject line of the e-mail must state the following: RFP #2018-002, EM&V Oversight Consultant for Energy Efficiency Resource Standard.
5. Follow-up conferences/interviews will be scheduled as needed.
6. An Evaluation Team consisting of Commission staff and/or other qualified personnel will be established to evaluate responses (Proposals) to this RFP submitted by prospective consultants (proposers).

I. BACKGROUND

In June 2002, the New Hampshire electric utilities jointly developed and implemented a set of "core" energy efficiency programs (Core programs) that use the same eligibility requirements, design, etc. to ensure consistency among the utilities. The electric utilities include Liberty Utilities (Granite State Electric) Corp. d/b/a Liberty Utilities, New Hampshire Electric Cooperative, Inc. (NHEC), Public Service Company of New Hampshire d/b/a Eversource Energy, and Unitil Energy Systems, Inc. In December 2002, the two natural gas utilities (i.e., EnergyNorth Natural Gas, Inc. d/b/a Liberty Utilities and Northern Utilities, Inc.) developed and implemented a set of energy efficiency programs. The electric utilities and natural gas utilities are collectively referred to as the Utilities. The NHPUC Staff and the Utilities work collaboratively to prioritize the Monitoring and Evaluation (M&E) needs of New Hampshire. One of those areas identified as a priority was to establish a multi-year evaluation plan that addresses the needs of New Hampshire as well as the measurement and verification requirements of the ISO-NE Forward Capacity Market.

On November 1, 2000, the NHPUC issued Order No. 23,574 in DR 96-150: Order Establishing Guidelines for Post-Competition Energy Efficiency Programs. That Order directed the NH utilities to implement a "thoughtful and thorough monitoring and evaluation program," noting that "an assessment of energy efficiency programs and measures should analyze the effects of the programs and measures on removing and reducing market barriers or transforming the market for those products. Impact and process evaluations are important, as well."

On December 31, 2002, the NHPUC issued Order No. 24,109 in DG 02-106. This order approved energy efficiency programs for EnergyNorth and Northern Utilities.

In Order No. 24,599, issued on March 17, 2006, the NHPUC approved an agreement for PUC Staff to take direct responsibility for the monitoring and evaluation of the Core energy efficiency programs on a collaborative basis with utilities and other interested

parties. As a result, NHPUC Staff has had primary responsibility for overseeing M&E of the Core programs since that time.

As part of the evaluation of Core electric and natural gas energy efficiency programs, over the course of 2008, the NHPUC and Utilities engaged a consultant, GDS Associates Inc., to undertake a major energy efficiency potential study. Among other things, that study analyzed current saturation rates of energy using equipment and penetrations of energy efficiency equipment and practices in each end-use category, evaluated the extent to which past and current energy efficiency programs have achieved energy savings to date, including various sensitivity analyses, and recommended modifications to program and measure offerings that could increase the likelihood of achieving the identified potential. This report can be found at:

www.puc.nh.gov/Electric/GDS%20Report/GDS%20Final%20Report.htm.

On December 31, 2010, the NHPUC issued Order No. 25,189 approving the Core electric and natural gas energy efficiency programs for 2011 and 2012. In that order, the Commission found, in part, that it would be appropriate for Staff to provide, on a prospective basis, quarterly reports on monitoring and evaluation activities. On February 1, 2013, the NHPUC issued Order No. 25,462 requiring the continuation of quarterly reports on monitoring and evaluation activities. These reports can be found at:

<http://www.puc.nh.gov/Electric/coreenergyefficiencyprograms.htm>

Traditional process, impact evaluation, and market assessment activities represent approximately five percent of the overall Core program budget.

The NHPUC and the Utilities are partners in the Northeast Energy Efficiency Partnership's (NEEP) Regional EM&V Forum and as such, they participate in several regional EM&V activities. These efforts target larger initiatives such as protocol development projects ([Glossary of Terms and Definitions, development methods and guidelines](#)) as well as research and evaluation projects (load shape studies, measure life and persistence) that can be done cost effectively on a regional basis.

The natural gas utilities explore opportunities to decrease the cost of planned evaluation efforts by performing research in collaboration with industry partners such as NEEP and GasNetworks™.

In 2016, the Commission established an Energy Efficiency Resource Standard (EERS) for New Hampshire Utilities. The Commission has long required the utilities to help their customers save money by using less electricity and gas. The State's 10-year energy strategy, developed under RSA 4-E:1 and crafted with the input of consumer groups, environmental advocacy organizations, utilities, and others, also calls for increased energy efficiency through all sectors of the economy. The Core energy efficiency programs have given the utilities 14 years of experience with developing and implementing cost-effective programs, and the EERS will build on that foundation.

As part of establishing EERS, the Commission approved a Settlement Agreement incorporating EM&V activities. Rigorous and transparent EM&V is essential to a successful EERS, to ensure that the energy efficiency programs actually achieve planned savings in a cost-effective manner. The Settlement Agreement envisions that the consultant(s) will share information and provide advice to other stakeholders, including the EESE Board, and this collaboration will enhance the development of EM&V framework for EERS programs going forward. Further, the development of a Technical Resource Manual, as proposed by the Settlement Agreement, will enhance EM&V transparency, consistency and accuracy.

Budgets for EM&V activities are approved by the Commission in the context of annual EERS filings, approved each December.

Following the submission by utilities of their 2018-2020 Energy Efficiency Plan ([Three Year Plan](#)) on September 1, 2017, and the review of that plan by Staff and the Parties, a Settlement Agreement was filed by the parties which called for the approval of the Three Year Plan with some modifications. The agreement incorporated the Three Year Plan's EM&V recommendations, which included establishment of an EM&V Working Group to manage and oversee evaluations, and the development of a Strategic Evaluation Plan based on a Six Year Evaluation Plan prepared for the Commission in 2014.² The Commission held a hearing on the Settlement Agreement on December 13, 2017, and the Commission approved the Settlement Agreement by Order [26,095](#) issued on January 2, 2018.

II. SCOPE OF SERVICES AND DELIVERABLES

The Settlement Agreement provides that the consultant(s) will be hired and supervised by the Commission to assist NHPUC Staff, the Utilities, and the Settling Parties, the EESE Board or successor, and others determined by the Commission who will be participating in EM&V activities.

The general scope and purpose of services to be provided by the consultant(s) are as follows:

1. The consultant will work closely with the EM&V Working Group in developing and confirming a clear and coherent set of recommended EM&V studies for the 2018-2020 period;
2. The consultant will seek to provide recommendations that would provide greater transparency in the overall planning and conduct of the EM&V studies;

² New Hampshire 2018-2020 Statewide Energy Efficiency Plan. Page 157-172. (September 2017) Available at: http://puc.nh.gov/Regulatory/Docketbk/2017/17-136/INITIAL%20FILING%20-%20PETITION/17-136_2017-09-01_NHUTILITIES_EE_PLAN.PDF

3. The consultant will seek to provide recommendations about EM&V issues that may become more relevant with changes in energy efficiency program budgets, program design, strategic direction, or policy guidance; and
4. The consultant will work with the EM&V Working Group in compiling a Technical Resource Manual for completion by 2020.

Specific tasks for the consultant will include the following:

- (a) Building a consensus around a series of EM&V Working Group priorities;
- (b) Providing guidance in finalizing the Strategic Evaluation Plan, including the definition of a systematic evaluation planning and implementation process, and the associated budget allocations;
- (c) Providing guidance on the implementation of several standard approaches for determining energy and demand savings (as well as other non-energy impacts);
- (d) Determining when impact evaluations should be accompanied by process evaluations, market effects evaluations, and market characterization studies;
- (e) Recommending when New Hampshire should participate in evaluation studies initiated in other jurisdictions in the region;
- (f) Facilitating agreement on a clear and coherent set of recommended M&E studies for the 2018-2020 period accompanied by an agreed timetable;
- (g) Providing advice on all key terms/definitions related to energy efficiency evaluation, and how to effectively benchmark appropriate metrics;
- (h) Offering guidance on key evaluation issues and review approval of proposed EM&V methodologies;
- (i) Informing the EM&V Working Group concerning publicly available energy efficiency evaluation resources;
- (j) Overseeing the development of a statewide Technical Resource Manual to be completed by 2020;
- (k) Ensuring compliance with ISO-NE's forward capacity market evaluation requirements;
- (l) Providing guidance to NHPUC Staff in the development of the regional Avoided Energy Supply Cost Study;
- (m) Providing guidance to ensure adequate utility program database consistency and utility program database documentation;
- (n) Keeping abreast of emerging issues associated with EM&V activities, including EM&V 2.0 developments;
- (o) Enhancing NHPUC Staff EM&V capabilities;
- (p) Enhancing EESE Board understanding of EM&V processes and their value
- (q) Identifying and tracking of key energy efficiency driven market indicators;
- (r) Supporting the investigation and development of a consensus on issues of net savings, non-energy impacts, and Demand Reduction Price Effects (DRIFE) and the determination of demand (kW) savings; and
- (s) Where possible, providing recommendations on the selection and hiring and /or review of work products of independent third-party evaluators/vendors.

The consultant will submit an annual report on the progress of EM&V activities, and the work of the consultant will be subject to an annual evaluation of progress achieved against the above-mentioned scope and tasks to take place during the month of October of each program year.

III. CONFIDENTIALITY

Each Proposer agrees to maintain confidential all information to which it has access until such time as it is instructed otherwise by the Commission. A Proposal must remain confidential until the effective date of any contract resulting from this RFP. A Proposer's disclosure or distribution of Proposals other than as permitted by the Commission will be grounds for disqualification.

IV. COMPONENTS OF THE PROPOSAL

The following is a list of the information to be provided in the Proposal. Proposers should respond to all areas listed below, in the order listed, and conclude with a separate section on cost.

1. Letter of Transmittal: Include name of Proposer, contact information for, and signature of, proposed consultant. (1 page)
2. Corporate/Company Information: Information concerning its corporate/company history; i.e., how many years in business, corporate officers or company principals, location of branch offices, professional and business association memberships, current or prior engagements involving substantive areas similar to those described in this RFP, the parties it represented in such engagements, the scope of work it performed in such engagements, and the conclusion and recommendations it made publicly in connection with such engagements. (1 page)
3. Proposed Scope of Work and Schedule: Describe the essential elements of the proposed services, including a description of the EM&V goals and milestones to be achieved during a three-year program. (no more than 3 pages)
4. Relevant Qualifications and Experience of Personnel Assigned: Detailed description of the Proposer's relevant experience with respect to the proposed scope of services, including a list of all personnel who will be assigned to this engagement, including the project manager (if applicable), and detailed resumes (in an appendix) and summaries of each individual reflecting their relevant experience and the nature of their specific responsibilities. During the course of the work, the Commission must approve in writing any substitutions or changes in personnel assigned to perform the work. (no more than 3 pages, not including the resumes of the key personnel)

5. References: A list of up to three references for work performed which is similar in scope or content to that proposed, preferably within the past 3 years. (1 page)
6. Statement of Disclosure: Identification and description of any existing or potential conflicts of interest, including those that arise as a result of relationships or affiliations with utility companies under the jurisdiction of the Commission, other industry participants, trade associations, or advocacy organizations or groups that participate in or represent active stakeholders in the commercial and industrial solar equipment manufacturing, sales, or installation industries.
7. Detailed Program Budget: Provide detailed annual program budgets for a three-year period, including details on key personnel including position, rates, and hours. (up to 3 pages)

V. SELECTION CRITERIA

Cost is a consideration but may not be the determining factor in the selection. In addition to cost, the Commission will also consider the following criteria, and assign a corresponding point score, where a maximum score for all criteria would be 100 points and any proposal with a total aggregate point score of less than 65 points will not be considered for selection.

1. Qualifications, technical expertise, certifications, knowledge and practical experience that the organization or individual possesses, including that of the staff and any subcontractors assigned to the engagement, providing services directly relevant to the specified scope of services. (Maximum Point Score: 25)
2. General experience and qualifications in providing similar services in New Hampshire as well as other states and to other utility commissions or regulatory agencies, including similar current or prior engagements. (Maximum Point Score: 25)
3. Cost of consulting services and expenses, including the competitiveness of the proposed fees and/or hourly rates and any proposed discounts or other benefits. (The Commission reserves the right to negotiate lower fees or a different hourly rate structure than proposed, with any selected firm(s) or individuals.) (Maximum Point Score: 20; first place shall receive 20 points, second shall receive 17, third shall receive 14, fourth shall receive 11, etcetera)
4. Ability to work effectively in New Hampshire, including accessibility and proximity to, and familiarity with New Hampshire. (Maximum Point Score: 20)

5. Overall responsiveness to the requirements of the RFP, including completeness, clarity, and quality of Proposal, including proposed allocation of resources and time to critical tasks, proposed scope of work and schedule. (Maximum Point Score: 10)

VI. TERM OF CONTRACT

The term of the contract shall be for three years, with an initial term for the period from its effective date up to and including December 31, 2018. The Commission shall have two options to renew for one consecutive twelve-month period each (Jan. – Dec. 2019 and Jan. – Dec. 2020) at the Commission's sole discretion.

VII. GENERAL PROPOSAL CONDITIONS

1. Proposals must be typed and double-sided. Proposals that are incomplete or unsigned will not be considered. Electronic Proposals must be received by the Commission no later than 4:30 p.m. EST on March 2, 2018. The electronic copy must be in PDF (portable document file) format. In addition to the electronic submission, prospective bidders must submit five (5) additional paper copies which must be postmarked no later than March 2, 2018. Proposals must be addressed to Eunice Landry, Business Administrator, New Hampshire Public Utilities Commission, 21 S. Fruit Street, Suite 10 Concord, NH 03301-2429, and to RFP@puc.nh.gov.
2. Proposers may submit written inquiries about this RFP by e-mail to RFP@puc.nh.gov no later than 4:30 p.m. EST on February 23, 2018. Inquiries and responses will be posted on the NHPUC's website at www.puc.nh.gov/home/requestforproposal.htm. Please note that answers to questions are carefully considered and may require several days before they are posted. It is strongly recommended that Proposers review the RFP in its entirety as soon as possible to allow the PUC time to answer questions and to allow the Proposer time to complete the Proposal.
3. The Commission reserves the right to cancel or withdraw this RFP, to reject or accept any or all Proposals, to reject or accept all or any part of any Proposal, to determine what constitutes a conforming Proposal, to waive irregularities that it considers not material to the Proposal, to award the Proposal solely as it deems to be in the best interest of the State, to contract for any portion of the Proposals submitted and to contract with more than one Proposer if deemed necessary. Notwithstanding any other provision of this RFP, this RFP does not commit the Commission to award a contract.
4. This RFP and all information relating to this RFP (including, but not limited to, fees, contracts, agreements and prices), are subject to the laws of the State of New Hampshire regarding public information and state procurement of goods

and services.

5. The Commission reserves the right to amend or modify this RFP at its discretion, prior to the Proposal submission deadline. In the event of an amendment or modification of this RFP, the State, at its sole discretion, may extend the Proposal submission deadline, as it deems appropriate.
6. Proposals must be valid for sixty (60) days following the deadline for submission of Proposals.
7. By submitting a Proposal, a Proposer agrees that in no event shall the Commission be either responsible for or held liable for any costs incurred by the Proposer in the preparation of or in connection with the Proposal, or for work performed prior to the effective date of any resulting contract.

VIII. CERTIFICATES

Proposers will be required to provide the following certificates prior to entering into a contract:

Secretary of State's Office Certificate of Good Standing ("CGS")	Individuals contracting in their own name do not need a CGS. Business organizations and trade names need a CGS, except for nonresident nonprofit corporations.
Certificate of Vote /Authority ("CVA")	Individuals contracting in their own name do not need a CVA. Business entities and trade names need a CVA.
Certificate of Insurance	Certificate of Insurance form attached with insurance coverage required under the contract. Modifications of insurance coverage required will be specified in the contract.
Workers' Compensation	Contractor must demonstrate compliance with or exception from RSA 281-A (and if applicable, RSA 228:4-b and RSA 21-I:80, and any other applicable laws or rules).

IX. FORM OF CONTRACT

1. The terms and conditions set forth in Form P-37 (v. 5/8/15) General Provisions Agreement (available at: <http://www.puc.nh.gov/Home/requestforproposal.htm>) are part of the proposal and will apply to any contract awarded to the Proposer.
2. Any contract resulting from this RFP shall not be deemed effective until the initial term and the ability to renew are approved by Governor and Council,

and subsequent options to renew are exercised in writing by the Commission.

3. Any contract awarded through this RFP or renewal period will expire on December 31, of each consecutive year. The Commission at any time, in its sole discretion, may terminate the contract including renewals, or postpone or delay all or any part of the contract including renewals, upon written notice to the engaged consultant.
4. When responding to this RFP, please include your ability to comply with Paragraph 14 of the Form P-37 General Provisions Agreement, "Insurance", referenced in subparagraph X.1 above. Please note that the Commission will allow substitution of professional liability insurance for part or all of the per occurrence comprehensive general liability insurance coverage. In addition, excess liability insurance in an equal amount may be substituted for up to \$1,000,000 of the per occurrence comprehensive general liability or professional liability insurance coverage. The State reserves the right to further waive or modify the insurance requirement in Paragraph 14 based on Proposals submitted.

X. FINANCIAL INFORMATION AND PUBLIC POSTING REGARDING RFPS

1. Pursuant to the relevant statutes and regulations, all responses to this RFP shall be considered confidential until the award of a contract. At the time of receipt of Proposals, the State will post the number of responses received with no further information. No later than five (5) business days prior to the final approval of the proposed contract, the Commission will post the name and the rank or score of each Proposer on the PUC website (<http://www.puc.nh.gov/Home/requestforproposal.htm>).
2. The content of each Proposal will become public information upon the effective date of any resulting contract. Any information submitted as part of a response to this RFP may be subject to public disclosure under RSA 91-A. In addition, in accordance with RSA 9-F:1, any contract entered into as a result of this RFP will be made accessible to the public online via the website Transparent NH (<http://www.nh.gov/transparentnh/>). Accordingly, business financial information and proprietary information such as trade secrets, business and financial models and forecasts, and proprietary formulas, may be exempt from public disclosure under RSA 91-A:5, IV. If you believe any information being submitted in response to a request for proposal, bid, or information should be kept confidential as financial or proprietary information, you must specifically identify that information in a letter to the Commission, and should mark/stamp the materials as such. Marking of the entire Proposal or entire sections of the Proposal (e.g., pricing) as confidential will neither be accepted nor honored.
3. Notwithstanding any provision of this RFP to the contrary, contractor pricing

will be subject to disclosure upon approval of the contract by the Commission. The State will endeavor to maintain the confidentiality of portions of the Proposal that are clearly and properly marked confidential. If a request is made to the State to view portions of a Proposal that the contractor has properly and clearly marked as confidential, the State will notify the contractor of the request and of the date upon which the State plans to release the records. A designation by the contractor of information it believes exempt from disclosure does not have the effect of making such information exempt. The State will determine the information it believes is properly exempted from disclosure. By submitting a Proposal, contractors agree that, unless the contractor obtains a court order, at its sole expense, enjoining the release of the requested information, the State may release the requested information on the date specified in the State's notice without any liability to the contractor.