**MEMORANDUM**

**DATE**: 10/4/19

**TO**: Evaluation Committee

**FROM**: Skumatz, Prahl, Wirtshafter, Jacobson, Chiodo

**SUBJECT**: Scoring / Qualifying Firms for Evaluation Subject Area Pools, 2019-2021

The Evaluation proposals were scored for research area pools. These pools become a high priority as we move into the development of RFPs for 2020/2021 projects. The qualified “pool” firms – plus the winners of 2019 projects within the research area -- form our eligible bidders list for each of three research areas:

* Residential evaluation pool – for a variety of evaluation projects in the residential sector.
* Commercial evaluation pool – for a variety of evaluation projects in the residential sector
* Survey capabilities pool – supplementing the access of qualified residential, commercial, and crosscutting firms to survey firms to provide competition and opportunities to control costs.

There is no separate pool for the cross-cutting projects. Winners of previous crosscutting projects and those firms qualifying in both residential and commercial areas are eligible for these projects.

**Process**:

Using a scale of 1-10 (10 being the best), at least three EA Team members scored each proposal on three criteria:

1. Qualifications of the firms on the Team, Team Management Plan / Roles, and Quality / Depth of Previous Project Experience, including references (45%)
2. Qualifications of Team Staff included and Team Lead Manager (30%)
3. Reasonableness of Rates relative to Qualifications (25%)

A minimum threshold of an average score of 6 was established, to allow Connecticut to maintain quality candidates, but weed out firms that would be unlikely to be successful bidders on Connecticut evaluation projects, either because of qualifications, experience, or rates, or a combination. Each scorer reviewed the proposal and rates, and provided scores for each firm on each of the three criteria. The weighted average score from each scorer was carried over to a summary page for that “pool”, and the average of the scores provided the overall scored assessment of each firm proposing in that “pool”.

We present the firms that have been scored as qualified candidates in each area.

* In the residential pool, the average weighted scores ranged from 4.3 (a firm that did not submit all the necessary elements) to 7.8. 12 firms qualify for residential RFPs, and 5 failed to qualify.
* In the commercial pool, the average weighted scores ranged from 4.5 to 7.7. 8 firms qualify for commercial RFPs, and 7 failed to qualify.
* In the survey pool, both firms were strong performers, and were deemed “qualified” (scores in the 7+ range).

We present the qualified firms in the Table below. We do not name those that were disqualified. All back-up scoring information will be provided to the utilities, as per our practice. The list includes those firms that won projects in 2019 and were automatically qualified in the relevant research pool.

**Figure 1: Recommendations for Firms Qualified in the Three Research Areas**

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| --- | --- | --- |
| Residential Pool | Commercial Pool | Survey Pool |
| 1. Dunsky Energy Consulting 2. EMI Consulting (with PWP, Inc.) 3. ERS (with Iec, Westhill, Ridgeline, and EcoMetric) 4. Evergreen Economics (with Michaels Energy) 5. Grounded Research & Consulting (with Convergence Data Analytics) 6. Illume Advising LLC 7. Michaels Energy (with Evergreen Econ) 8. Navigant Consulting Inc. 9. NMR (with DNV, Brightline, Cadeo, Demand Mgmt Institute, Demand Side Analytics) 10. Opinion Dynamics 11. SCS Analytics 12. TRC Engineers (with Karpman, Klos) | 1. ERS (with Iec, Westhill, Ridgeline, and EcoMetric) 2. Grounded Research & Consulting (with Convergence Data Analytics) 3. Illume Advising LLC 4. Michaels Energy (with Evergreen Econ) 5. Navigant Consulting Inc. 6. NMR (with DNV, Brightline, Cadeo, Demand Mgmt Institute, Demand Side Analytics) 7. Opinion Dynamics 8. TRC Engineers (with Karpman, Klos) | 1. Blackstone Group/ Data Prompt International 2. Corona Insights |

**REQUESTED ACTION: We request the Evaluation Committee to endorse these pools of eligible bidders to be used in our RFP processes for 2020/2021.**