**MEMORANDUM**

**DATE**: 6/7/21

**TO**: Evaluation Committee

**FROM**: EA Team by Skumatz

**SUBJECT**: Scoring / Recommending Firm for 2021 Evaluation Project #R2015, Low Load and All-

Electric Residential New Construction

This memo summarizes the background, process, and recommendations from the 2021 Evaluation Project RFP for project R2015, and requests a vote to move forward with contracting with the winning team for the project.

**Abstract / Summary of Action Requested:**

*This project had no responses in the previous RFP, but the project is important. Per the March 23 memo on the earlier 2021 RFP (and its approval), the Evaluation Committee agreed with the recommendation to re-issue this RFP[[1]](#footnote-1). The changes to the RFP included:*

* *Moved out deadline for final project results to December,*
* *Focused the response requirements, and*
* *Increased the budget to incorporate the contingency of 15% into the primary budget ($75K).*

*We received 5 proposals. Three EA team members scored the RFP. The same firm received the highest score from each scorer – Evergreen (with Michaels). The other bidders were: Dunsky, Illume, ODC, and TRC. The scores, in ranked order, were:* 5.5, 5.5, 6.0, 6.3, 7.5*. The winner, Evergreen, was selected because: They presented strong, relevant experience; their approach was iterative, building on and following up on information identified in the previous step; they focused on providing quantitative results; they include a mid-term stakeholder session; they provide two dedicated senior staff members, one of whom was the strongest person in any of the proposals, and their rates were the best given the level of experience compared to any of the proposals.*

*Upon approval of this memo’s recommendations by the Evaluation Committee, the EA team will:*

* *Notify the winner of their selection and*
* *Provide the selection documentation to the utilities to begin the contracting process.*

**RFP Process Schedule:**

After the update to the 2019-2021 Evaluation Plan was discussed, completed, and voted / approved on January 28, 2021, the EA Team developed scopes for the three projects that were to begin in 2021. Two projects were awarded from an RFP issued 2/19/21 and awards were approved 3/24/21. One project was not awarded. The following represents the schedule for the RFP review, release, and scoring.

* 4/19/21 - RFP draft provided to Evaluation Committee for review / edits.
* 4/23/21 – Committee comments received and comments were integrated into the RFP.
* 4/23/21 - RFP released / Issued via email to all pool-qualified firms (qualified in the Committee-approved pools for residential and cross-cutting pools, passed October 2019 meeting)[[2]](#footnote-2). Respondents were asked to note any deviations needed from the utility terms and conditions and other contracting items.
* 5/11/21 - Deadline for submittal of proposals was 5pm eastern.
* 5/18/21 - Scoring completed by EA Team
* 6/7/21 - Memo on scoring and recommendations provided to Evaluation Committee
* Vote by Committee requested – 6/8/21 – with documentation to be provided to utilities for contracting immediately after.

**Competitive RFP**:

The RFP was issued to all firms that were pre-qualified for the relevant pools for the 3-year term of this Plan. That initial 3-year RFP was distributed nationwide using both a laundry list of firms plus posting on two national websites for evaluation RFPs (IEPEC and AESP). The process “qualified” all winners of residential and commercial projects for 2019, plus the firms that met threshold scores after being scored by at least three EA Team members. The EA Team’s recommendations for eligible pools were approved by the Evaluation Committee in October 2019 meeting. There were twelve teams qualified in the residential research area, eight in the commercial area, eight cross-cutting, and two available outside of the teams for survey support.[[3]](#footnote-3) Each “team” consisted of from one to six firms. This latest RFP was sent to all pre-qualified teams in the residential and cross-cutting pools.

**Strong Response to this RFP**:

We received four responses: Dunsky, Evergreen, Illume, ODC, and TRC. All except Dunsky is currently under contractor for an on-going CT Evaluation project.

**Addressing Possible Conflicts:**

The EA Team works with consultants all across the country, and has known these firms or their staff for many years. In some other states, members of the EA Team oversee projects by these firms. Each EA Team member understood the need to base our evaluations solely on the proposals and their evaluation criteria, performance, and best benefit for CT. No conflicts existed.

**Scoring**:

Three EA Team members were selected to score the proposals. Each EA Team member received all the proposals. Each received an identical scoresheet for use, and used a scale of 1-10 (10 being the best), scoring each proposal on three criteria:

1. Technical approach / understanding of the assignment (40%)
2. Qualifications / Experience of Team (30%)
3. Cost / budget / Value / Reasonableness of Rates relative to Qualifications (30%)

After team members scored the responses, a conference call was held to discuss any questions on the criteria or submittals. The initial discussion found all EA members had scored the same firm as highest. The final scores were submitted and tallied and the results are presented in this memo.

**Results and Recommendations**:

The scores for the 5 proposals were:

* 5.5, 5.5, 6.0, 6.3, 7.5.

The element of the rationale for the award to Evergreen, with a score of 7.5, included:

* Present the right / relevant kind of experience. Well-thought out approach, including re-visiting topic research after initial research and interviews and follow-up leads. Show an approach that seeks numeric results. Strong staff assigned. Will be a successful project.
* They have lower rates and have dedicated two senior staff members, one of whom is superior to anyone else in any proposal.
* The mid-term stakeholder session is a valuable addition. Good presence of senior staff, and best rates for a given level of experience of any of the proposals.

Note that the recommended firm (team) is already under direct contract, with current projects. In addition, we are confident the firm (team) can add this project work without compromising quality or deadlines, as the proposed team is largely constructed of staff not working on other Connecticut projects.

**Conclusions:**

The process was successful at obtaining responses from strong firms, and identified a strong, winning firm for the assignment. Notes about the process and submittals follow:

* We had strong competition – 5 submittals
* The project is consistent with the approved Evaluation Plan. The proposal process provides a jump start on project planning / development.
* The selected team was highly qualified for the work, and we are confident the team can manage the workload.
* The firm has an existing project – and contract – for work in CT, which is fortunate in three ways: 1) the project should be able to be accommodated by the EA Team without significant increases in calls or administrative work; and 2) the firm is familiar with CT procedures; and 3) the firm already has most contract documents completed, which we hope will expedite the contracting process.

**REQUESTED COMMITTEE ACTION AND NEXT STEPS:**

*We request the Evaluation Committee to approve the selection of the Evergreen team for project R2015, and endorse starting the contracting process.*

* *EA Team will support this selection for contracting purposes by notifying respondents of successful or unsuccessful status, and providing the following to the utilities within one week: this memo (with timeline and process summary), the RFP, the responding proposals, along with a scope and budget for R2015.*

1. We were unable to negotiate a scope with NMR, which was the first option for this project. [↑](#footnote-ref-1)
2. This includes 8 teams qualified for cross-cutting and commercial, and 4 qualified for residential. The survey pool was not relevant for this project. [↑](#footnote-ref-2)
3. For reference, 5 teams did not qualify for the residential pool, 7 failed to qualify for commercial, and all qualified for the survey pool. [↑](#footnote-ref-3)