



Solicitation Information  
July 1, 2015

**RFP # 7549710**

**TITLE: Evaluation Study for the System Reliability Procurement Solar DG Pilot**

**Submission Deadline: Wednesday, July 29, 2015 @ 2:00 PM (Eastern Time)**

**Pre-Bid conference: No**

Questions concerning this solicitation may be addressed to [gail.walsh@purchasing.ri.gov](mailto:gail.walsh@purchasing.ri.gov) no later than **Monday, July 13, 2015 at 5:00 PM (ET)**. Questions should be submitted in a *Microsoft Word attachment*. Please reference **RFP #7549710** on all correspondence. Questions received, if any, will be answered and posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

**SURETY REQUIRED: No**

**BOND REQUIRED: No**

Vendors must register on-line at the State Purchasing Website at [www.purchasing.ri.gov](http://www.purchasing.ri.gov).

**NOTE TO VENDORS:**

**Offers received without the entire completed three-page RIVIP Generated Bidder Certification Form attached may result in disqualification.**

**THIS PAGE IS NOT A BIDDER CERTIFICATION FORM**

## SECTION 1 - INTRODUCTION

The Rhode Island Department of Administration, Division of Purchases, on behalf of the Office of Energy Resources (OER) is seeking qualified vendors, with significant expertise in evaluation, measurement, and verification (EM&V), to submit proposals for completing the scope of work under the “Evaluation Study for the Rhode Island Office of Energy Resources System Reliability Procurement Solar DG Pilot” project in accordance with the terms of this solicitation and the State of Rhode Island’s General Conditions of Purchase, which may be obtained at the Rhode Island Division of Purchases website at [www.purchasing.ri.gov](http://www.purchasing.ri.gov).

To access the State’s General Conditions of Purchase, enter our website, click on RIVIP, then click on General Information and then click on Rules and Regulations. Once the Rules and Regulations are displayed, scroll to the bottom of the page and double click on Appendix A, which contains the State’s General Conditions of Purchase.

This is a Request for Proposals, not an Invitation for Bid. Responses will be evaluated on the basis of the relative merits of the proposal, in addition to price; there will be no public opening and reading of responses received by the Division of Purchases pursuant to this Request, other than to name those offerors who have submitted proposals.

The purpose of this project is to evaluate the outcomes of the OER’s ongoing solar pilot within the towns of Tiverton and Little Compton, RI. The goal of the project is to demonstrate the capability, costs, and value for solar distributed generation to provide sustained, reliable load relief in concert with a portfolio of other customer-side resources deployed through separate National Grid initiatives (energy efficiency, demand response).

Funding for these grants is available through the “2012 Plan for the Allocation and Distribution of Regional Greenhouse Gas Initiative Auction Proceeds.” The 2012 Allocation Plan provides \$840,842.37 Dollars for a pilot project to evaluate the costs and benefits of deploying renewable distributed generation in conjunction with the utility System Reliability Plan (SRP). A portion of the \$840,842.37 funding is reserved for this solicitation. It is anticipated that the total amount of funding awarded under this solicitation will be between \$100,000.00 and 150,000.00.

Funding for this activity is being provided under the Regional Greenhouse Gas Initiative Act. Terms and Conditions of this funding are pursuant to the “Rules and Regulations for the Allocation and Distribution of Regional Greenhouse Gas Initiative Auction Proceeds,” available at [www.energy.ri.gov/rggi/](http://www.energy.ri.gov/rggi/).

## SECTION 2 – INSTRUCTIONS AND NOTIFICATIONS TO BIDDERS

Potential Respondents are advised to review all sections of this solicitation carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.

Proposals which depart from or materially alter the terms, requirements, or scope of work defined by this solicitation will be rejected as being non-responsive.

All costs associated with developing or submitting a proposal in response to this solicitation, or to provide oral or written clarification of its content shall be borne by the Respondent. The State assumes no responsibility for these costs.

Proposals are considered to be irrevocable for a period of not less than sixty (60) days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.

Proposals misdirected to other State locations or which are otherwise not present in the Division of Purchases at the time of opening for any cause will be determined to be late and will not be considered. For the purposes of this requirement, the official time clock is in the reception area of the Division of Purchases.

All pricing submitted will be considered to be firm and fixed unless otherwise indicated herein.

It is intended that an award pursuant to this Request for Proposals will be made to a prime contractor(s) who will assume responsibility for all aspects of the work. Joint ventures shall be considered, so long as the contractor's duties and responsibilities are clearly articulated in such form as acceptable to the State. Subcontractors are permitted, provided their use is clearly indicated in the offeror's proposal and the subcontractor(s) to be used are identified in the proposal.

All proposals should include the vendor's FEIN or Social Security number as evidenced by a W9, downloadable from the Division's website at [www.purchasing.ri.gov](http://www.purchasing.ri.gov).

The purchase of services under an award made pursuant to this RFP will be contingent on the availability of funds.

In accordance with Title 7, Chapter 1.2 of the General Laws of Rhode Island, no foreign corporation, a corporation without a Rhode Island business address, shall have the right to transact business in the state until it shall have procured a Certificate of Authority to do so from the Rhode Island Secretary of State (401-222-3040). *This is a requirement only of the selected bidder.*

Respondents are advised that all materials submitted to the State of Rhode Island for consideration in response to this RFP will be considered to be public records, as defined in Title 38 Chapter 2 of the Rhode Island General Laws, without exception, and will be released for inspection immediately upon request, once an award has been made.

Interested parties are instructed to peruse the Division of Purchases website on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP.

The Respondent should be aware of the State's Minority Business Enterprise (MBE) requirements, which address the State's goal of ten percent (10%) participation by MBE's in all State procurements. For further information, contact the MBE Administrator, at (401) 574-8253 or visit the website at [www.mbe.ri.gov](http://www.mbe.ri.gov). Upon tentative selection, all applicants are required to submit an MBE plan to the MBE office and shall demonstrate good faith efforts to achieve MBE participation.

Equal Employment Opportunity (RIGL 28-5.1) § 28-5.1-1 Declaration of policy. – (a) Equal opportunity and affirmative action toward its achievement is the policy of all units of Rhode Island state government, including all public and quasi-public agencies, commissions, boards and authorities, and in the classified, unclassified and non-classified services of the state employment. This policy applies in all areas where the state dollar is spent, in employment, public service, grants and financial assistance, and in state licensing and regulation. For further information, contact the Rhode Island Equal Employment Opportunity Office, at 222-3090 or via email [Raymond.lambert@doa.ri.gov](mailto:Raymond.lambert@doa.ri.gov).

### **Architectural/Engineering Services**

Persons or firms practicing Architectural and/or Engineering Services in the State of Rhode Island must possess a proper registration and Certificate of Authorization in accordance with Rhode Island General Laws.

A copy of the current Rhode Island Certificate of Authorization for the firm and current Rhode Island registration(s) for the individual(s) who would perform the work must be included behind the front page of each copy of the Proposal.

A Respondent who does not have a current Rhode Island Certification of Authorization for the firm and current Rhode Island registration(s) must acknowledge non-compliance with this requirement and confirm in writing that, if selected for the project, will expedite acquisition of a Rhode Island registration(s) and Certificate of Authorization(s), the attainment of which will be required before an award will be made. The letter of acknowledgement must be included behind the front page of each copy of the Proposal.

The Board of Design Professionals can be contacted as follows:

Board for Design Professionals  
State Board of Registration for Professional Engineers  
1511 Pontiac Avenue, Building 68-2  
Cranston, RI 02920  
Tel: (401) 462-9592  
Fax: (401) 462-9532  
Website: [www.bdp.state.ri.us](http://www.bdp.state.ri.us)

The Respondent's Proposal may be disqualified and removed from consideration if the Proposal fails to include the required current Rhode Island Certificate of Authorization for the firm and current Rhode Island registration(s), or, in absence of these documents, to acknowledge need to acquire them prior to award if selected.

Questions, in **Microsoft Word Format**, concerning this solicitation, may be e-mailed to the Division of Purchases at [gail.walsh@purchasing.ri.gov](mailto:gail.walsh@purchasing.ri.gov) no later than the date and time indicated on page 1 of this solicitation. Please reference the RFP number on all correspondence.

Responses to questions received, if any, will be provided, as an Addendum to this RFP, and posted on the Rhode Island Division of Purchases website at [www.purchasing.ri.gov](http://www.purchasing.ri.gov). It is the responsibility of all interested Respondents to download this additional information. *If technical assistance is required to download, call the Help Desk at (401) 222-3766 or [lynda.moore@doit.ri.gov](mailto:lynda.moore@doit.ri.gov).*

## SECTION 3 – PROJECT DESCRIPTION

### **SUMMARY**

The Rhode Island Office of Energy Resources (OER) is seeking qualified vendors, with significant expertise in evaluation, measurement, and verification (EM&V), to submit proposals for completing the scope of work under the “Evaluation Study for the Rhode Island Office of Energy Resources System Reliability Procurement Solar DG Pilot” project. The purpose of this project is to evaluate the outcomes of the OER’s ongoing solar pilot within the towns of Tiverton and Little Compton, RI. The goal of the project is to demonstrate the capability, costs, and value for solar distributed generation to provide sustained, reliable load relief in concert with a portfolio of other customer-side resources deployed through separate National Grid initiatives (energy efficiency, demand response).

### **BACKGROUND**

#### *System Reliability & Least-Cost Procurement*

Rhode Island’s 2006 Comprehensive Energy Conservation, Efficiency, and Affordability Act established the state’s landmark “Least-Cost Procurement” policy, which requires electric and natural gas distribution companies to invest in “all cost-effective” energy efficiency before the acquisition of additional supply. The law contains an important and innovative provision requiring electric distribution companies (National Grid, “the Company”) to develop an annual “System Reliability Procurement” (SRP) Plan, which must strategically consider an array of customer and utility-sited energy resources to maximize their benefit to Rhode Island’s energy system. These “non-wires alternatives” (NWA) include but are not limited to cost-effective energy efficiency measures, distributed generation and demand response measures that are targeted toward reducing the peak loads on the electricity grid. The Company is asked to assess whether an array of such resources could be deployed to avoid more expensive “peaking” generators and defer distribution (and potentially transmission) system investments. Deferring distribution system investments could provide savings over time for customers and could lower the volatility and cost uncertainty of the larger energy and capacity markets in New England by securing sources of energy supply and capacity from in-state resources.

#### *The National Grid System Reliability Procurement Plan*

Since its first System Reliability Procurement Report (SRP Report) which was approved in Docket 4296 in 2012, National Grid has been conducting a pilot called “DemandLink” in Tiverton and Little Compton. This pilot is designed to defer the need for a new substation feeder in the Tiverton/Little Compton region through at least 2017 by targeting energy efficiency measures and conducting a demand response program in the area that will reduce the load on specific feeders attributable to customer air conditioning, lighting, and other summer-peaking loads. If the pilot is successful in enrolling and providing 1 megawatt (MW) of sustained load relief over its planned lifecycle, it will result in deferred construction of a new substation feeder estimated to cost \$2.9 million for four years. On November 1, 2014, National Grid filed its plans to continue the DemandLink pilot in 2015. More information on the National Grid System Reliability Procurement Plan may be found here:

[http://www.ripuc.org/eventsactions/docket/4453-Ngrid-SRP2014\\_11-1-13.pdf](http://www.ripuc.org/eventsactions/docket/4453-Ngrid-SRP2014_11-1-13.pdf).

### *The Renewable Energy Growth Program*

In 2014, the Rhode Island General Assembly enacted the Renewable Energy Growth (REG) Program. The REG Program is intended to support the development of 160 MW of locally-based distributed generation projects in Rhode Island between 2015 and 2019. The Program helps finance the development, construction, and operation of renewable energy projects through a performance-based incentive system that is designed to achieve specified megawatt targets. Eligible technologies are wind, solar, anaerobic digestion, and small hydropower. More information on the Renewable Energy Growth Program may be found here: <http://www.ngrid.com/REGrowth>.

### **OER SYSTEM RELIABILITY PROCUREMENT SOLAR DG PILOT PROJECT**

To date, the Company's pilot has relied solely on efficiency and demand response measures to achieve the required load relief and has not proposed including or assessing the potential of distributed renewable energy systems as part of the system reliability portfolio. Therefore, OER proposed to allocate thirty-five percent (35%) of auction proceeds from the 2011 Regional Greenhouse Gas Initiative (RGGI) auctions for the OER "System Reliability Procurement Solar DG Pilot Project", to assess via a pilot project the viability, costs, and benefits of solar distributed generation as a system reliability resource (non-wires alternative). More information on the 2012 Plan for the Allocation and Distribution of Regional Greenhouse Gas Initiative Auction Proceeds may be found here:

<http://www.energy.ri.gov/documents/rggi/2012%20RGGI%20Allocation%20Plan.pdf>.

To develop a framework for the SRP Solar DG Pilot, OER and National Grid commissioned a study by Peregrine Energy Group, Inc. entitled "Solar PV for Distribution Grid Support: The Rhode Island System Reliability Procurement Solar Distributed Generation Pilot Project". The goal of the study was to: 1) assess solar deployment options and develop a proposed configuration for a portfolio of DG resources to meet **250 kW of summer peak load reduction** in the SRP pilot footprint in Tiverton and Little Compton, and 2) recommend an implementation strategy to solicit participation in the pilot and procure the DG resources. More information on the Peregrine Energy Group, Inc. report and the report itself may be found here:

<http://www.energy.ri.gov/reliability/>. A copy of the Peregrine report is also attached as Attachment A.

Figure 1 displays Peregrine's final recommended portfolio of solar resources to achieve 250 kW of summer peak load reduction:

	1	2	3	4
	Grid Support Solar Field(s)	Solarize Residential	Other Small Projects	Total
1 Gross Capacity (kW)	280	160	80	520
2 Average Distribution Contribution Percentage (DCP)	50%	45%	45%	
3 Distribution Contribution (kW)	142	72	36	250
4 Portfolio Allocation	57%	29%	14%	100%

Figure 1. Peregrine Energy Group’s recommended SRP solar DG resource portfolio for Tiverton & Little Compton

OER is in the process of implementing the recommendations of the Peregrine report. As of June 2015, OER has taken the following steps to execute the recommendations of the report:

- Solarize Tiverton and Little Compton:** OER partnered with the Renewable Energy Fund (REF) at Commerce RI and non-profit SmartPower to launch a “Solarize” pilot in Tiverton and Little Compton. Solarize is a targeted marketing and education campaign aimed at increasing the adoption of small-scale solar for residences and small businesses. The selected solar installer for both Tiverton and Little Compton is Sol Power. The Solarize campaign launched in January 2015 and closed in June 2015. Results are the following: 28 contracts signed representing 183.66 kW of solar in Little Compton and 27 contracts representing 204.34 kW of solar in Tiverton. OER’s internal goal for solar enrollment through this initiative was a total of 240 kW nameplate capacity, as shown in Figure 1. All systems installed through the Solarize initiative will be behind-the-meter, net-metered systems utilizing small-scale solar rebates available through the REF<sup>1</sup>. An additional “SRP Incentive”—an incremental rebate for tilt/orientation configurations that increase solar contribution to distribution needs—is being offered to qualifying systems through this program. A detailed methodology for determining the SRP Incentive may be found in Attachment B.
- Grid Support Solar Field(s):** OER issued a solicitation entitled CR-38: “Solar PV for Distribution Grid Support, accessible at the following link: <http://www.purchasing.ri.gov/bidding/ContinuousRecruitment.aspx>. A copy of the solicitation is also attached as Attachment C. The solicitation is for project proposals for a total of 140 kW-AC “peak contribution” capacity<sup>2</sup> of medium-scale solar system(s) in the specific, load-constrained areas of Tiverton and Little Compton. Competitively-bid grant awards will be offered to developers to cover the incremental costs of solar systems that provide distribution grid benefits. It is anticipated that selected project(s) will pursue

<sup>1</sup> <http://www.commerceri.com/finance/REF.php>

<sup>2</sup> “Peak contribution” solar capacity is determined by the “Distribution Contribution Percentage” or “DCP” in the Peregrine report. It is the same as “Distribution Contribution” as shown in Figure 1. “Peak contribution” solar capacity refers to the actual kW-AC capacity a solar system delivers to the local distribution system during peak periods.

a Distributed Generation tariff under the 2015 Renewable Energy Growth (REG) Program, likely within the “Medium Solar” category<sup>3</sup> (26 to 250 kW). The solicitation closed April 20, 2015. A 250 kW single-axis tracking system was awarded an incremental grant through this solicitation. The developer plans to submit an REG application in 2015 for this project.

- **Other Projects:** OER may exercise the option to deploy additional funds to support additional westward facing residential or larger solar projects in Tiverton and Little Compton following the conclusion of the Solarize initiative and the Grid Support Solar Field initiative.

## **SCOPE OF WORK**

OER is seeking project proposals for evaluation, measurement, and verification (EM&V) services to evaluate the outcomes of the OER SRP Solar DG Pilot. The selected vendor will enter into a multi-year contract with OER to provide technical expertise, data analysis, and impact and process evaluation services regarding the ongoing performance monitoring of the solar DG resources deployed through the pilot: (1) small “Solarize” projects and (2) larger “Grid Support Solar Field” project(s) and (3) any additional solar projects that OER may provide with further funding or program support in Tiverton and Little Compton. A final report will analyze the extent to which the pilot met its objectives and will make recommendations drawing on lessons learned from the pilot outcomes.

OER will designate staff to work directly with the selected contractor throughout the course of the project. OER will assist as needed in facilitating and coordinating project communications. Specifically, OER will assist as needed in connecting the selected contractor with various stakeholders including, but not limited to, National Grid staff, Peregrine staff, REF staff, and contractors/consultants working on the Solarize and Grid Support efforts.

OER anticipates the need for the following tasks through this solicitation. If vendors identify a need for additional tasks or work activities, they may indicate such additions in their project proposals.

### **1. Goals**

- 1) Develop a list of goals for this evaluation, including a list of questions to be answered (building on information contained in this solicitation), and obtain client agreement on it.

### **2. Site Monitoring**

- 1) Recommend, and obtain client agreement on, the frequency of future solar data collection (e.g., every 15 seconds), along with a method for synchronization with the frequency of

---

<sup>3</sup> The “Medium Solar” category will receive a fixed-price performance incentive in the REG Program. This will provide developers with certainty regarding the \$/kWh price to be paid for electricity generated by their proposed project.

load data that has been and, if different, will be available from National Grid. For the Peregrine report, National Grid was able to supply hourly load data.

- a) All solar systems installed through the Solarize initiative are net-metered, and systems on Feeders 3 and 4 will be installed with a solar data acquisition system (DAS). Sol Power, the Solarize installer, selected Solar-Log 360 & GE Meter to use for the Solarize pilot. This meter collects both PV production and in-home energy usage. The specifications for this DAS can be found in Attachment D.
  - b) The Grid Support Solar Field(s) will have a revenue-grade interval meter installed by National Grid through the Renewable Energy Growth (REG) Program. It will also have a DAS (Locus Energy LGate 360) installed. The specifications for this DAS can be found in Attachment E.
- 2) Select or design a database for collection and analysis of solar output data (e.g. oSPARC or other) and other site data (e.g., azimuth orientation, tilt angle, shading, other characteristics) for purposes of:
    - a) This evaluation, and
    - b) Ongoing monitoring of solar generation by/for OER, and
    - c) If desired by National Grid, ongoing utilization of near-real-time solar data for distribution operation, or whatever data National Grid may request for distribution planning.
  - 3) Review the settings, communication protocol(s) and/or verification procedures put in place for the Solarize systems and the Grid Support Solar Field(s) to ensure that the DAS/meters transmit the correct data to the database.
  - 4) Implement the selected database and communication systems and initiate collection of future and historical data. Please state the number of business days after award of the contract at which the database is to be (a) selected or designed, and (b) implemented.

### **3. Impact Analysis**

- 1) Collect and prepare data:
  - a) Obtain relevant analyses of distribution system experience or performance for the study area, and all available evaluations or other analyses of National Grid SRP pilot impacts and other results that may be relevant for evaluation of solar impacts;
  - b) Obtain appropriate load data from National Grid with the greatest frequency and longest period of availability, including the load data and calculations utilized for the Peregrine report;
  - c) Obtain weather data for Newport and/or Providence for the longest period for which historical load or solar data is available;
  - d) Obtain insolation data for the study location;
  - e) Prepare the dataset of solar kW-ac output from the Solarize projects and Grid Support Solar Field project(s) as collected from the DASs and meters;
  - f) Match load, weather, insolation and solar system production data by time period;
  - g) Obtain from the REF project completion data for installed Solarize projects including system size, final project citing data including shading, and SRP Incentive (i.e.

- incremental rebate for tilt/orientation configurations that increase solar contribution to distribution needs) if any; and
- h) Obtain site specific data from solar developers of the Grid Support Solar Field project(s). Should these projects not be installed and interconnected by the time of program analysis, proposed project information may be used.
- 2) Analyze and report on impact metrics, separately for: (1) small Solarize installations (distinguishing between Solarize projects that received an SRP Incentive), and (2) larger Grid Support Solar Field(s):
    - a) Generation: annual and monthly kWh for peak and off-peak periods;
    - b) Capacity: utilizing FCM or other prevailing ISO-NE protocol for solar generation capacity, reporting on kW capacity and capacity revenue that (a) was obtained and, separately, (b) could have been obtained by site owner and/or distribution company and/or other market participant(s); and
    - c) Contribution to distribution:
      - i) Solar kW-ac output in the hour (and, subject to data availability, in shorter increments of time) of the summer peak for each year;
      - ii) The above solar kW as a percentage of the solar capacity installed (kW-ac), which is equivalent to the “DCP-N” metric in the Peregrine report;
      - iii) Other metrics that elaborate on the relationship of solar output and feeder load and/or that may provide information on the value of the solar systems to the distribution system and indications of other benefits or costs to distribution system; and
      - iv) Evidence of actual deferral of distribution investments or other costs to date.
  - 3) For years with sufficient solar generation data (i.e., may not be appropriate for 2015), correlate and analyze the effect on the above impact metrics of causal factors including the following:
    - a) Small Solarize installations versus larger Grid Support Solar Field(s);
    - b) Solarize projects that did or did not receive SRP Incentives;
    - c) azimuth orientation and tilt angle;
    - d) shading;
    - e) insolation levels;
    - f) weather patterns (e.g. cloud cover, wind speed/direction, humidity);
    - g) patterns of peak load over time;
    - h) location relative to greatest distribution need; and
    - i) other characteristics of the distribution load.
  - 4) Analyze the above impacts of the OER SRP Solar DG Pilot systems relative to the impacts of the National Grid SRP pilot as a whole, including reporting on or assessing:
    - a) the overall impact of the SRP pilots, combining the above solar impacts with the impacts of energy efficiency and load response;
    - b) the incremental impact of the SRP solar systems above the impacts of the rest of the SRP; and
    - c) any indications of synergies between the solar and other elements of the SRP, such as
      - i) marketing synergies,

- ii) potential reductions in the length of time during which customers were requested to reduce demand for the National Grid SRP pilot—due to solar generation during the peak period when demand response would otherwise have been needed.
- 5) Conduct other analyses proposed or requested by the contractor or other stakeholders.
  - 6) Prepare Interim Report (fall of 2015) on impacts of the subset of SRP solar installations to date or any indications of issues or lessons that can be learned to date. Include any needs for changes in metering, collection, processing of solar or distribution data.
  - 7) Prepare Final Report (late 2016) on impacts of all SRP solar systems installed by beginning of summer 2016.

#### **4. Process Evaluation: Solarize Campaign and Grid Support Solar Field(s)**

- 1) Conduct interviews with a small number of individuals, such as:
  - a) Solar contractor for Solarize initiative;
  - b) Solar developer(s) for Grid Support Solar Field(s);
  - c) Solar developers who decided not to bid on the Grid Support Solar Field(s);
  - d) National Grid;
  - e) OER;
  - f) Personnel involved in efficiency and demand response elements of the National Grid SRP pilot;
  - g) Small number of customers (not statistical sample);
  - h) Municipal official knowledgeable of solar activity;
  - i) SmartPower; and
  - j) Others.
- 2) Analyze Solarize penetration rate quantitatively and, as appropriate, qualitatively:
  - a) number and percent of customers installing solar, including assessment of the impact of SRP Incentive incremental rebates and marketing on orientation for distribution benefit, and
  - b) comparisons with program goals and with the most appropriate points of comparison elsewhere, such as:
    - i) Other locations in Rhode Island, and
    - ii) Early Solarize campaigns in other states (e.g., first round of Solarize in Massachusetts and Connecticut).
- 3) Analyze effectiveness and efficiency of solar elements of the Solarize campaign, and identify strategies that were more or less successful in areas such as:
  - a) marketing and sales;
  - b) solar ambassadors;
  - c) customer communications;
  - d) customer satisfaction;
  - e) activities of Sol Power;
  - f) synergies in messaging, outreach, intake, other program elements; and

- g) lessons for future related solar activities.
- 4) Analyze effectiveness and efficiency of Grid Support Solar Field(s) solicitation process, structure, and features. Identify strategies that were more or less successful including:
  - a) Structure of the solicitation to offer competitively-bid grant awards to developers to cover the incremental costs of solar systems that provide distribution grid benefits;
  - b) Response/reaction of market participants to solicitation; and
  - c) Suitability of the grant structure to solicit market interest in the opportunity.
- 5) Prepare Interim Report (fall of 2015).
- 6) Prepare Final Report (late 2016).

## **5. Recommendations**

- 1) Provide thoughtful analysis regarding the extent to which the pilot met its objectives and make recommendations drawing on lessons learned from the pilot, including, but not limited, to the items below. The recommendations section should be included in the Final Report:
  - a) Is there evidence of contribution to actual distribution deferral(s) over time?
  - b) How do the pilot results and data line up with the models for distribution contribution developed by Peregrine? How do the costs and benefits line up?
  - c) What does the comparison of the cost-effectiveness between the upgrade costs (deferred value) and the total cost of solar with total load relief look like? What does the comparison of the incremental cost and incremental load relief from the reorientation of the solar systems look like?
  - d) What factors (weather-related, distribution-related, or otherwise) are driving both load and solar production and the degree of their co-incidence? Are these patterns unique to the study area (i.e. how transferrable are the observations, methods, and tools)?
  - e) Can the results of this pilot potentially be used to design location-specific “zonal incentives” through Rhode Island’s new Renewable Energy Growth (REG) Program, and if so, how?
  - f) Are there additional research questions/what additional research may be required?

Table 1. Anticipated Project Timeline

<b>Milestone</b>	<b>Anticipated Date</b>	<b>Description</b>
RFP Release Date	July 1, 2015	OER anticipates the release of the “Evaluation Study for the System Reliability Procurement Solar DG Pilot” RFP.
Submission of Questions on RFP Due	July 13, 2015	Questions may be submitted to the contact listed on the first page of this solicitation. Questions should be submitted in a Microsoft Word attachment. Questions received, if any, will be answered and posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.
Notification of Intent to Bid Due	July 20, 2015	Interested vendors are encouraged to send a notification of intent to bid on this solicitation to <a href="mailto:gail.walsh@purchasing.ri.gov">gail.walsh@purchasing.ri.gov</a> at any point up until Monday, July 20, 2015. Notifications of intent to bid are preferred, but not required.
Proposals Due	July 29, 2015	Proposal deadline. Please see “Proposal Requirements” for proposal submission details.
Proposal Award Date	August 19, 2015	Anticipated proposal award date.
Interim Report	Fall 2015	Interim Report due.
Final Report	Late 2016	Final Report due.

## SECTION 4 – PROPOSAL REQUIREMENTS

### General Submission Requirements

Responses (an original plus four (4) copies) should be mailed or hand-delivered in a sealed envelope marked “**RFP # 7549710, Evaluation Study for the System Reliability Procurement Solar DG Pilot**” to:

RI Department of Administration  
Division of Purchases, 2<sup>nd</sup> floor  
One Capitol Hill  
Providence, RI 02908-5855

NOTE: Proposals received after the above-referenced due date and time (first page of this solicitation) will not be considered. Proposals misdirected to other State locations or which are otherwise not presented in the Division of Purchases by the scheduled due date and time will be determined to be late and may not be considered. Proposals faxed or emailed to the Division of Purchases will not be considered. The official time clock is located in the reception area of the Division of Purchases.

Proposals should include the following:

- A completed and signed three-page RIVIP Bidder Certification Cover Form, available at [www.purchasing.ri.gov](http://www.purchasing.ri.gov).
- A letter of transmittal signed by the owner, officer, or authorized agent of the firm or organization, acknowledging and accepting the terms and conditions of this Request.
- A Technical Proposal (see below) describing the qualifications and background of the applicant and experience with similar programs, as well as the work plan or approach proposed for this requirement.
- A **separate sealed** Cost Proposal (original plus four (4) copies) as described below.
- A completed and signed W-9 (taxpayer identification number and certification). Form is downloadable at [www.purchasing.ri.gov](http://www.purchasing.ri.gov). **Please include with original proposal only.**
- In addition to the multiple hard copies of proposals required, Respondents are requested to provide their proposal in electronic format (CD-ROM, diskette, or flash drive). Microsoft Word/Excel or PDF format is preferable. Only 1 electronic copy is requested and it should be placed in the proposal marked “original.”

Proposal submissions should address the vendor's approach to the tasks outlined in the scope of work. All proposals submitted for this request must be submitted in the format described below, clearly labeling the sections as described. Please keep fonts to 11 point at a minimum. Proposals should be kept to a maximum of twenty (20) pages (at 1.5 line spacing) including all sections listed below:

**1. Overview**

The Overview will concisely lay out the offeror's understanding of the scope of work, describe their proposed approach and explain how they are well suited to perform the tasks.

**2. Technical Proposal**

Discuss your solution to the tasks in the proposed scope of work. Include a description of your approach to the goals, site monitoring, impact analysis, process evaluation, and recommendations. Indicate your ability to complete the scope of work within the established timeframe and provide a proposed schedule of deliverables/project milestones.

**3. Qualifications & Experience**

Please provide the following:

- **Company Profile:** Provide an overview of history, length of time in business, organizational and staff capacity, core competencies, and any other resources uniquely suited to recommending and implementing solutions to the scope of work outlined in this solicitation.
- **Relevant Experience:** Describe your experience with similar projects.
- **Examples of Prior Work:** If possible, reference two or three examples of previous projects that best display your ability and experience with work of a similar nature and specify the role your firm played in each project.
- **Reference Information:** Provide names, addresses, telephone numbers and permission to contact two former or current clients for which your organization has performed work in the last three years.

**4. Project Management & Organization**

List all staff and/or subcontractors proposed as members of the consultant team and the tasks they will perform on the account. Describe their duties, responsibilities, and concentration of effort applying to each. Please include resumes, curricula vitae or statements of prior experience and qualification (these may be provided as attachments not counting towards overall page limit). An organizational chart showing roles and responsibilities on the project is desirable. The consultant team may include subcontractors; however, the prime respondent will be solely responsible for the management and work-products of the consultant team.

## 5. Cost Proposal

Please provide a signed Cost Proposal reflecting one, all-inclusive price for the scope of service. **It is anticipated that the total budget available for the scope of work outlined in this solicitation will likely be between \$100,000 and \$150,000.** The maximum budget is inclusive of contractor expenses, including travel. These costs should be indicated as a separate line item. Please also include the following, by task and for each staff and/or subcontractor proposed as members of the project team: estimated personnel hours, level of effort, hourly billing rates, other direct costs, and any other relevant information.

<b>SECTION 5 - EVALUATION AND SELECTION</b>
---

Proposals will be reviewed by a Technical Review Committee comprised of staff from state agencies. To advance to the Cost Evaluation phase, the Technical Proposal must receive a minimum of 60 (85.7%) out of a maximum of 70 technical points. Any technical proposals scoring less than 60 points will not have the cost component opened and evaluated. The proposal will be dropped from further consideration.

Proposals scoring 60 technical points or higher will be evaluated for cost and assigned up to a maximum of 30 points in cost category, bringing the potential maximum score to 100 points.

OER reserves the exclusive right to select the individual(s) or firm (vendor) that it deems to be in its best interest to accomplish the project as specified herein; and conversely, reserves the right not to fund any proposal(s).

Proposals will be reviewed and scored based upon the following criteria:

Scoring Criteria	Description	Possible Points
Technical Proposal	<ul style="list-style-type: none"> <li>• The quality of the Proposal demonstrates the candidate’s ability to provide superior expertise for conducting EM&amp;V studies for solar and/or system reliability programs</li> <li>• The proposed approach meets the needs and criteria set forth in the RFP</li> </ul>	35
Qualifications & Experience	<ul style="list-style-type: none"> <li>• The candidate has completed similar projects and is qualified to undertake the scope of work outlined in the RFP</li> <li>• References and prior work demonstrate the candidate’s ability to provide superior technical expertise, data analysis, and impact and process evaluation services</li> </ul>	25
Project Management & Organization	<ul style="list-style-type: none"> <li>• Proposal shows clarity of team management structure, the availability of senior staff to supervise and contribute to the work, and ability to complete deliverables in a timely fashion</li> </ul>	10
<b>Total Possible Technical Points</b>		<b>70</b>
Cost Proposal*	<ul style="list-style-type: none"> <li>• The candidate submits a reasonable and competitive pricing structure commensurate with the value offered</li> </ul>	30
<b>Total Possible Points</b>		<b>100</b>

## APPENDICES

- 1. Attachment A: 2014 Peregrine Energy Group, Inc. Report: “Solar PV for Distribution Grid Support: The Rhode Island System Reliability Procurement Solar Distributed Generation Pilot Project”**
- 2. Attachment B: SRP Incentive Methodology Document**
- 3. Attachment C: Continuous Recruitment #38 – Solar PV for Distribution Grid Support**
- 4. Attachment D: Solar-Log 360 and GE Meter Specifications**
- 5. Attachment E: Locus Energy LGate 360 Specifications**