

State of Maine
Master Score Sheet

RFP# 202409166					
Consulting Services to Design Time of Use Rates for Residential Electric Customers					
Bidder Name:		Energy + Environmental Economics	Exeter Associates	London Economics	The Brattle Group
Proposed Cost:					
Scoring Sections	Points Available				
Section I: Preliminary Information	N/A				
Section II: Organization Qualifications and Experience	35	22	30	15	35
Section III: Proposed Services	30	20	25	8	28
Section IV: Cost Proposal	35	10.2	35	29.23	8.24
TOTAL	<u>100</u>	<u>52.2</u>	<u>90</u>	<u>52.23</u>	<u>71.24</u>

Award Justification Statement
RFP# 202409166
Consulting Services to Design Time of Use Rates for Residential Electric Customers

I. Summary

The Commission is seeking a consultant to assist us with the development of an electric rate design for residential and small commercial customers taking both transmission and distribution as well as standard offer service that is time of use (TOU) meaning higher rates in the higher cost hours of the day, and lower rates during lower cost hours of the day.

II. Evaluation Process

The evaluation team followed the prescribed bid review process. The team included three experienced utility analysts familiar with rate design including TOU rates and an attorney familiar with rate design and with the Commission's authority to implement this type of rate.

III. Qualifications & Experience

- Familiarity with Maine utility rate design and standard offer
- Experience in other states that use TOU rate, particularly PA.
- Experienced firm with good credentials
- The Team assigned to this task is very experienced
- The Bid showed attention to detail that conveyed how the firm would approach the work

IV. Proposed Services

- Good list of proposed customer education methods
- Plan showed detailed knowledge of the regulatory landscape
- Insight into practical considerations of TOU implementation
- Discussed use of reconciliation of revenues to help with default service not procured by utilities; can address potential resistance of bidders to TOU specifications – bidder showed creativity and ability to think outside the box

V. Cost Proposal

The winning bidder had the lowest price bid at \$87,415. The other three bids came in at \$104,665, \$299,960 and \$371,310.

VI. Conclusion

Exeter, the winning bidder, submitted a very strong proposal, covering many of the areas the Commission was seeking. It also had a bid that was less than $\frac{1}{4}$ the cost the highest bid submitted by a highly qualified bidder.



STATE OF MAINE
PUBLIC UTILITIES COMMISSION

Philip L. Bartlett II
CHAIR

Patrick J. Scully
Carolyn C. Gilbert
COMMISSIONERS

Amy Dumeny
ADMINISTRATIVE DIRECTOR

November 12, 2024

Matthew Hoyt, VP, Principal
Exeter Associates, Inc.
10480 Little Patuxent Parkway, Suite 300
Columbia, MD 21044

SUBJECT: Notice of Conditional Contract Award under RFP # 202409166, Consulting Services to Design Time of Use Rates for Residential Electric Customers

Dear Mr. Hoyt:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Public Utilities Commission for Consulting Services to Design Time of Use Rates for Residential Electric Customers. The Commission has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Commission is hereby announcing its conditional contract award to the following bidder:

- Exeter Associates, Inc.

The bidder listed above received the evaluation team's highest ranking. The Commission will be contacting the aforementioned bidder soon to negotiate a contract. As provided in the RFP, the Notice of Conditional Contract Award is subject to execution of a written contract and, as a result, this Notice does NOT constitute the formation of a contract between the Commission and the apparent successful vendor. The vendor shall not acquire any legal or equitable rights relative to the contract services until a contract containing terms and conditions acceptable to the Commission is executed. The Commission further reserves the right to cancel this Notice of Conditional Contract Award at any time prior to the execution of a written contract.

As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

This award decision is conditioned upon final approval by the State Procurement Review Committee and the successful negotiation of a contract. A Statement of Appeal Rights has been provided with this letter; see below.

Thank you for your interest in doing business with the State of Maine.

Sincerely,

A handwritten signature in blue ink that reads "Amy Dumeny".

Amy Dumeny
Administrative Director

STATEMENT OF APPEAL RIGHTS

Any person aggrieved by an award decision may request an appeal hearing. The request must be made to the Director of the Bureau of General Services, in writing, within 15 days of notification of the contract award as provided in 5 M.R.S. § 1825-E (2) and the Rules of the Department of Administrative and Financial Services, Bureau of General Services, Office of State Procurement Services [formerly the Division of Purchases], Chapter 120, § (2) (2).



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ADMINISTRATIVE DIRECTOR

November 12, 2024

Eric Cutter, Partner
Energy and Environmental Economics, Inc.
44 Montgomery St., Suite 1500
San Francisco, CA 94104

SUBJECT: Notice of Conditional Contract Award under RFP # 202409166, Consulting Services to Design Time of Use Rates for Residential Electric Customers

Dear Mr. Cutter:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Public Utilities Commission for Consulting Services to Design Time of Use Rates for Residential Electric Customers. The Commission has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Commission is hereby announcing its conditional contract award to the following bidder:

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Amy Dumeny
Administrative Director

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STATE OF MAINE
PUBLIC UTILITIES COMMISSION

Amy Dumeny
ADMINISTRATIVE DIRECTOR

Patrick J. Scully
Carolyn C. Gilbert
COMMISSIONERS

November 12, 2024

Ms. Marie Fagan, Chief Economist
London Economics International LLC
717 Atlantic Ave., Suite 1A
Boston, MA 02111

SUBJECT: Notice of Conditional Contract Award under RFP # 202409166, Consulting Services to Design Time of Use Rates for Residential Electric Customers

Dear Ms. Fagan:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Public Utilities Commission for Consulting Services to Design Time of Use Rates for Residential Electric Customers. The Commission has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Commission is hereby announcing its conditional contract award to the following bidder:

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Amy Dumeny
Administrative Director

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ADMINISTRATIVE DIRECTOR

November 12, 2024

Sanem Sergici, Principal
The Brattle Group, Inc.
One Beacon St., Suite 2600
Boston, MA 02108

SUBJECT: Notice of Conditional Contract Award under RFP # 202409166, Consulting Services to Design Time of Use Rates for Residential Electric Customers

Dear Ms. Sergici:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Public Utilities Commission for Consulting Services to Design Time of Use Rates for Residential Electric Customers. The Commission has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Commission is hereby announcing its conditional contract award to the following bidder:

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Sincerely,

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Amy Dumeny
Administrative Director

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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER: Exeter

DATE: November 5, 2024

SUMMARY PAGE

Department Name: Maine Public Utilities Commission

Name of RFP Coordinator: Celeste Gaylord

Names of Evaluators: Eric Bryant, Sally Zeh, Jameson McBride, Ethan Grumstrup

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• List all other pass/fail criteria of the RFP, if any.	N/A	N/A
•		
•		
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	30
Section III. Proposed Services	30	25
Section IV. Cost Proposal	35	35
<u>Total Points</u>	<u>100</u>	<u>90</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER: Exeter

DATE: November 5, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER: Exeter

DATE: November 5, 2024

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	30

Evaluation Team Comments:

I. Overview of the Organization

- Deep knowledge of Maine, including NMISA
- Work with OPA on SOS
- Detailed attention to the substance of RFP
- PA residential troubled TOU project very applicable here
- Experience with peak and off peak pricing
- No stated experience with customer education
- Experience in rate design and supply acquisition
- WattBuy is interesting, data base could add value
- Experience collecting data on TOU in other states
- Principal assigned to lead – highly experience, but does not have significant TOU experience

•

II. Subcontractors

- OK

III. Organizational Chart

- OK

IV. Litigation

- OK

V. Financial Viability

- OK

VI. Certificate of Insurances

- OK

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409166
RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers
BIDDER: Exeter
DATE: November 5, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	30	25

Team consensus notes

- Included list of potential customer education methods
- Maine specific – with a clear idea how it would use this information
- Good that it cited TX and ME as two restructured states with SOS.
- Talked about use of reconciliation of rev to help with default service not procured by utils; resistance of bidders to TOU specifications – bidder is creative and thinks outside the box
- Insight into practical considerations of TOU implementation
- Good description of using flat rate to set TOU rates by applying ratio

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER: Exeter

DATE: November 5, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
87,415	,	87,415	x	35 points	=	35

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER: E3

DATE: November 5, 2024

SUMMARY PAGE

Department Name: Maine Public Utilities Commission

Name of RFP Coordinator: Celeste Gaylord

Names of Evaluators: Eric Bryant, Sally Zeh, Jameson McBride, Ethan Grumstrup

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
<ul style="list-style-type: none"> • List all other pass/fail criteria of the RFP, if any. • • 	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	22
Section III. Proposed Services	30	20
Section IV. Cost Proposal	35	10.2
<u>Total Points</u>	<u>100</u>	<u>52.2</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER: E3

DATE: November 5, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER: E3

DATE: November 5, 2024

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	22

Evaluation Team Comments:

- I. Overview of the Organization
 - Experience with CA default TOU relevant to our needs
 - Overall TOU experience OK, but somewhat limited
 - Standard offer experience, including pricing and bidder, from buyer and seller
 - No customer education experience
 - Lots of utility and analytical experience, but not much is specific to Maine
 - Will provide cost/benefit model for Staff use
 - Included information on price elasticity
 - Positive past work for MPUC, but not on this issue
- II. Subcontractors
 - OK
- III. Organizational Chart
 - OK
- IV. Litigation
 - OK
- V. Financial Viability
 - OK
- VI. Certificate of Insurances
 - OK

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER: E3

DATE: November 5, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	30	20

Team Consensus Evaluation Notes

- Same person (Schwartz) assigned to all tasks – is that doable given the tasks are overlapping?
- Unclear if proposed work on TOU models includes default supply connection
- Prepared a list of jurisdictions for interviews
- Showed attention to TOU cost/benefit, potential impacts to measure
- Very little is specific to ME; does not appear to understand that Maine has existing TOU rates
- Excel tool/model to be developed and provided
- Comprehensive report not included in bid services

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER: E3

DATE: November 5, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
87,415	,	299,960	x	35 points	=	10.2

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER: LEI

DATE: November 5, 2024

SUMMARY PAGE

Department Name: Maine Public Utilities Commission

Name of RFP Coordinator: Celeste Gaylord

Names of Evaluators: Eric Bryant, Sally Zeh, Jameson McBride, Ethan Grumstrup

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
<ul style="list-style-type: none"> • List all other pass/fail criteria of the RFP, if any. • • 	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	15
Section III. Proposed Services	30	8
Section IV. Cost Proposal	35	29.23
<u>Total Points</u>	<u>100</u>	<u>52.23</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER: LEI

DATE: November 5, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER: LEI

DATE: November 5, 2024

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	15

Evaluation Team Comments:

- I. Overview of the Organization
 - Clearly experience in electric/regulatory work, but no TOU rate design experience mentioned, and though the firm has rate design experience, no one assigned to this has any
 - Significant modelling and expert consulting; POOPMod ISO-NE tool could be useful to estimate impacts of supply TOU
 - Market simulation software – helpful for bidding behavior
 - Sample projects not on point
- II. Subcontractors
 - OK
- III. Organizational Chart
 - OK
- IV. Litigation
 - OK
- V. Financial Viability
 - Not provided – only if awarded
- VI. Certificate of Insurances
 - OK

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER: LEI

DATE: November 5, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	30	8

Team Consensus Notes

- No detail on possible customer blow-back
- "12 hr/12hr" is off the mark - this is concerning
- Has recently modeled SOS procurement/risk premium, but was not a great product
- Poor description of SOS risk premium
- The entire bid itself was not clean and clear
- Bid included, essentially, a generic "we can do this"

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER: LEI

DATE: November 5, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
87,415	,	104,665	x	35 points	=	29.23

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER: Brattle

DATE: November 5, 2024

SUMMARY PAGE

Department Name: Maine Public Utilities Commission

Name of RFP Coordinator: Celeste Gaylord

Names of Evaluators: Eric Bryant, Sally Zeh, Jameson McBride, Ethan Grumstrup

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• List all other pass/fail criteria of the RFP, if any.	N/A	N/A
•		
•		
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	35
Section III. Proposed Services	30	28
Section IV. Cost Proposal	35	8.24
<u>Total Points</u>	<u>100</u>	<u>71.24</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER: Brattle

DATE: November 5, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER: Brattle

DATE: November 5, 2024

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	35

Evaluation Team Comments:

- I. Overview of the Organization
 - Very experienced with all aspects of TOU, including customer education
 - Specific related experience - LIPA, Ontario
 - Knowledgeable in SOS bidding behavior
 - Has highly developed analytical tools
 - Hard to find something lacking
 - Directly involved with Maine policy
- II. Subcontractors
 - OK
- III. Organizational Chart
 - OK
- IV. Litigation
 - OK
- V. Financial Viability
 - Provided certification from auditor
- VI. Certificate of Insurances
 - OK

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER: Brattle

DATE: November 5, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	30	28

-
- Proposal is very detailed, on point, matching our needs
 - Has existing data and will supplement existing research.
 - Will use its own "Arcturus" data base
 - Has created and will use other tools it has developed on TOU
 - Well laid-out work plan, good description of deliverables
 - Have already looked at Maine's existing TOU rates

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER: Brattle

DATE: November 5, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
87,415	,	371,310	x	35 points	=	8.24

Evaluation Team Comments:

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: Exeter

DATE: November 4, 2024

EVALUATOR NAME: Eric Bryant

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is required that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- 40 years, energy economics, reg consulting
- P - Expert testimony
- FERC, many state commissions, rate design
- P – knowledge of Maine, restructuring, SOS
- P – TOU challenges w/ SOS
- P- Experience collecting data on res TOU for dozens of major elec utils, best practices
- OPA – retail competition, improv in SOS
- P – Northern Maine energy issues – efficiencies – work with ME stakeholders
- P – extensive work with incorporating res TOU w/ SOS, Penn
- PA – worked with PA Cons adv – Duquense failed TOU (insufficient bidders) Proxy TOU Prices derived from wholesale costs
- P – experience w/ info about peak/off peak. WattBuy (complex res TOU tariffs, potential structures used nationwide, WattBuy peak/off peak data – use in this work
- P – supply market default provider experience NH. Capacity markets (PJM)
- I- WattBuy – intriguing work – “improved energy usage estimates at household level” consumption patterns, tech adoption, detailed rate data for res TOU

2. Subcontractors

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: Exeter

DATE: November 4, 2024

EVALUATOR NAME: Eric Bryant

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

- *None*
- 3. *Organizational Chart*
 - *Hoyt – competitive retail mkts, supply acquisition, bill/rate analysis; DSM,*
 - *Ogur – supply contracts, rates/tariffs, energy mkts, default design,*
 - *Kuykendall -*
- 4. *Litigation*
 - *None*
- 5. *Financial Viability*
 - *Provided*
- 6. *Certification of Insurance*
 - *Provided*

II. Proposed Services

1. Services to be Provided

- *Summary points out that ME is only NE state that uses CEPs to provide SOS (other states req utils to procure)*
- *Summary shows Exeter's familiarity with ME*
- *P – will use existing and original research*
- **Lessons learned**
- *P – Longstanding expertise in rate design*
- *Need for understandability*
- *TOU rates go to variety of policy objectives – peak shaving, accurate cost of service, reduce cross subsidization*
- *P – Familiarity with ME SOS - will use for perspective*
- *Cites Leg Resolve and subsequent inquiry*
- *Rev of other states - in other TOU states, rates are derived from existing flat rate w/ ratio applied.*
- *Will focus on restructured states, but also look at vert integ states*
- *Will use info found in research to compile database – price ratios, deployment strategy, specified objectives, TOU policy*
- *P - Nice Table 2 showing design considerations from prev work.*
- **Implementation considerations**
- *Table 3 shows cust ed strategies*
- *Best practices for utils*
- **Opt-in/Opt-out**

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: Exeter

DATE: November 4, 2024

EVALUATOR NAME: Eric Bryant

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

- *Very important*
- *PA – insufficient uptake leads to limited peak shaving*
- *Can use reconciliation mechanism to increase TOU market signal (?)*
- *Table 4 shows pros/cons or opt-in/opt-out*
- *P - Will estimate participation under each option*
- **Peak/Off peak ratio**
- *P - Lists areas to research ratios: EIA, WattBuy database – will use to create econometric model w/ variables like adoption, price diff, res usage, region, state stuff.*
- *Refs Brattle's Arcturus!*
- **Supplier Bidding**
- *TOU cd discourage bidding, large tranche, small tranche, quick PUC turnaround,*
- *Will get data on ME bidding, help develop approaches,*
- *P – “Ground up” cost estimates, use them here*
- *P – knowledgeable about supply issues*
-
-

2. Implementation – Work Plan

- *P – Managed by Hoyt, a principal at Exeter*
- *Gantt chart shows work plan*
- *Hourly time estimates for consultants*
- *Will coordinate with Staff.*
-

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: Exeter Associates

DATE: Nov 1, 2024

EVALUATOR NAME: S Zeh

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Experienced. Work in energy policy, electrification policy, standard offer design, and rate design – among others.*
- *Unclear how relevant past Maine OPA work is.*
- *On Page 3 of file 2 Exeter references "above mentioned study of default electric service" but it is unclear exactly what the nature of that study was.*
- *Some experience with residential TOU in PA could be useful. Insight into proxy TOU prices could be useful.*
- *Sample projects do not appear to be on point. PA work may be related, although description appears to be much broader than what MPUC is seeking.*

2. Subcontractors

- *none*

3. Organizational Chart

- *Lead project manager highly experienced but does not appear to have extensive TOU experience.*

II. Proposed Services

1. Services to be Provided

- *SOW is high level and lacks specificity. Perhaps too much focus on SOS procurement and not enough on the other objectives identified in the RFP.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

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BIDDER NAME: Exeter Associates

DATE: Nov 1, 2024

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EVALUATOR DEPARTMENT: Maine Public Utilities Commission

- *How Exeter intends to assess opt-in/out options is not clearly defined. Appears to rely on existing knowledge and experience; additional proposed research is unclear.*

2. Implementation – Work Plan

- *Basic yet logical workplan.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: Exeter Associates

DATE: 10/28/24

EVALUATOR NAME: Jameson McBride

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

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Individual Evaluator Comments:

I. *Organization Qualifications and Experience*

1. *Overview of Organization*

- **Positive: Great amount of relevant experience in Maine (e.g. OPA report on SOS procurement which apparently included a TOU specific portion)**

1. *Unique knowledge of northern maine ISA*

- **Positive: Specific project on difficulties of implementing TOU supply in restructured markets in PA**
- **Positive WattBuy – unique peak/offpeak differential analysis dataset**

2. *Subcontractors*

- *None*

3. *Organizational Chart*

- *Looks like a good team, quite large? Mostly defense industry / federal defense clients mentioned, which seemed like a surprise*

4. *Litigation*

- *None*

5. *Financial Viability*

- *Provided all statements. They run a net loss, but it is probably intentional (pay out all profits to employees), they have had positive cash flow with decent reserves*
- *Their financial viability depends heavily on a few contracts (see p. 21)*

6. *Certificate of Insurance*

- *Provided as asked, and appears standard*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Exeter Associates

DATE: 10/28/24

EVALUATOR NAME: Jameson McBride

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

II. Proposed Services

1. Services to be Provided

- *Proposal is not structured very clearly, no TOC?*
- *Positive: Very maine specific – demonstrates deep understanding and experience with Maine electricity markets and utilities*
- *Seems more analytical about the idea of TOU – not very “implementation focused” this could be a negative based on the posture of this proceeding*
- *Very positive: Summary of the comments in Maine PUC Docket 2023-19, shows a lot of research (p. 4)*
- *P. 7 – reconciliation method for SOS mentioned – which Staff has discussed internally – potentially positive*
- *Neg – seems like they are taking non-opt-out too seriously*
- *Pos – all tables are good, they show initial research*
-

2. Implementation – Work Plan

- *Looks good – Gantt chart & hours est, not as much qual detail*
-

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: Exeter Associates, Inc.

DATE: 10/22/2024

EVALUATOR NAME: Ethan Grumstrup

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Qualifications and Experience

A. Overview of the Organization

- P – Quantitative and Qualitative analysis capabilities
- P – Experience with electric supply procurement planning
- P – Experience with the NMISA region and ISONE region of Maine
- P – Experience assessing peak/off-peak price differentials
- P – Access to TOU data
- P – Recent projects are somewhat related to the RFP
- I – Staff appear in FERC proceedings regularly
- N – No experience with customer education strategies

B. Organizational Chart

- P – Experience with TOU rate design
- P – Familiarity with TOU structures in restructure and vertically integrated markets
- P – Expertise in energy supply acquisition, utility bill and rate analysis, electric supply pricing
- P – Experience with expert testimony
- I – Experience with customer surveys

Financial viability and certificate of insurance provided

II. Proposed Services

A. Services to be Provided

- P – List of potential customer education methods

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 10/22/2024

EVALUATOR NAME: Ethan Grumstrup

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

P – Shows good understanding of the tasks

P – Shows deeper insights into practical considerations of implementing TOU

N – Proposal to provide background on TOU adoption in Maine is unnecessary

Meets the requirements of the RFP

B. Work Plan

Fits the RFP timeline

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: E3

DATE: November 4, 2024

EVALUATOR NAME: Eric Bryant

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *P – large organization w/ experience in regulated energy, grid planning; 30 yr experience*
- *Work for utils, regulators, policy makers*
- *P – work on rate design “particularly TOU”*
- *P – assessment of utility rev req, grid customer an supplier impacts, policy goals*
- *P – highly experienced in analyzing rate structures on customers.*
- *P – exp on buyer and seller side of standard offer. Strategic advice*
- *CA – work on rate design, customer impacts, graduated SO rates based on customer income*
- *MA – rate design MA IRWG – Household energy expenditure model*
- *HI – EV charging rates, rate design calculator of cost-benefit*
- *CA – default TOU rates for residential*
- *Expert testimony*
- *Minn – TOU rates for EV owners*
- *Israel – TOU industrial rates*
- *I – affordability considerations work for CA, HI and NY.*
- *I – experience leading projects (MA, NY, RI)*

2. Subcontractors

- *None*

3. Organizational Chart

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

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DATE: November 4, 2024

EVALUATOR NAME: Eric Bryant

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

- *Cutter – EV, DR, forecasting and D planning,*
- *Heavy – EV, rate design*
- *Schwartz – GHG, electrification, decarbonization. Worked an Nat Grid*
- *Orans – Long experience*
- *Gold-Parker – Solar, climate, DERs, Modeling, electricifaction/peak loads*
- *Platter (they/them) – bill impacts, rate design, cust affordability,*
- *Bargholz – forecasting, strategy for solar and storage, Nexamp,*
- *N – no one has TOU experience*

4. *Litigation*

- *None*

5. *Financial Viability*

- *Provided*

6. *Certification of Insurance*

- *Provided*

II. *Proposed Services*

1. *Services to be Provided*

- *P - NE-based team*
- **Existing TOU models**
- *ID relevant jrs*
- *Table 1 – illustrative set of jrs w/ TOU (no mention of SOS)*
- *Will prepare list of TOU rates/structures for IDed jrs*
- *P - Will look a cust ed experience, including digital ads, workshops, bill inserts, monitoring tools. Look at challenges faced and successful strategies*
- *Will examine overall performance and impact in each jrs*
- *Take-up rates, peaks shaved*
- *E3 says acceptance rate is directly tied to deployment method*
- *Offer recommendations for ME*
- *Deliverable*
- **Benefits and Risks**
- *Good desc of B/R including peak chasing*
- *Will prepare illustratative TOU structures and model B/R. Collaborate w/ staff*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: November 4, 2024

EVALUATOR NAME: Eric Bryant

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

- *Quantitative analysis of B/R – Excel tool*
- *Fig 2 – detailed overview of tool*
- *Fig 3 sampl tool outputs*
- *P - Prepare report on findings, including recommendations how to maximize B, minimize R. Tailored to specific ME market, cust, regulation. Collaborate w/ Staff*
- *Deliverable*
- **Customer Acceptance**
- *Quan/Qual analysis*
- *Lit review – look at customer reactions to price ratio, participation and enrollment)(build on prior lit reviews)*
- *Table 2 Illustrative data set*
- *Analysis of how various ratios could affect ME cust – excel tool, seasonality – Staff and stakeholders*
- *P -Examine psychological and behavioral factors w/ cust/accept*
- *P- Energy literacy, Lack of trust of util, perception of complexity, ability to adjust usage, inertia*
- *P- based on this, E3 will recommend specific outreach, ed and support strategies.*
- *P – possible tools incl personalize billing info, dedicated hotlines, online resources, real-time monitoring tools, cust serv enhancements, mobile applications*
- *P - Report on findings on customer acc/cust-education. Deliverable*
- **SOS Bidding**
- *Review current process, level of competition*
- *Next, eval potential effects of TOU rate structures on bidding. New tool, based on tool above.*
- *E3 has supported bid pricing (NJ, MD) on both sides of transaction, can build on that. Will TOU cause bidders to drop out?*
- *Report on findings: predicted effects of TOU structures, how to structure bids, highlight risks*
- **Optional TOU comprehensive report**
- **Optional stakeholder meetings**
- *E3 has experience running stk meetings; reputation of expert mediation (not in bid cost, but at time and materials)*
- **Optional – expert witness/testimony**
-

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: November 4, 2024

EVALUATOR NAME: Eric Bryant

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

2. Implementation – Work Plan

- *Kick-off meeting – agree on time and tasks*
- *Timeline - comprehensive*
-
-

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: E3

DATE: Nov 1, 2024

EVALUATOR NAME: S Zeh

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Rate design experience. Example projects are not directly related to TOU despite stating E3 has TOU experience. CPCU project possibly directly related, but shown as an "additional" example and not much detail provided.*
- *Positive past MPUC experience, unrelated to current topic*

2. Subcontractors

- *none*

3. Organizational Chart

- *Experienced team, but perhaps not a lot of TOU implementation experience.*

II. Proposed Services

1. Services to be Provided

- *Review of existing TOU models. Unclear whether focus is on jurisdictions with default TOU or optional.*
- *Evaluation of customer education strategies.*
- *Lessons learned report by March 2025*
- *Cost benefit analyses – will provide excel-based tool with final report*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: Nov 1, 2024

EVALUATOR NAME: S Zeh

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

- *Includes customer acceptance research, but unclear whether the proposal includes substantive review of successful customer education/outreach methods*
 - *Development of supplier bidding behavior tool. Maine's procurement process may be substantively different than other states.*
 - *Optional comprehensive report – is this included in proposed price?*
2. *Implementation – Work Plan*
- *Completion by end of April 2025 assuming Nov start.*
 - *Collaborative workplan development with staff.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: E3

DATE: 10/28/24

EVALUATOR NAME: Jameson McBride

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Considerable experience in TOU, rate design, evaluation*
- *Standard offer supply experience on both buyer and seller side*
- *Stakeholder engagement experience*
- ***Positive: Worked on CA default TOU – very relevant to this project***
 1. ***CA Res. Energy Cost Calc looks interesting – forecasts total residential bills for years going forward (for IRP process but could be useful here?)***
 2. ***Lots of stakeholder engagement experience with regard to rate design***

2. Subcontractors

- *None*

3. Organizational Chart

- *Looks like a large and qualified team*
 1. *At least one person (Kenzie Schwartz?) appears to be in Maine*
 2. *Includes Ren Orens, the founder of E3*
 3. *Includes a lot of electrification and rate design experience, but **somewhat glaringly no TOU experience?***

4. Litigation

- *None*

5. Financial Viability

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine Public Utilities Commission

- *They are the subsidiary of a public company – provided SEC disclosures*
- 6. *Certificate of Insurance*
 - *Provided requested info, looks normal*

II. Proposed Services

1. Services to be Provided

- **Negative: entire proposed services doc is not very Maine specific.**
- **Minor negative: The proposal does not seem to recognize that Maine has existing TOU rates, it seems to think we are starting from square 1, and doesn't really make the distinction between optional TOU and opt-out**
- **Report on lessons learned – looks reasonable, and detailed workplan, they've done lots of prep on TOU elsewhere**
- **Benefits/risk "Tool" analysis seems like it makes sense with heat map, although it doesn't really seem to be specific to default supply/delivery issues, but more generally applicable to TOU**
 1. **Seems like a relatively simple Excel model that Staff could likely pull together, although the visualizations are nice**
- **Positive: Customer acceptance analysis – excellent focus on elasticity**
- **Supplier analysis – extensive description, seems reasonable**
- **Optional services**
 1. **Comprehensive report from all tasks (seems weird this is optional?)**
 2. **Stakeholder meetings**
 3. **Expert witnesses and testimony (Ren Orans and Ari Gold-Parker)**

2. Implementation – Work Plan

- **Looks reasonable and very detailed with Gantt chart by subtask**
- **Possible minor negative: Kenzie Schwartz leads every task, seems like maybe too much given they're running simultaneously?**
- **No other issues. Seems reasonable. Not sure about hours estimate, that depends on budget**

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: Energy and Environmental Economics, Inc.

DATE: 10/22/2024

EVALUATOR NAME: Ethan Grumstrup

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

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Individual Evaluator Comments:

I. Qualifications and Experience

A. Overview of the Organization

P – Experience with TOU rate design and analysis

P – Quantitative analysis capability

P – Experience with Standard offer service procurement including pricing and bidding behaviors.

P – Assessment of TOU rate design and bill comparison.

P – Experience in Massachusetts and Rhode Island

I – Experience with stakeholder engagement

I – Past work on energy affordability

N – Presents a lot of irrelevant experience

N – No experience with customer education on TOU

N – No expertise analyzing peak/off-peak differentials

B. Organizational Chart

P – Analytical skills

P – Experience giving expert testimony

Q – Team has worked on rate design but not a stated expertise

N – No stated experience with supply procurement or bidding strategies

Financial Viability and Certificate of Insurance provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: Energy and Environmental Economics, Inc.

DATE: 10/22/2024

EVALUATOR NAME: Ethan Grumstrup

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

II. Proposed Services

A. Services to be Provided

- P – Prepared list of jurisdictions to interview
- P – Some deeper understanding of the required tasks.
- P – Contemplates potential costs and benefits of TOU
- P – Presents potential impacts to measure
- I – Preliminary list of literature to review

B. Workplan

Fits the RFP timeline

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: London Economics

DATE: November 1, 2024

EVALUATOR NAME: Eric Bryant

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

- *Overview of Organization*
 - *P – lots of experience with rate design, default supply, and NE markets. Experienced in complex regulated electric utility issues.*
 - *P – World-wide experience in variety of area and markets*
 - *P – expert witness experience (w/ MPUC)*
 - *P - Would be strong on the standard offer bidding and peak shaving piece*
 - *P – Would be strong on the issue of peak/off peak differential*
 - *P- ISO-NE simulation model for energy and capacity markets*
 - *Unclear that LEI has direct experience with TOU rates (It noted its rate design experience, and did not list TOU work)*
- *Subcontractors*
 -
 -
 -
- *Organizational Chart*
 - *P- I have worked with Marie Fagan and found her work to be good.*
 1. *No mention of TOU*
 - *P- Brian Redmond – experience with ME SOS procurement*
 1. *No mention of TOU*
 - *Julia and Hannah – seem highly experienced, but not with TOU*
- *Litigation*
 - *None*
 -

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: London Economics

DATE: November 1, 2024

EVALUATOR NAME: Eric Bryant

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

- *Financial Viability*
 - *Certificate of good standing in Mass*
 - *Q.-Will provide financials if awarded*
- *Certification of Insurance*
 - *OK*

II. Proposed Services

- *Services to be Provided*
 - **Lessons learned**
 - *Will do comprehensive rev of other jrs, including cust ed materials; will do stakeholder work – experience, esp in NE.*
 - **Benefits and risks**
 - *High level description of opt-in/opt-out*
 - *P – good list of benefits*
 - *Ok list of risks. Doesn't go into any detail about customer blow-back*
 - **Peak/Offpeak**
 - *Skilled at modeling*
 - *Sees need to align T&D with Supply peaks*
 - *Otherwise, generic "we can do this"*
 - **SOS bidding behavior**
 - *LEI highly experienced with modelling bidder behavior*
 - *LEI has recently modelled SOS procurement/risk premium*
 -
- *Implementation – Work Plan*
 - *Kick-off meeting*
 - *Monthly check-ins*
 - *Fig 1 proposed sked*
 - **Lesson Learned**
 - *Short list of jrs to be researched*
 - *Research shortlist jrs – LEI team is highly knowledgeable about rates in ME and NE, and can procure information. Exp benchmarking and will find jrs that include SOS inTOU*
 - *Rev cust ed strategies, methods (sample from Liberty in NH)*
 - *Deliverable on lessons learned - nice detail on questions to be answered (but no mention of blow-back)*

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EVALUATOR NAME: Eric Bryant

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- **Benefits and Risks**
- *Define what opt-in and opt-out mean for cust, utils and suppliers*
- *Expand on C/B from MPUC report and 231 docket.*
- *Risks include need to adjust billing system, or SOS Procurement process*
- *Qualitative comparison of diff TOU rates – find best ones*
- **Peak/Offpeak diff**
- *Gather data (from CMP/VP) to devise optimal ratio. May also look to other jrs. Wd be useful to hear from customers about differential*
- *N – Does LEI think the Leg Report has locked us in?(12hr/12hr peak offpeak?)*
- *P - Proposes alternative scenarios – scenario analysis*
- **SOS bidding implications**
- *3 workstreams*
- *Collect data – forward prices, loss factors, capacity payments*
- *Bid set by perceived risk. By looking at supplier risk, can better predict behavior.*
- *Formula for risk/bids*
- *Assess risk v. MPUC goals*
- *Deliverable*
-

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: S Zeh

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- *Sample projects on pages 5-7 of file 2 are not obviously on point*
- *Clearly experienced, although specific rate design (and more specifically TOU rate design) experience is not as clearly defined.*
-

2. Subcontractors

- *None specified.*

3. Organizational Chart

- *M. Fagan proposed project manager. Positive experience with Ms. Fagan on prior engagements.*
- *Project team does not appear to have much TOU rate design experience.*

II. Proposed Services

1. Services to be Provided

- *Proposal states "LEI understands that the main objective of this engagement is to provide a greater understanding the impact TOU rates may have on the Maine residential standard offer service ("SOS")" This is only a portion of what the MPUC intends from the RFP*
- *Workplan covers all required topics, but is rather high level and lacks specificity*
-

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: London Economics

DATE: Nov 1, 2024

EVALUATOR NAME: S Zeh

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

2. Implementation – Work Plan

- *Logical workplan including review of other jurisdictions*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: London Economics

DATE: 10/28/24

EVALUATOR NAME: Jameson McBride

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- **File 2 pdf p. 9 : No specific TOU rate design experience?**
- *File 2 pdf p. 9: POOLMod ISONE market model could help for estimating impacts of supply TOU, as well as their "game theoretic" outlook*
 1. *Focus appears to be more on "forecasting long-term power prices in north America" not sure if POOLMod would be able to estimate TOU supply bids?*
- *We are very familiar with LEI from our past projects with them and they always do a good job. I think they would be able to handle this project but it is surprising to me that they do not appear to have any TOU specific experience.*

2. Subcontractors

- *None mentioned.*

3. Organizational Chart

- *No major issues. I am familiar with Marie Fagan and Brian Redmond, but not Hannah Braun. Brian Redmond seems low-experience. Marie Fagan is very good.*

4. Litigation

- *None. No issues.*

5. Financial Viability

- **Did not provide the requested information, look into this to check to see if they provided it later**

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: London Economics

DATE: 10/28/24

EVALUATOR NAME: Jameson McBride

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

1. **Only provided LLC certification from 2000 in the proposal.**
 6. *Certificate of Insurance*
 - *Appears to be standard and adequate*
- II. *Proposed Services*
1. *Services to be Provided*
 - *Odd dates/formatting in this file (File 3) including wrong dates and missing references on pdf p.2*
 - *Workplan tasks:*
 1. *TOU lessons learned from other jurisdictions*
 2. *TOU benefits and risks*
 3. *TOU peak/offpeak differential impact on customer acceptance*
 4. *TOU implications on bidding behavior for SOS*
 - *P - This section accurately summarizes the context behind the proposal*
 1. *N- It doesn't really go beyond the RFP or publicly available information directly related to this docket. E.g. it doesn't really bring in any examples from other jurisdictions or academic literature.*
 - *Q//N - Pdf p 6 "12 hr/12 hr"? This is not really what we would envision, everyone has been talking about a narrower peak in the PM...why do they think that is an appropriate structure?*
 2. *Implementation – Work Plan*
 - *Generally, the structure looks ok, appropriate amount of detail*
 - *I'm worried that their implementation plan is too qualitative. I think the RFP is really looking for a consultant to help with quantitative analysis of TOU options.*
 - *E.g. doesn't*
 - *N – "Although the MPUC expects to use a 12hr/12hr peak/offpeak price differential" Where?*
 1. *I don't think this was in the RFP, so I'm not sure where they got this idea*
 2. *It's concerning that they would not get this right.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: London Economics

DATE: 10/28/24

EVALUATOR NAME: Jameson McBride

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

- *N- Risk premium pdf p. 12 – shouldn't this be a ratio as opposed to a difference?*
 1. *Not sure if their proposed methodology for estimating the change in risk premium makes sense*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: London Economic International LLC

DATE: 10/18/2024

EVALUATOR NAME: Ethan Grumstrup

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

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Individual Evaluator Comments:

I. Qualifications and Experience

A. Overview of the Organization

- P – Has worked for MPUC before
- P – Analytical and modeling capability
- P – Tariff design experience
- P – Expertise in performance-based ratemaking
- P – Provides expert testimony
- P – Knowledge of North American and New England electric markets
- P – Past projects include modeling
- N – No past work with residential rate design
- N – No experience with TOU rate design or analysis
- I – Proprietary market simulation software

B. Organizational Chart

- P – experience in modeling, analysis, testimony
- I – experience with Maine Standard Offer procurement

No litigation

Will provide financials if awarded, certificate of good standing included

Certificate of liability included

II. Proposed Services

A. Services to be Provided

Appears to understand the requirements of the RFP

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: London Economic International LLC

DATE: 10/18/2024

EVALUATOR NAME: Ethan Grumstrup

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

B. Work Plan

Fits the RFP timeline

N – The first three tasks lack detail

Q – Where did they get the idea that the Commission will use a 12-hour/12-hour peak/off-peak price differential?

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: Brattle

DATE: November 1, 2024

EVALUATOR NAME: Eric Bryant

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- **TOU**
- Large multi-national organization
- P – regulatory ec and rates; wholesale mks and planning; litigation
- P – rate design – TOU, consumer behavior, program design
- Ameran Missouri – TOU w/ supply
- P - Michigan opt-out TOU
- P - Ontario Energy Board Tech Manual, mandatory TOU
- P- LIPA default TOU, customer response
- Puget Sound – TOU + PTR
- Nova Scotia Power
- MD – two year TOU pilot
- **Customer outreach**
- P - MD – outreach materials, bill impact calculations
- P – Reviewed AZ online comparison tool
- Whitpaper included outreach recommendations
- P - MD utilities – helped w/ marketing TVRs, implementation
- Other various outreach effort
- **SOS Procurements**
- P - Assisted PA suppliers in their competitive bidding strategy
- Risk analysis for block-and-spot power supply
- MD – risk analysis for various standard offer supply strategies
- **New England**

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: Brattle

DATE: November 1, 2024

EVALUATOR NAME: Eric Bryant

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

- *ME GEO Pathway to 2040*
 - *NH EV rates*
 - *VT, MA, RI*
 - *MA wholesale mkt design for clean energy market*
 - **Sample Projects**
 - *P – LIPA designed rate, alternatives, bill impacts, reviewed rates at 9 diff utils w/ TOUs, including lessons learned from roll-out*
 - *Evergy*
 - *First Energy – supply strategies for res; volume risk in supply*
 - *P – more information about Brattle's work at beginning of Services Provided section: Best practices/lessons learned, rate dev and analy, stakeholder mgmt., cust ed, SOS Procurement*
2. *Subcontractors*
 - *None*
 3. *Organizational Chart*
 - *P - Sanem*
 - *P - Shetty – TOU experience at LIPA*
 - *Q.- Kavlak – rate design, but any TOU?*
 - *Hledik – retail rate design, some TVR*
 - *P - Reitzes – competitive procurements*
 - *Powers – competitive procurements*
 4. *Litigation*
 - *None*
 5. *Financial Viability*
 - *?*
 6. *Certification of Insurance*
 - *?*

II. Proposed Services

1. Services to be Provided

- **Lessons Learned**
- *P- will ID lessons learned, leverage Brattle data base, proven practices on cust education, have ongoing contracts w/ utils that are doing TOU.*
- *P - Exp in cust ed, indicates that it knows what is needed - see Fig 1*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Brattle

DATE: November 1, 2024

EVALUATOR NAME: Eric Bryant

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

- *N – says customers are becoming increasingly engaged with energy consumption decisions.*
 - *P – will ID jrs that have TOU w/ supply*
 - *P- research and interviews to get the latest. Database is “unofficial clearinghouse.” Always updated (LIPA, Puget, NSP)*
 - *P- ID lessons learned in cust ed.*
 - *P - mentioned shadow bills, enabling tech, and bill comparison portals*
 - **Benefits and Risks of TOU**
 - *P – somewhat detailed description of simplicity of rates and cust ed, along with peak/offpeak differential. “Arcturus” data base shows cust response to increasing peak price, but then it declines.*
 - *Opt out v. opt in will affect risk*
 - *Will look at existing TOU rates – create PowerPoint*
 - *P - ID and quantify benefits of TOU – will prepare TOU impact model looking a benefits to customers, utilities and the grid. Avoided Gen Capacity, Energy costs, T&D capacity, GHG, reduced DRIP. Bill savings for customers*
 - *ID risks of TOU: Neg cust sentiment, disproportionate impact on low-income; Logistical challenges and costs (upfront costs); Rev adequacy; PRISM – price impact simulation model. TOU Impact Model (deliverable in Excel)*
 - **Peak/Offpeak impact**
 - *Arcturus – observations from over 400 TOUs around the world. Can help find the right ratio. Deliverable – Word report qualitative analysis.*
 - **TOU Impact on SOS**
 - *Risk premiums for SOS – pricing, volume, forecast, credit and shopping risk. Would develop model for Maine based on prior work in MD.*
 - *Load shape diffs, weather, roll-out itself can shift risk*
 - *Forward looking SOS model.*
 - *Optional task – include historical risk from past SOS auctions.*
 - **Optional Task 5 (not included in bid price)**
 - *Work directly with customers thru virtual or in-person meetings*
2. **Work Plan**
- *Fig 4 timeline for each task*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

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BIDDER NAME: Brattle

DATE: November 1, 2024

EVALUATOR NAME: Eric Bryant

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

- *Detailed about deliverables and possible setbacks, one task contingent on a previous step, etc.*
- *Establish schedule for meetings, ID persons of contact*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: Brattle Group

DATE: Nov. 1, 2024

EVALUATOR NAME: S Zeh

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

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Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Large consulting firm*
- Directly relevant experience provided in example projects, e.g. Long Island Power Authority and Ontario Energy Board projects*
- Experience developing customer outreach*
- Some experience analyzing standard offer procurement – may be helpful but Maine tends to be an outlier in how SOS is procured.*

2. Subcontractors

- none*

3. Organizational Chart

- Experienced team*

II. Proposed Services

1. Services to be Provided

- Appear to have significant existing knowledgebase related to topics in this inquiry, including the importance of customer education. Will supplement with additional/new research and interviews.*
- Identification of lessons learned in customer education – how to educate and message to customers.*
- March 2025 'lessons learned' report.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: Brattle Group

DATE: Nov. 1, 2024

EVALUATOR NAME: S Zeh

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

- *Modeling of system costs/benefits. Appear to have existing modeling tools*
 - *Includes assessment of TOU rates on SOS procurement and bidder behavior. Optional historic risk premium analysis – may not be needed and not included in cost proposal.*
2. *Implementation – Work Plan*
- *Logical workplan including kickoff meetings and regular coordination meetings. Detailed.*
 - *All tasks completed by July 2025 based on mid-Nov start date.*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: Brattle

DATE: 10/28/24

EVALUATOR NAME: Jameson McBride

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

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Individual Evaluator Comments:

I. *Organization Qualifications and Experience*

1. *Overview of Organization*

- **Highly relevant + highly qualified with extensive TOU specific project experience**
- *Including supply modeling experience (Reitzes)*
 1. *Not all of these supply projects are particularly applicable to TOU though, but at least they have someone to ask who can model supply bids*
- *New England specific experience -> e.g. **ME GEO 2040 Study**, they are directly involved with ME policy*

2. *Subcontractors*

- *None*

3. *Organizational Chart*

- *Looks good, Sanem should be a good lead, and the team looks well qualified and relatively large*

4. *Litigation*

- *None*

5. *Financial Viability*

- **Did not provide requested info.** *Provided a certification of their audit by their auditor firm BDO*

6. *Certificate of Insurance*

- *Provided and looks standard.*

II. *Proposed Services*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: Brattle

DATE: 10/28/24

EVALUATOR NAME: Jameson McBride

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

1. *Services to be Provided*

- *Tasks: Education, Benefits+Risks, Peak/Offpeak Diff, SOS impacts*
- *They appear to have done a lot of research on this before – like they've done pretty much every aspect of our project I think*
 1. *That's a good thing in my opinion because they're experienced*
 2. *however, a minor concern – how much of the work will be reused – how much might they just take from their past projects? Would that be a problem?*
 - a. *Against this last concern, the entire RFP proposal is very specifically targeted to Maine, so it doesn't seem like a "cookie cutter" proposal at all either*
- **Arcturus** *database of price response to TOU looks very cool and is likely a unique asset they bring to this project*
- **P. 9** – *they've already done research on Maine's existing TOU programs – that's a really good sign*

2. *Implementation – Work Plan*

- *Extensive detail and Gantt chart etc showing workplanning is thorough*
- *No major concerns with their work plan or timeline*
- *P. 16 optional project on historical risk premium – we might be interested in this, we might be interested in pricing, I wonder if other proposals have this included*

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: The Brattle Group, Inc.

DATE: 10/21/2024

EVALUATOR NAME: Ethan Grumstrup

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

I. Qualifications and Experience

A. Overview of the Organization

P – Experience in assessing lessons learned from other jurisdictions using TOU including deployment, customer education, recruitment, and retention.

P – Experience with TOU rate design, opt-in and opt-out.

P – Experience with qualitative and quantitative analysis of TOU rates including load shifting.

P – Experience analyzing Standard Off Service procurement strategies and bidding behavior.

P – Lots of related project experience.

P – Very specific related experience.

P – Familiar with Maine and New England.

I – Experience assessing TOU impacts on low and moderate-income customer.

I – Experience analyzing energy burden/affordability.

I – Reviewed a utility's online bill comparison tool.

I – Experience with stakeholder engagement.

B. Organizational Chart

P – Expertise in rate design including time varying rates.

P – Expertise in load forecasting, and customer load response to time varying rates.

P – Modeling expertise

P – Expertise in transitioning customer to innovative rate designs

P – Expert testimony experience.

Financial Viability provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

BIDDER NAME: The Brattle Group, Inc.

DATE: 10/21/2024

EVALUATOR NAME: Ethan Grumstrup

EVALUATOR DEPARTMENT: Maine Public Utilities Commission

Certificate of Insurance provided

II. Proposed Services

A. Services to be Provided

P – Very detailed

P – Presents a list of jurisdictions to analyze

P – Presents lines of inquiry to pursue in interviews

P – Presents a list of benefits and costs to quantify.

P – Demonstrates deep understanding of the issues being addressed.

P – Has analytical tools specifically designed to analyze TOU rate design including peak/off-peak ratio.

P – Already has data from jurisdictions implementing TOU

P – Describes deliverables in detail

P – Meets the requirements of the RFP

B. Work Plan

P – Fits the timeline of the RFP

P – Detailed plan to keep work on time.



STATE OF MAINE
MAINE PUBLIC UTILITY COMMISSION

Janet T. Mills
Governor

Philip L. Bartlett, II
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

I, (print name at right) ERIC J. BRYANT accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Public Utilities Commission. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

I have not advised, consulted with or assisted any bidder in the preparation of any proposal submitted in response to this RFP nor have I submitted a letter of support or similar endorsement.

I understand and agree that the evaluation process is to be conducted in an impartial manner without bias or prejudice. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

I agree to hold confidential all information related to the contents of Requests for Proposals presented during the review process until such time as the Department formally releases the award decision notices for public distribution.

Signature 

Date 10/15/24



STATE OF MAINE
MAINE PUBLIC UTILITY COMMISSION

Janet T. Mills
Governor

Philip L. Bartlett, II
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

I, Sally Zeh accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Public Utilities Commission. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

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Sally Zeh
Signature

10/11/2024
Date



STATE OF MAINE
MAINE PUBLIC UTILITY COMMISSION

Janet T. Mills
Governor

Philip L. Bartlett, II
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

I, (print name at right)

Jameson McBride

_____ accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Public Utilities Commission. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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Signature

10/11/24

Date



STATE OF MAINE
MAINE PUBLIC UTILITY COMMISSION

Janet T. Mills
Governor

Philip L. Bartlett, II
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT

RFP #: 202409166

RFP TITLE: Consulting Services to Design Time of Use Rates for Residential Electric Customers

I, (print name at right)

Ethan Grumstrup

accept the offer

to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Public Utilities Commission. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

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I agree to hold confidential all information related to the contents of Requests for Proposals presented during the review process until such time as the Department formally releases the award decision notices for public distribution.

Ethan Grumstrup

Signature

10/17/2024

Date