

**State of Maine
Master Score Sheet**

RFP# 202409176						
Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study						
Bidder Name:		Banyan Infrastructure Corporation	BW Research Partnership, Inc	Customized Energy Solutions, Ltd	CLEAResult Consulting, Inc	
Proposed Cost:		\$142,000.00	\$171,195.00	\$154,400.00	\$160,542.75	
Scoring Sections		Points Available				
Section I: Preliminary Information		Pass/Fail	Pass	Pass	Pass	Pass
Section II: Organization Qualifications and Experience		25	24	23	23	20
Section III: Proposed Services		50	45	45	38	39
Section IV: Cost Proposal		25	25	20.74	22.99	22.11
TOTAL		<u>100</u>	<u>94</u>	<u>88.74</u>	<u>83.99</u>	<u>81.11</u>
Bidder Name:		London Economics International LLC	Sustainable Energy Advantage, LLC			
Proposed Cost:		\$164,200.00	\$172,000.00			
Scoring Sections		Points Available				
Section I: Preliminary Information		Pass/Fail	Pass	Pass		
Section II: Organization Qualifications and Experience		25	23	24		
Section III: Proposed Services		50	40	46		
Section IV: Cost Proposal		25	21.62	20.64		
TOTAL		<u>100</u>	<u>84.62</u>	<u>90.64</u>		

Award Justification Statement
RFP# 202409176 - Clean Energy Research, Demonstration, and Financing
Analysis and Advisory Study

I. Summary

The Governor's Energy Office issued RFP #202409176 Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study on September 27, 2024. A Question & Answer Summary was posted on October 10 and responses were due on October 18. Six entities responded to the RFP.

II. Evaluation Process

Responses were provided to the RFP Coordinator on October 21, and then distributed by the RFP Coordinator to the two additional members of the evaluation team for individual review. The evaluation team members met for Team Evaluation on October 28 & 29. Evaluators were selected for their qualifications and expertise related to Clean Energy Finance, Business, and related programs and program budget & finance.

III. Qualifications & Experience

The conditionally-awarded Bidder received high scores for the Organization Qualification & Experience based on their experience working within the clean energy industry, experience working with relevant stakeholders, and experience working with other State agencies. The conditionally-awarded Bidder also provided examples of relevant project experience building products specific to the services requested by the RFP.

IV. Proposed Services

The conditionally-awarded Bidder received a high score for their Proposed Services by demonstrating an understanding of the study scope and objectives, target audiences and strategies to reach them, and strategies to strengthen and capitalize on current partnerships between State agencies, industry, and capital providers.

V. Cost Proposal

The conditionally-awarded Bidder provided a cost-efficient proposal that received the highest score available.

VI. Conclusion

The GEO received high quality proposals that were responsive to the offering and included a variety of proposed approaches. For this offering, the RFP evaluation team has selected Banyan Infrastructure Corporation as the conditionally awarded Bidder.



STATE OF MAINE
Governor's Energy Office

Janet T. Mills
Governor

Dan Burgess
Director

November 8, 2024

Banyan Infrastructure Corporation
Attention: Colin Harris
303 2nd Street #500N, San Francisco, CA 94107

SUBJECT: Notice of Conditional Contract Award under RFP #202409716,
Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

Dear Colin,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Governor's Energy Office for RFP #202409176 Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

- Banyan Infrastructure Corporation

The bidder listed above received the evaluation team's highest ranking. The Department 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 Department 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 Department is executed. The Department 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 black ink, appearing to read 'Tagwongo Obomsawin', with a horizontal line extending to the right from the end of the signature.

Tagwongo Obomsawin (she/her/hers)
Clean Energy Partnership Program Manager
Governor's Energy Office
(207) 707-2001
tagwongo.obomsawin@maine.gov

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).



STATE OF MAINE
Governor's Energy Office

Janet T. Mills
Governor

Dan Burgess
Director

November 8, 2024

BW Research Partnership, Inc
Attention: Phil Jordan
6120 Paseo Del Norte #E2, Carlsbad, CA 92011

SUBJECT: Notice of Conditional Contract Award under RFP #202409716,
Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

Dear Phil,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Governor's Energy Office for RFP #202409176, Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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STATE OF MAINE
Governor's Energy Office

Janet T. Mills
Governor

Dan Burgess
Director

November 8, 2024

Customized Energy Solutions, Ltd
Attention: Madeline Frierson
1528 Walnut Street 22nd Floor, Philadelphia, PA 19102

SUBJECT: Notice of Conditional Contract Award under RFP #202409716,
Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

Dear Madeline,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Governor's Energy Office for RFP #202409176, Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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

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Tagwongo Obomsawin (she/her/hers)
Clean Energy Partnership Program Manager
Governor's Energy Office
(207) 707-2001
tagwongo.obomsawin@maine.gov

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STATE OF MAINE
Governor's Energy Office

Janet T. Mills
Governor

Dan Burgess
Director

November 8, 2024

CLEAResult Consulting, Inc
Attention: Meghan Morgan
6504 Bridge Point Pkwy Suite 425, Austin, TX, 78730

SUBJECT: Notice of Conditional Contract Award under RFP #202409716,
Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

Dear Meghan,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Governor's Energy Office for RFP #202409176, Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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STATE OF MAINE
Governor's Energy Office

Janet T. Mills
Governor

Dan Burgess
Director

November 8, 2024

London Economics International LLC
Attention: Marie Fagan
717 Atlantic Avenue Suite 1A, Boston, MA, 02111

SUBJECT: Notice of Conditional Contract Award under RFP #202409716,
Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

Dear Marie,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Governor's Energy Office for RFP #202409176, Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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STATE OF MAINE
Governor's Energy Office

Janet T. Mills
Governor

Dan Burgess
Director

November 8, 2024

Sustainable Energy Advantage, LLC
Jason Gifford
161 Worcester Road Suite 503, Framingham, MA, 01701

SUBJECT: Notice of Conditional Contract Award under RFP #202409716,
Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

Dear Jason,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Governor's Energy Office for RFP #202409176, Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Banyan Infrastructure Corporation

DATE: 10/28/2024

SUMMARY PAGE

Department Name: Governor’s Energy Office

Name of RFP Coordinator: Tagwongo Obomsawin

Names of Evaluators: Tagwongo Obomsawin, Wendy Crosier, Lindsay Gilton

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	24
Section III. Proposed Services	50	45
Section IV. Cost Proposal	25	25
<u>Total Points</u>	<u>100</u>	<u>94</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Banyan Infrastructure Corporation

DATE: 10/28/2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- i. Proposal Cover Page & Responsible Bidder Certification

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Banyan Infrastructure Corporation

DATE: 10/28/2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	24

Evaluation Team Comments:

- i. Overview of the Organization
 - Founded in 2018, is a project finance software and advisory services company, headquartered in San Francisco with a team of more than 50 people including advisory, engineering, product design, customer success, sales, marketing and operations.
 - Project team has experience with McKinsey, Generate Capital, AES, Lazard, NYSERDA/NY Green Bank; impressive and relevant.
 - Project team has significant technical expertise, senior-level staff will be meaningfully contributing to the project.
 - Project examples include with public sector, recent energy programs, however many of the past examples pre-date the firm.
 - Proprietary software platform
- ii. Subcontractors
 - Summit Advisory LLC
- iii. Organizational Chart
 - Provided
- iv. Litigation
 - Statement provided
- v. Licensure/Certification
 - Statement provided
- vi. Certificate of Insurance
 - Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Banyan Infrastructure Corporation

DATE: 10/28/2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	50	45

Evaluation Team Comments:

I. Services to be Provided

- Bidder expresses concern about the timeline for Task 1, more detail would be helpful regarding stakeholder engagement strategy (Task 3).
- Propose to research, recommend and report on 2-4 states' clean energy financing programs
- Positive - discuss potential strategies for low-income and disadvantaged communities
- Highly relevant experience of project team including in Northeast; not familiar with Maine.
- Strategy report development includes updating of benchmarking model
- Discuss use of network and services to supplement informational interviews, e.g., Guidepoint, AlphaSights. "Connected ecosystem" includes developers, capital market players, public funds, insurance agencies, consultancies, and legal firms.
- Propose to deliver a summary report detailing process and technical assistance efforts
- Positive – inclusion of FTE score, diverse team
- Positive – presents industry insights relevant to Maine for consideration

II. Implementation - Work Plan

- Provided in text, but no gantt chart

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Banyan Infrastructure Corporation

DATE: 10/28/2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$142,000.00	/	\$142,000.00	x	25 points	=	25

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: BW Research Partnership, Inc

DATE: 10/28/2024

SUMMARY PAGE

Department Name: Governor’s Energy Office

Name of RFP Coordinator: Tagwongo Obomsawin

Names of Evaluators: Tagwongo Obomsawin, Wendy Crosier, Lindsay Gilton

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	23
Section III. Proposed Services	50	45
Section IV. Cost Proposal	25	20.74
<u>Total Points</u>	<u>100</u>	<u>88.74</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: BW Research Partnership, Inc

DATE: 10/28/2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- i. Proposal Cover Page & Responsible Bidder Certification

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: BW Research Partnership, Inc

DATE: 10/28/2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	23

Evaluation Team Comments:

- i. Overview of the Organization
 - Founded in 2006, BW Research has offices in California, Massachusetts, and São Paulo, Brazil, with staff capacity in San Fransisco and Washington, D.C. Experience in policy and economic development, as well as it compiling and analyzing economic, fiscal, and demographic data, conducting stakeholder engagement, modeling fiscal impacts.
 - Project examples aligned with aspects of the desired scope of work, include supply chain, workforce, and climate tech sector analyses.
 - Worked with GEO in the past, knowledge of past performance with State gov. considered.
- ii. Subcontractors
 - None
- iii. Organizational Chart
 - Provided
- iv. Litigation
 - Statement provided
- v. Licensure/Certification
 - Provided
- vi. Certificate of Insurance
 - Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: BW Research Partnership, Inc

DATE: 10/28/2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	50	45

Evaluation Team Comments:

I. Services to be Provided

- Experience in Maine and working with Maine GEO, demonstrates understanding of business landscape, business/workforce implications of clean energy landscape. Demonstrates understanding/prior knowledge of relevant stakeholders.
- Positive/interesting – regional financing and incentive program inventory.
- Propose to conduct executive interviews with 15 to 20 key stakeholders.
- Propose to evaluate 2-4 other states for comparison (Task 2).
- Benchmarking criteria are well defined, provide several examples.
- Application of Human Centered Design is interesting, use of small groups is thoughtful.
- Detailed plan for Task 4 is included. Demonstrates alignment with some but not all aspects of the desired scope.

II. Implementation - Work Plan

- Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: BW Research Partnership, Inc

DATE: 10/28/2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$142,000.00	/	\$171,195.00	x	25 points	=	20.74

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Customized Energy Solutions, Ltd

DATE: 10/29/2024

SUMMARY PAGE

Department Name: Governor's Energy Office

Name of RFP Coordinator: Tagwongo Obomsawin

Names of Evaluators: Tagwongo Obomsawin, Wendy Crosier, Lindsay Gilton

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	23
Section III. Proposed Services	50	38
Section IV. Cost Proposal	25	22.99
<u>Total Points</u>	<u>100</u>	<u>83.99</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Customized Energy Solutions, Ltd

DATE: 10/29/2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- i. Proposal Cover Page & Responsible Bidder Certification

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Customized Energy Solutions, Ltd

DATE: 10/29/2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	23

Evaluation Team Comments:

- i. Overview of the Organization
 - Customized Energy Solutions has offices in Philadelphia, New York, Indiana, Texas, and California in addition to home offices across the country. Company is 25 years old, with a current staff of ~ 400 employees globally across the USA, Canada, India, Japan, and Vietnam.
 - CES has five major business lines: Market Intelligence, Retail Services, Future Grid, and Emerging Technologies. Emerging Technologies business unit would support this project.
 - Projects in ISO-NE, Canada, PGM, NY-ISO (Independent System Operators), demonstrates experience with NE electricity markets. Have also worked with utilities.
 - Project examples included, demonstrates relevant experience.
 - Proprietary market analysis tool.
- ii. Subcontractors
 - None
- iii. Organizational Chart
 - Provided
- iv. Litigation
 - Provided
- v. Licensure/Certification
 - Provided
- vi. Certificate of Insurance
 - Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Customized Energy Solutions, Ltd

DATE: 10/29/2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	50	38

Evaluation Team Comments:

I. Services to be Provided

- Did not identify number of interviews conducted as part of Task 1. Propose to identify barriers to accessing funds.
- Propose to evaluate 2-4 other states to inform the development of strategy (Task 2). Propose to conduct at least five interviews with out-of-state funds and financial institutions. Overall, Task 2 demonstrates understanding of RFP objectives.
- Propose to identify three potential projects that can serve as case studies for the proposed policy (Task 4). CES will use their modeling software to generate revenue forecasts for the projects, considering the policy. Demonstrates alignment with some (but not all) of the desired scope/objectives for Task 4.
- Task 3 (Public Comment) appears slightly underdeveloped.

II. Implementation - Work Plan

- Detailed workplan provided
- Identifies specific staff per task in the workplan

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Customized Energy Solutions, Ltd

DATE: 10/29/2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$142,000.00	/	\$154,400.00	x	25 points	=	22.99

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: CLEAResult Consulting, Inc

DATE: 10/29/2024

SUMMARY PAGE

Department Name: Governor’s Energy Office

Name of RFP Coordinator: Tagwongo Obomsawin

Names of Evaluators: Tagwongo Obomsawin, Wendy Crosier, Lindsay Gilton

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	20
Section III. Proposed Services	50	39
Section IV. Cost Proposal	25	22.11
<u>Total Points</u>	<u>100</u>	<u>81.11</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: CLEAResult Consulting, Inc

DATE: 10/29/2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- i. Proposal Cover Page & Responsible Bidder Certification

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: CLEAResult Consulting, Inc

DATE: 10/29/2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	20

Evaluation Team Comments:

- i. Overview of the Organization
 - CLEAResult has nearly 20 years of experience designing, studying, and implementing energy programs for communities, public entities, utilities, businesses, and residential energy customers
 - Current portfolio of more than 190 utility partners and public-sector clients and 1,650 energy programs.
 - Experience with Efficiency Maine Trust, Colorado energy office, DOE EERE
 - Project examples provided, demonstrates relevant experience
- ii. Subcontractors
 - None
- iii. Organizational Chart
 - Provided
 - Team demonstrates experience in energy, policy analysis, market transformation, stakeholder engagement
 - Question – finance experience; somewhat inferred from program experience
- iv. Litigation
 - Statement provided but without additional information does not adequately address the RFP requirements
- v. Licensure/Certification
 - Provided
- vi. Certificate of Insurance
 - Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: CLEAResult Consulting, Inc

DATE: 10/29/2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	50	39

Evaluation Team Comments:

I. Services to be Provided

- Strategy for Task 1 somewhat underdeveloped and/or little detail provided.
- Strategy report (Task 2) includes objective to support energy justice (positive). Overall, strategy for Task 2 appears to be well developed.
- Propose a continuous stakeholder engagement strategy to support the project but do not include target number of stakeholder interviews. In general, strategy for Task 3 is somewhat underdeveloped and/or little detail provided.
- Combination of proprietary and publicly available models, incl. TEA
- Propose to establish a set of metrics for program evaluation, list examples (positive)
- Helpdesk and living FAQ are interesting solutions

II. Implementation - Work Plan

- Detailed workplan provided, includes specific staff resources by task

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: CLEAResult Consulting, Inc

DATE: 10/29/2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$142,000.00	/	\$160,542.75	x	25 points	=	22.11

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: London Economics International LLC

DATE: 10/28/2024

SUMMARY PAGE

Department Name: Governor's Energy Office

Name of RFP Coordinator: Tagwongo Obomsawin

Names of Evaluators: Tagwongo Obomsawin, Wendy Crosier, Lindsay Gilton

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	23
Section III. Proposed Services	50	40
Section IV. Cost Proposal	25	21.62
<u>Total Points</u>	<u>100</u>	<u>84.62</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: London Economics International LLC

DATE: 10/28/2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- i. Proposal Cover Page & Responsible Bidder Certification

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: London Economics International LLC

DATE: 10/28/2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	23

Evaluation Team Comments:

- i. Overview of the Organization
 - Global economic, financial, and strategic advisory professional services firm specializing in energy, water, and infrastructure. Office located in Boston MA. Extensive experience with utilities, rate analysis/ratemaking, electricity markets.
 - Project examples provided, demonstrate alignment with some (but not all) of the desired scope/experience.
 - Sizeable internal network.
 - Extensive experience in Maine and includes work with the Maine PUC. Niche experience and regional design focus, proprietary electricity market modeling software.
 - Significant experience with feasibility studies. Demonstrate high level of technical energy markets expertise.
- ii. Subcontractors
 - None
- iii. Organizational Chart
 - Provided
 - Designated resource to Maine based in San Francisco
- iv. Litigation
 - Statement provided
- v. Licensure/Certification
 - None provided
- vi. Certificate of Insurance
 - Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: London Economics International LLC

DATE: 10/28/2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	50	40

Evaluation Team Comments:

- I. Services to be Provided
 - Regarding technical assistance for strategy implementation, they highlight past projects rather than illustrating the proposed approach.
 - Propose to select 2-4 states that will inform the development of a strategy to achieve Maines clean energy goals.
 - Propose to offer 3 public engagement opportunities
 - Propose to interview roughly 6 state agencies/stakeholders.
 - Proposal somewhat underdeveloped, doesn't appear to be tailored to Maine's unique landscape and goals/requirements.
 - Positive – project summary memo for technical assistance provided.

- II. Implementation - Work Plan
 - Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: London Economics International LLC

DATE: 10/28/2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$142,000.00	/	\$164,200.00	x	25 points	=	21.62

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Sustainable Energy Advantage, LLC

DATE: 10/28/2024

SUMMARY PAGE

Department Name: Governor’s Energy Office

Name of RFP Coordinator: Tagwongo Obomsawin

Names of Evaluators: Tagwongo Obomsawin, Wendy Crosier, Lindsay Gilton

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	24
Section III. Proposed Services	50	46
Section IV. Cost Proposal	25	20.64
<u>Total Points</u>	<u>100</u>	<u>90.64</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Sustainable Energy Advantage, LLC

DATE: 10/28/2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

- i. Proposal Cover Page & Responsible Bidder Certification

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Sustainable Energy Advantage, LLC

DATE: 10/28/2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	25	24

Evaluation Team Comments:

- i. Overview of the Organization
 - Consulting and advisory firm specializing in clean energy market, policy, strategic and financial analysis. 25 years of experience in analysis of renewable energy policy and markets, supporting nearly 200 clients, including 40 governmental entities.
 - Utilize renewable energy regulatory, policy, and legislative tracking and analysis software.
 - Project examples –public sector, government entities. Demonstrates experience in technical and policy areas of interest.
 - Worked with GEO in the past, knowledge of past performance with State gov. considered.
- ii. Subcontractors
 - Birch Tree Capital - help the SEA Team collect and interpret actionable feedback from renewable energy finance market participants.
- iii. Organizational Chart
 - Provided
- iv. Litigation
 - Statement provided
- v. Licensure/Certification
 - None provided
- vi. Certificate of Insurance
 - None provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Sustainable Energy Advantage, LLC

DATE: 10/28/2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	50	46

Evaluation Team Comments:

- I. Services to be Provided
 - "Prepared for Maine Public Utilities Commission" - wrong Department
 - Includes detailed project workplan by task, including specific personnel per task. Thoughtful staff/resources allocation.
 - Key considerations provided per task, demonstrates understanding of desired scope and outcomes.
 - Demonstrates understanding of stakeholder landscape and knowledge of engagement strategies, e.g., 5-step approach to public comment process. Propose to include 6-8 public sector interviews, as well as 6-8 private sector interviews.
 - Experience working in New England markets, prior research in Maine can be built upon.
 - Would have appreciated more detail regarding insights expected to be produced by the Eyes & Ears software

- II. Implementation - Work Plan
 - Detailed workplan provided.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Sustainable Energy Advantage, LLC

DATE: 10/28/2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$142,000.00	/	\$172,000.00	x	25 points	=	20.64

Evaluation Team Comments:

- Included proposed budget for Task 4 in evaluation

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Banyan Infrastructure Corporation

DATE: 10/25/2024

EVALUATOR NAME: Tagwongo Obomsawin

EVALUATOR DEPARTMENT: Governor's Energy Office

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:

Section I Preliminary Information (File #1)

- i. Proposal Cover Page & Responsible Bidder Certification

Section II Organization Qualifications and Experience (File #2)

- i. Overview of the Organization
 - a. Banyan with Summit Advisory LLC
 - b. Project team has experience with McKinsey, Generate Capital, AES, NYSERDA/NY Green Bank
 - c. Project examples provided but client names/contact info not provided. Examples demonstrate relevant expertise/experience.
 - d. Banyan, founded in 2018, is a project finance software and advisory services company, headquartered in San Francisco with a team of more than 50 people including advisory, engineering, product design, customer success, sales, marketing and operations.
- ii. Subcontractors
 - Summit Advisory LLC
- iii. Organizational Chart
 - Provided
- iv. Litigation
 - Statement provided
- v. Licensure/Certification
 - Statement provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Banyan Infrastructure Corporation

DATE: 10/25/2024

EVALUATOR NAME: Tagwongo Obomsawin

EVALUATOR DEPARTMENT: Governor's Energy Office

- vi. Certificate of Insurance
 - Provided

Section III Proposed Services (File #3)

- I. Services to be Provided
 - a. Demonstrates good understanding of objectives and desired approach
 - b. Concern raised over timeline
 - c. Uses proprietary software for modeling including specific regulations (DBRA, BABA)
 - d. Highly relevant experience of project team including in Northeast; not familiar with Maine; could be both positive and negative
 - e. Question about stakeholder engagement experience/approach
- II. Implementation - Work Plan
 - a. High-level workplan provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: BW Research Partnership, Inc

DATE: 10/25/24

EVALUATOR NAME: Tagwongo Obomsawin

EVALUATOR DEPARTMENT: Governor's Energy Office

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:

Section I Preliminary Information (File #1)

- i. Proposal Cover Page & Responsible Bidder Certification

Section II Organization Qualifications and Experience (File #2)

- i. Overview of the Organization
 - Founded in 2006, BW Research has offices in California, Massachusetts, and São Paulo, Brazil, with staff capacity in San Fransisco and Washington, D.C. BW Research has performed research for dozens of public and private entities, including local, state, and federal clean energy agencies, economic development agencies, workforce development boards, and educational institutions.
 - Specialized knowledge in policy implementation and economic development, as well as its proven track record of expertise in compiling and analyzing economic, fiscal, and demographic data; conducting rigorous stakeholder and community engagement; modeling fiscal impacts; and developing insights
 - Project examples provided, include supply chain, workforce, and climate tech sector analyses
- ii. Subcontractors
 - None
- iii. Organizational Chart
 - Provided
- iv. Litigation
 - Statement provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: BW Research Partnership, Inc

DATE: 10/25/24

EVALUATOR NAME: Tagwongo Obomsawin

EVALUATOR DEPARTMENT: Governor's Energy Office

- v. Licensure/Certification
 - Provided

- vi. Certificate of Insurance
 - Provided

Section III Proposed Services (File #3)

- I. Services to be Provided
 - Experience in Maine/with Maine GEO
 - Demonstrates understanding of project objectives and scope
 - Application of HCD is compelling. BW has experience using HCD with Maine stakeholders, deploying "importance/difficulty matrix". All of these activities include as part of Task 4, which is interesting. Would like to see them integrated into Task 2. As it is proposed, Task 4 differs a bit from the intended scope.
 - Interesting - rough and ready prototyping
 - Question about program implementation strategy/approach
- II. Implementation - Work Plan
 - Detailed workplan provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Customized Energy Solutions, Ltd

DATE: 10/25/24

EVALUATOR NAME: Tagwongo Obomsawin

EVALUATOR DEPARTMENT: Governor's Energy Office

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:

Section I Preliminary Information (File #1)

- i. Proposal Cover Page & Responsible Bidder Certification

Section II Organization Qualifications and Experience (File #2)

- i. Overview of the Organization
 - Customized Energy Solutions has offices in Philadelphia, New York, Indiana, Texas, and California in addition to home offices across the country. CES has grown consistently over the past 25 years, with a current staff of ~ 400 employees globally across the USA, Canada, India, Japan, and Vietnam.
 - CES has five major business lines (all related to energy): Market Intelligence, Retail Services, Future Grid, and Emerging Technologies.
 - Project examples included, demonstrates relevant experience.
- ii. Subcontractors
 - None
- iii. Organizational Chart
 - Provided
- iv. Litigation
 - Provided
- v. Licensure/Certification
 - Provided
- vi. Certificate of Insurance

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Customized Energy Solutions, Ltd

DATE: 10/25/24

EVALUATOR NAME: Tagwongo Obomsawin

EVALUATOR DEPARTMENT: Governor's Energy Office

- Provided

Section III Proposed Services (File #3)

- I. Services to be Provided
 - Demonstrates understanding of desired scope/outcomes at face value, little effort made to embed relevant insights/strategies that would help evaluate their approach further.

- II. Implementation - Work Plan
 - Detailed workplan provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: CLEARResult Consulting, Inc

DATE: 10/25/24

EVALUATOR NAME: Tagwongo Obomsawin

EVALUATOR DEPARTMENT: Governor’s Energy Office

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:

Section I Preliminary Information (File #1)

- i. Proposal Cover Page & Responsible Bidder Certification

Section II Organization Qualifications and Experience (File #2)

- i. Overview of the Organization
 - CLEARResult has nearly 20 years of experience designing, studying, and implementing energy programs for communities, public entities, utilities, businesses, and residential energy customers
 - Current portfolio of more than 190 utility partners and public-sector clients and 1,650 energy programs.
 - Project examples provided
 - Positive – experience and familiarity with EMT programs.
- ii. Subcontractors
 - None
- iii. Organizational Chart
 - Provided
 - Team demonstrates experience in energy, policy analysis, market transformation, stakeholder engagement
 - Question – finance experience
- iv. Litigation
 - Did not adequately respond to litigation
- v. Licensure/Certification

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: CLEAResult Consulting, Inc

DATE: 10/25/24

EVALUATOR NAME: Tagwongo Obomsawin

EVALUATOR DEPARTMENT: Governor's Energy Office

- Provided

vi. Certificate of Insurance

- Provided

Section III Proposed Services (File #3)

I. Services to be Provided

- Demonstrates expertise of team but would be nice if the proposal included more insights about Maine. How well does the experience translate?
- Question about stakeholder engagement component – will they be able to efficiently and meaningfully engage entities in Maine to produce the right insights?
- Combination of proprietary and publicly available models, incl. TEA
- Interesting – Helpdesk and living FAQ

II. Implementation - Work Plan

- Detailed workplan provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: London Economics International LLC

DATE: 10/25/24

EVALUATOR NAME: Tagwongo Obomsawin

EVALUATOR DEPARTMENT: Governor's Energy Office

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:

Section I Preliminary Information (File #1)

- i. Proposal Cover Page & Responsible Bidder Certification

Section II Organization Qualifications and Experience (File #2)

- i. Overview of the Organization
 - Global economic, financial, and strategic advisory professional services firm specializing in energy, water, and infrastructure.
 - Interesting - proprietary quantitative models (electricity market simulation,
 - Extensive experience with utilities, rate analysis/ratemaking, electricity markets
 - Project examples provided, multiple projects with Maine PUC
- ii. Subcontractors
 - None listed
- iii. Organizational Chart
 - Provided
- iv. Litigation
 - Statement provided
- v. Licensure/Certification
 - Nothing provided
- vi. Certificate of Insurance
 - Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: London Economics International LLC

DATE: 10/25/24

EVALUATOR NAME: Tagwongo Obomsawin

EVALUATOR DEPARTMENT: Governor's Energy Office

Section III Proposed Services (File #3)

- I. Services to be Provided
 - Detailed workplan presented by task
 - Demonstrates understanding of desired scope of work at face value, but it would have been nice to see other project examples that demonstrated policy design and stakeholder engagement experience.
 - Question – approach to policy and program design
 - Question – balance of market design and technical analysis vs stakeholder engagement and policy design

- II. Implementation - Work Plan
 - Detailed workplan provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Sustainable Energy Advantage, LLC

DATE: 10/25/24

EVALUATOR NAME: Tagwongo Obomsawin

EVALUATOR DEPARTMENT: Governor's Energy Office

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:

Section I Preliminary Information (File #1)

- i. Proposal Cover Page & Responsible Bidder Certification

Section II Organization Qualifications and Experience (File #2)

- i. Overview of the Organization
 - Consulting and advisory firm specializing in clean energy market, policy, strategic and financial analysis. 25 years of experience in analysis of renewable energy policy and markets, supporting nearly 200 clients, including 40 governmental entities.
 - Interesting – New England Renewable Energy Market Outlook (NE-REMO)SM and Eyes and Ears (E&E) renewable energy regulatory, policy and legislative tracking and analysis SM subscription services.
 - SEA is in constant contact with renewable energy developers, asset owners, and investors – discussing the barriers to clean energy development and financing, and what it takes to attract and retain investment in the sector.
 - Relevant project experience provided.
 - Compelling demonstration of experience in technical and policy areas of interest.
- ii. Subcontractors
 - Birch Tree Capital
- iii. Organizational Chart
 - Provided
 - Experienced team with demonstrated expertise
- iv. Litigation

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Sustainable Energy Advantage, LLC

DATE: 10/25/24

EVALUATOR NAME: Tagwongo Obomsawin

EVALUATOR DEPARTMENT: Governor's Energy Office

- Statement provided

- v. Licensure/Certification
 - None provided

- vi. Certificate of Insurance
 - Provided

Section III Proposed Services (File #3)

- I. Services to be Provided
 - Demonstrates strong understanding of scope and desired outcomes
 - Demonstrates strong understanding of stakeholder landscape and knowledge of engagement strategies
 - Interesting – proposed approach to public comment process
 - Positive – prior work with Maine GEO, analysis of renewable energy policy/markets in Maine and Northeast

- II. Implementation - Work Plan
 - Detailed workplan provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Banyan Infrastructure Corporation

DATE: 10/23/2024

EVALUATOR NAME: Lindsay Gilton

EVALUATOR DEPARTMENT: Governor's Energy Office

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:

Section I Preliminary Information (File #1)

- i. Proposal Cover Page & Responsible Bidder Certification
 - a. Bidder completed the Proposal Cover Page and includes the Bidder's address and other details listed. The Proposal Cover Page is dated and signed by the Chief Executive Officer.
 - b. Bidder completed the Responsible Bidder Certification. The Responsible Bidder Certification is dated and signed by the Chief Executive Officer.

Section II Organization Qualifications and Experience (File #2)

- i. Overview of the Organization
 - a. Bidder completed the Qualifications and Experience Form. Bidder included three examples of projects which demonstrate their experience and expertise in performing these services as well as highlighting the Bidder's stated qualifications and skills.
 - i. Banyan is a project finance software and advisory services company, headquartered in San Francisco with a team of more than 50 people including advisory, engineering, product design, customer success, sales, marketing and operations. Summit is an independent consultancy which provides advisory services to clients engaging on energy, infrastructure, and finance topics.
 - ii. The Bidder's three project examples include:
 - 1. Drafting a Direct Lending Investment Policy to help launch a Direct Lending business following a large non-profit, state entity's capitalization as a coalition member of the Coalition for Green Capital, under the EPAs Greenhouse Gas

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Governor's Energy Office

- Reduction Funds (GGRF), National Clean Investment Fund ("NCIF") award.
2. Providing a nascent Clean Energy Fund with advisory services to prepare its financial management, impact and stakeholder reporting practices in support of its application for EPA GGRF.
 3. Accelerating the commercialization efforts by certain government entities through the engagement of a government client.
- ii. Subcontractors
- a. Summit Advisory, LLC will be subcontracted by Banyan. The name, address, phone number, contact person, and a brief description of the subcontractors' organizational capacity and qualifications is included.
- iii. Organizational Chart
- a. Bidders provided an organizational chart. The organizational chart includes the project being proposed and each position is identified by position title and corresponding to the personnel job descriptions.
- iv. Litigation
- a. Neither Banyan or Summit is party to any litigation or administrative proceedings.
- v. Licensure/Certification
- a. Banyan and Summit's teams are offering its strategic advisory expertise based upon the qualifications provided throughout this RFP response. Neither Banyan nor Summit will provide legal, tax, accounting, audit, or other expertise requiring specific licensure or certification.
- vi. Certificate of Insurance
- a. Bidders provided a certificate of insurance on a standard ACORD form. Banyan carries the following insurance policies: General Liability; Umbrella Liability; Cyber/Tech E&O; D&O/Fiduciary; Crime

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 10/23/2024

EVALUATOR NAME: Lindsay Gilton

EVALUATOR DEPARTMENT: Governor's Energy Office

Section III Proposed Services (File #3)

I. Services to be Provided

a. Discuss the Scope of Services referenced above in Part II of the RFP and what the Bidder will offer. Give particular attention to describing the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

i. Clean Energy Economic Development Baseline Report

1. Banyan-Summit anticipates that this baseline report will inventory and summarize:

- a. Energy demand and supply dynamics specific to Maine including those around consumption and production, baseload, transmission, current clean energy sources (e.g., hydropower) and opportunities for demand reduction, distributed energy resources (front-of-the-meter) and energy efficiency, as they relate to Maine GEOs clean energy goals
- b. Existing clean energy policy and available capital sources (including federal, state, utility, tax, rebate, grant and commercial), including their expected deployment and timing;
- c. Market barriers and/or financing gaps which the above capital sources are not readily addressing, due to risk premiums or other dynamics specific to Maine;
- d. Comparison to other State approaches to promote clean energy production and consumption, including a quantitative benchmark to comparable states (including notional state funding currently available/in-play and per capita, market segments addressed (such as commercial/industrial, multi-family affordable housing) and program types including rebates, grants and public-private partnerships).

ii. Maine Clean Energy Research, Demonstration, and Financing Strategy Report

1. Banyan-Summit plan for this strategy report to:

- a. Analyze public and private financing mechanisms (including risk premiums, project finance structuring approaches and potential public-private partnerships);

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

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EVALUATOR DEPARTMENT: Governor's Energy Office

- b. Make recommendations for coordination between GEO, DECD, EMT, MTI, FAME, MVF, MITC, the private sector and other existing funds and financial institutions (including additional public and private sector capital). These may include:
 - i. Additional strategic areas of focus
 - ii. Policy/program recommendations.
 - iii. Geographic and/or specific clean energy asset type opportunities
 - iv. *Banyan-Summit anticipates that each recommendation would be based upon and narrowed by "case studies or comps" from other states identified in research
 - c. Deliver a feasibility study of program design options to meet key objectives related to financing, research and development and business development.
 - d. Conduct a public outreach and engagement process in coordination with GEO including targeted outreach to the business community all in support of the above.
- II. Implementation - Work Plan
- a. Bidder does not include a timeline/gantt chart.
 - i. Kick-Off | Week 1
 - 1. Kick-off meeting immediately following execution of an engagement letter or similar contract for advisory services; introduce relevant teammates, review a project plan (Gantt Chart or similar) and ensure alignment of the overall timeline and deliverables.
 - ii. Baseline Report | 11/15/2024 - 12/13/2024
 - 1. Begin data gathering and desktop research to satisfy the 12/13/2024 deadline for the Baseline Report; perform desktop research combined with informational interviews with key personnel from state agencies, and a select list of in-state/ out-of-state funds and financial institutions (as agreed upon with GEO leadership), and industry (e.g., developers, ESCOs and others);
 - iii. Strategy Report | 12/14/2024 - 02/15/2024
 - 1. Research, recommend and report on 2-4 states' clean energy financing programs, as agreed upon with Maine GEO, including where those states' clean energy and

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EVALUATOR NAME: Lindsay Gilton

EVALUATOR DEPARTMENT: Governor's Energy Office

economic development goals align with those of Maine; conduct informational interviews with representatives and/or key personnel identified at each to inform the development of policy and programmatic recommendations to achieve Maine's goals; update its benchmarking model to reflect a "post recommendation" state, should the State adopt the team's recommendations, including expected clean energy and economic development impact.

iv. Public Comment Process | 11/15/2024 - 3/30/2025

1. Conduct a Public Comment Process ("PCP"), including to announce the PCP at the start of the engagement and update it accordingly with public-facing materials to seek such comments; prepare and present draft Baseline and Strategy Reports ("Reports") to the public, compile feedback (expected to include summarizing comments received), deliver summarized feedback to Maine GEO with recommendations to refine Report(s), complete such refinements and report to the public how the Reports were refined

v. Technical Assistance | 6/30/2025 - 9/30/2025

1. Maine GEO retains the option to enter an additional contract renewal period (through 9/2025) with Banyan-Summit to advance the development of real investments identified by the report(s), including project candidates and to respond to inquiries.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: BW Research Partnership, Inc.

DATE: 10/23/2024

EVALUATOR NAME: Lindsay Gilton

EVALUATOR DEPARTMENT: Governor's Energy Office

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:

Section I Preliminary Information (File #1)

- i. Proposal Cover Page & Responsible Bidder Certification
 - a. Bidder completed the Proposal Cover Page and includes Bidder address and other details listed. The Proposal Cover Page is dated and signed by the President.
 - b. Bidder completed the Responsible Bidder Certification. The Responsible Bidder Certification is dated and signed by the President.

Section II Organization Qualifications and Experience (File #2)

- i. Overview of the Organization
 - a. Bidder completed the Qualifications and Experience Form. Bidder included three examples of projects which demonstrate their experience and expertise in performing these services as well as highlighting the Bidder's stated qualifications and skills.
 - i. BW Research Partnership, Inc. (BW Research) delivers research and strategic consulting. Their focus lies in the climate and clean-energy sectors, and they create policy implementation, workforce, supply chain, community benefit, and market research studies within the climate and clean energy sectors, integrating needs for equitable access to opportunities and investments throughout. They have performed research for public and private entities, including local, state, and federal clean energy agencies, economic development agencies, workforce development boards, and educational institutions.
 - ii. The Bidder's three project examples include:

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: BW Research Partnership, Inc.

DATE: 10/23/2024

EVALUATOR NAME: Lindsay Gilton

EVALUATOR DEPARTMENT: Governor's Energy Office

1. Commissioned by the Massachusetts Clean Energy Center to expand upon the 2023 MA Clean Energy Industry Report.
 2. Worked with the New Jersey Economic Development Authority (NJEDA) and the Governor's Office of Climate Action and the Green Economy (GOCAGE) to conduct a comprehensive workforce assessment on green economy and climate-related jobs in the state.
 3. Collaborated with the Xodus Group to author the Capital Region Offshore Wind Industry and Supply Chain Analysis Report for the Center for Economic Growth (CEG).
- ii. Subcontractors
- a. Bidder will not utilize subcontractors.
- iii. Organizational Chart
- a. Bidders provided an organizational chart. The organizational chart includes the project being proposed and each position is identified by position title and corresponding to the personnel job descriptions.
- iv. Litigation
- a. BW Research has not, and is not currently, been subject to any past or current litigation.
- v. Licensure/Certification
- a. Philip Jordan (project lead) is a LUMA-certified facilitator of human centered design.
- vi. Certificate of Insurance
- a. Bidder provided a certificate of insurance on a standard ACORD form.

Section III Proposed Services (File #3)

- I. Services to be Provided
 - a. Discuss the Scope of Services referenced above in Part II of the RFP and what the Bidder will offer. Give particular attention to describing the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: BW Research Partnership, Inc.

DATE: 10/23/2024

EVALUATOR NAME: Lindsay Gilton

EVALUATOR DEPARTMENT: Governor's Energy Office

- i. Maine Clean Energy Research, Demonstration, and Financing Baseline Report
 1. Conduct kickoff meeting and formalize research plan
 - a. The kickoff meeting will ensure alignment on the project scope, overall task prioritization, and the project timeline and deliverables.
 2. Review foundational literature and current clean energy landscape
 - a. This review process will serve as the foundation for developing quantitative benchmarks and metrics to measure the effectiveness of Maine's current incentive offerings and value propositions relative to other states.
 3. Create regional financing and incentive program inventory
 - a. The financing program inventory will serve as a critical resource that will highlight the strengths and weaknesses of Maine's existing financing mechanism landscape for clean energy projects and will help shed light on any geographic or clean energy technology-specific financing gaps.
 4. Conduct executive interviews of key stakeholders
 - a. Interviews will explore existing financing program opportunities and outcomes in Maine; key deficiencies in Maine's current capital markets; funding support needed for emerging clean energy technologies; drivers for investment and interest in Maine-based project development efforts; and potential business resources, partnerships, and collaboration opportunities, among other topics.
 5. Produce baseline report and presentation
- ii. Maine Clean Energy Research, Demonstration, and Financing Strategy Report
 1. Incorporate feedback and identify benchmarking criteria
 2. Develop case studies of comparable programs
 - a. The case studies will detail comparable programs and best practices that may be easily replicable or transferable to Maine, and present new suggestions or options for Maine's efforts in developing new financing mechanisms and programs.

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

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3. Conduct gap analysis and develop potential program recommendations
 - a. A gap analysis will be conducted to identify areas of funding need for underserved and emerging clean energy technologies within the state. It will identify potential financing mechanisms and incentive programs, in addition to recommendations and implementation strategies for programs with the highest impact and efficacy levels, to be used in the final strategy report.
 4. Produce final strategy report and presentation
 - iii. Public comment process
 1. Initial public comment convening
 2. Baseline report public comment convening
 3. Final strategy report public comment convening
 - iv. Technical assistance for strategy implementation
 1. BW Research proposes conducting a comprehensive human-centered design strategy to develop concrete programs based on the recommendations developed in the public comment process.
- II. Implementation - Work Plan
- a. Provide a realistic work plan for the implementation of the program through the first contract period. Display the work plan in a timeline chart. Concisely describe each program development and implementation task, the month it will be carried out and the person or position responsible for each task. If applicable, make note of all tasks to be delegated to subcontractors.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Customized Energy Solutions (CES), Ltd.

DATE: 10/24/2024

EVALUATOR NAME: Lindsay Gilton

EVALUATOR DEPARTMENT: Governor's Energy Office

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:

Section I Preliminary Information (File #1)

- i. Proposal Cover Page & Responsible Bidder Certification
 - a. Bidder completed the Proposal Cover Page. The Proposal Cover Page is dated and signed by the Lead Consultant.
 - b. Bidder completed the Responsible Bidder Certification. The Responsible Bidder Certification is dated and signed by the Lead Consultant.

Section II Organization Qualifications and Experience (File #2)

- i. Overview of the Organization
 - a. Bidders completed the Qualifications and Experience Form. Bidder included three examples of projects which demonstrate their experience and expertise in performing these services as well as highlighting the Bidder's stated qualifications and skills.
 - i. Customized Energy Solutions is an energy advisory and service company headquartered in Philadelphia, USA. CES has five major business lines: market Intelligence, which provides services focused on analyzing and disseminating evolving market, policy, and regulatory rules; wholesale services, which provides services for market scheduling and physical operations; retail services, which serves the needs of deregulated energy markets with billing and back-office operations; future grid, which focuses on participation of distributed resources in energy and demand response markets; and emerging technologies which specializes in providing consulting services for energy storage and emerging technologies driving the clean energy transition.

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DATE: 10/24/2024

EVALUATOR NAME: Lindsay Gilton

EVALUATOR DEPARTMENT: Governor's Energy Office

- ii. The Bidder's three project examples include:
 - 1. Performed a benefit-to-cost analysis evaluating various policy proposals – a strike price as upfront payment, performance incentives, and wholesale distribution tariff to reduce cost – to incentivize distribution-connected BESS projects in Eversource and United Illuminating (UI) services territories in Connecticut.
 - 2. Hired by Connecticut Green Bank to complete an analysis evaluating the economics of, barriers to, and benefits of front-of-the-meter storage development for the Connecticut Public Utilities Regulatory Authority.
 - 3. Launched the Clean Peak Market Outlook (CPMO) service to provide market participants with an analysis of supply/demand fundamentals, key drivers, and uncertainties of the emerging Massachusetts Clean Peak Energy Standard market.

- ii. Subcontractors
 - a. Bidder will not utilize subcontractors.

- iii. Organizational Chart
 - a. Bidders provided an organizational chart. The organizational chart includes the project being proposed and each position is identified by position title and corresponding to the personnel job descriptions.

- iv. Litigation
 - a. Energy Partners v. Customized Energy Solutions, Ltd.; Monmouth Cty., N.J., Docket No. L-3525-23, Dispute re payment of fees for employee recruiting services; \$50,000+ sought; \$40,000 compromise settlement paid by CES.

- v. Licensure/Certification
 - a. Bidder included a W9.

- vi. Certificate of Insurance
 - a. Bidder provided a certificate of insurance on a standard ACORD form.

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Customized Energy Solutions (CES), Ltd.

DATE: 10/24/2024

EVALUATOR NAME: Lindsay Gilton

EVALUATOR DEPARTMENT: Governor's Energy Office

Section III Proposed Services (File #3)

I. Services to be Provided

a. Discuss the Scope of Services referenced above in Part II of the RFP and what the Bidder will offer. Give particular attention to describing the methods and resources you will use and how you will accomplish the tasks involved. Also, describe how you will ensure expectations and/or desired outcomes as a result of these services will be achieved. If subcontractors are involved, clearly identify the work each will perform.

i. Task 1: Maine Clean Energy Research, Demonstration, and Financing Baseline Report

1. Define the specific priorities focused on the current state of clean energy economic development in the state; schedule information interview with all relevant state agencies, in-state funds, financial institutions, and other key stakeholders; conduct research using public information, previously developed material, and subject matter experts; create baseline report on key findings and recommendations

ii. Task 2: Maine Clean Energy Research, Demonstration, and Financing Strategy Report

1. Draw from this expertise to identify states with existing financial mechanisms to help inform a potential strategy of the state of Maine; conduct at least five interviews with out-of-state funds and financial institutions to identify drivers for investment, case studies of successful projects, and appetite for Maine projects; conduct desktop research to complete the picture of the other state financing vehicles, programs access to and timespan of capital and strategies to enable clean economic development; take key findings, in combination with the feedback from the public comment process, and develop policy and programmatic recommendations for the state of Maine

iii. Public Comment (Task 3)

1. Initiate the initial public comment opportunities to inform the study content & process; determine a suitable online location to inform public on the study process, solicit comments from the public and gather initial intelligence; coordinate with the state on the public comment processes

**STATE OF MAINE
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EVALUATOR DEPARTMENT: Governor's Energy Office

- iv. Task 4: Technical Assistance for Strategy Implementation
 - 1. Create the core guidance and incentive package offerings tailored to target investments identified by the reports; identify three potential projects that can serve as case studies for the proposed policy and use modeling software to generate revenue forecasts for the projects, considering the policy

- II. Implementation - Work Plan
 - a. Provide a realistic work plan for the implementation of the program through the first contract period. Display the work plan in a timeline chart. Concisely describe each program development and implementation task, the month it will be carried out and the person or position responsible for each task. If applicable, make note of all tasks to be delegated to subcontractors.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: CLEARResult Consulting, Inc.

DATE: 10/24/2024

EVALUATOR NAME: Lindsay Gilton

EVALUATOR DEPARTMENT: Governor's Energy Office

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:

Section I Preliminary Information (File #1)

- i. Proposal Cover Page & Responsible Bidder Certification
 - a. Bidder completed the Proposal Cover Page. The Proposal Cover Page is dated and signed by the Vice President, SEM & Carbon Consulting Practice.
 - b. Bidder completed the Responsible Bidder Certification. The Responsible Bidder Certification is dated and signed by the Vice President, SEM & Carbon Consulting Practice.

Section II Organization Qualifications and Experience (File #2)

- i. Overview of the Organization
 - a. Bidders completed the Qualifications and Experience Form. Bidder included three examples of projects which demonstrate their experience and expertise in performing these services as well as highlighting the Bidder's stated qualifications and skills.
 - i. CLEARResult is a provider of energy efficiency and decarbonization services in North America, and has experience designing, studying, and implementing energy programs for communities, public entities, utilities, businesses, and residential energy customers to define and achieve energy efficiency and decarbonization goals. CLEARResult has a current portfolio of more than 190 utility partners and public-sector clients and 1,650 energy programs.
 - ii. The Bidder's three project examples include:
 - 1. Program management and field services for several of Efficiency Maine's Residential Energy Efficiency Programs including their Distributor Program, Retail Program, Home

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EVALUATOR DEPARTMENT: Governor's Energy Office

Energy Solutions (HES) Program, and Low-Income Program.

2. Expansion of DOE's original TECHTEST report that simplifies and standardizes a methodology for lifecycle assessments and technical economic assessment for research and development professionals; developing more detailed industrial subsector models (adding cement and pulp and paper) that marry the top-down forecasting approaches used in the original effort with detailed bottom-up assessments of technological change.
 3. Provides all programmatic support activities for the Geothermal Electricity Tax Credit Offering program through the Colorado Energy Office, including but not limited to technical evaluation, marketing, education, outreach, development of program standards and guidelines, reporting criteria, and other miscellaneous programmatic support as requested by CEO.

- ii. Subcontractors
 - a. CLEARResult does not plan to utilize subcontractors.

- iii. Organizational Chart
 - a. Bidders provided an organizational chart. The organizational chart includes the project being proposed and each position is identified by position title and corresponding to the personnel job descriptions.

- iv. Litigation
 - a. "The Company has been subject to legal proceedings, claims and litigation arising in the ordinary course of business. These matters have not materially impacted client work and the Company does not expect the ultimate costs to resolve these matters to have a material adverse effect on Company's consolidated financial condition, results of operations or cash flows."

- v. Licensure/Certification
 - a.

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: CLEARResult Consulting, Inc.

DATE: 10/24/2024

EVALUATOR NAME: Lindsay Gilton

EVALUATOR DEPARTMENT: Governor's Energy Office

- vi. Certificate of Insurance
 - a. Bidder provided a certificate of insurance on a standard ACORD form.

Section III Proposed Services (File #3)

- I. Services to be Provided
 - a. Maine Clean Energy Economic Development Baseline Report
 - i. Engage GEO stakeholders and other participants to define the current capital ecosystem for clean energy development and critically enabling infrastructure projects; draw on our experience with state governments to conduct a thorough review of existing studies and reports; leverage our experience running incentive, rebate, and grant programs to analyze Maine's clean energy financing landscape and benchmark it against states with similar initiatives; summarize key findings to GEO and later to the public
 - b. Maine Clean Energy Research, Demonstration, and Financing Strategy Report
 - i. Leverage geographic network, technical capacity, and diverse project portfolio to conduct in-depth research into successful out-of-state funding strategies; research and identify energy efficiency and renewable energy opportunities that are available to state entities; establish robust metrics to evaluate and prioritize state programs; conduct data analytics and techno-economic modeling to assess emerging market opportunities in areas such as renewable energy, grid modernization, energy storage, and transportation electrification; summarize key findings to GEO and later to the public
 - 1. Prioritize action items aimed at reducing risk premiums, capitalizing on emerging markets, encouraging collaboration between public and private entities, and supporting energy justice
 - c. Public comment process
 - i. Deliver informative and engaging presentations to GEO and the public that convey each report's insights, recommendations, and strategies; facilitate multiple feedback channels throughout the public comment process for stakeholders to submit feedback; analyze and aggregate key insights after gathering and compiling public input
 - d. Technical assistance for strategy implementation

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

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DATE: 10/24/2024

EVALUATOR NAME: Lindsay Gilton

EVALUATOR DEPARTMENT: Governor's Energy Office

- i. Develop customized guidance and incentive packages to attract investments highlighted in the Strategy Report; Conduct comprehensive market analysis to identify potential projects and policy recommendations that advance Maine's clean energy objectives and demonstrate significant economic impact; create a helpdesk and deliver responsive and knowledgeable support to all program participants to ensure smooth navigation through every step of the process

II. Implementation - Work Plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: London Economics International LLC

DATE: 10/25/2024

EVALUATOR NAME: Lindsay Gilton

EVALUATOR DEPARTMENT: Governor's Energy Office

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:

Section I Preliminary Information (File #1)

- i. Proposal Cover Page & Responsible Bidder Certification
 - a. Bidder completed the Proposal Cover Page. The Proposal Cover Page is dated and signed by the Chief Economist.
 - b. Bidder completed the Responsible Bidder Certification. The Responsible Bidder Certification is dated and signed by the Chief Economist.

Section II Organization Qualifications and Experience (File #2)

- i. Overview of the Organization
 - a. Bidders completed the Qualifications and Experience Form. Bidder included three examples of projects which demonstrate their experience and expertise in performing these services as well as highlighting the Bidder's stated qualifications and skills.
 - i. London Economics International LLC is a global economic, financial, and strategic advisory professional services firm specializing in energy, water, and infrastructure.
 - ii. The Bidder's three project examples include:
 - 1. Engaged by the Maine Public Utilities Commission to 1) identify options for selling the output from the portfolio of renewable energy resources procured by and under contract with two transmission and distribution ("T&D"); and 2) provide analysis of those options, including modeling of the various options for selling the output, to identify which option(s) are most likely to maximize the value for Maine ratepayers.

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EVALUATOR DEPARTMENT: Governor's Energy Office

2. Engaged by Maine Public Utilities Commission ("MPUC") to assist in examining alternatives for procurement of Standard Offer Service ("SOS").
 3. Assisted the Maine PUC in its investigation of Central Maine Power Company management issues and related ratemaking and performance incentive mechanisms.
 - ii. Subcontractors
 - a. Not articulated.
 - iii. Organizational Chart
 - a. Bidders provided an organizational chart. The organizational chart includes the project being proposed and each position is identified by position title and corresponding to the personnel job descriptions.
 - iv. Litigation
 - a. No pending or completed litigation in the last five years.
 - v. Licensure/Certification
 - a. N/A
 - vi. Certificate of Insurance
 - a. Bidder provided a certificate of insurance on a standard ACORD form.

Section III Proposed Services (File #3)

- I. Services to be Provided
 - a. Kickoff meeting/stakeholder engagement
 - i. Allows for public comment to inform the study content and process; deliverable for this task will be a memo outlining what was learned from the public comment process, how to implement findings into a proposed methodology, and the next steps for producing a baseline report.
 - b. Baseline report
 - i. Perform analysis of public and private financing mechanisms supporting clean energy and enabling infrastructure in Maine; focus is on identifying opportunities to streamline and coordinate funding sources to promote clean energy projects and cleantech businesses; stakeholder interviews, desktop research, and analysis of unique financial risks in Maine to provide a detailed assessment

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: London Economics International LLC

DATE: 10/25/2024

EVALUATOR NAME: Lindsay Gilton

EVALUATOR DEPARTMENT: Governor's Energy Office

of current financing structures and their alignment with Maine's clean energy goals.

- c. Strategy report
 - i. Produce an advisory report to deliver strategic recommendations for achieving Maine's clean energy economic development goals; focus on emerging market opportunities, informed by case studies and interviews with financing institutions from other states; analyze policy options, assess investment risks unique to Maine, and recommend collaboration frameworks between public entities and financial institutions.
 - d. Technical support for strategy implementation
 - i. Focus will be on creating guidance and incentive packages to attract investment, developing candidate projects for economic growth, and responding to technical inquiries.
- II. Implementation - Work Plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Sustainable Energy Advantage (SEA) LLC

DATE: 10/25/2024

EVALUATOR NAME: Lindsay Gilton

EVALUATOR DEPARTMENT: Governor's Energy Office

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:

Section I Preliminary Information (File #1)

- i. Proposal Cover Page & Responsible Bidder Certification
 - a. Bidder completed the Proposal Cover Page. The Proposal Cover Page is dated and signed by the Vice President and Senior Director.
 - b. Bidder completed the Responsible Bidder Certification. The Responsible Bidder Certification is dated and signed by the Vice President and Senior Director.

Section II Organization Qualifications and Experience (File #2)

- i. Overview of the Organization
 - a. Bidders completed the Qualifications and Experience Form. Bidder included three examples of projects which demonstrate their experience and expertise in performing these services as well as highlighting the Bidder's stated qualifications and skills.
 - i. Sustainable Energy Advantage (SEA) was formed in 1999 as a consulting and advisory firm specializing in clean energy market, policy, strategic and financial analysis. SEA has been analyzing renewable energy policy and markets for 25 years, supporting nearly 200 clients, including 40 governmental entities.
 - ii. The Bidder's three project examples include:
 - 1. Completed an economic and benefit-cost analysis (BCA) of potential expansions associated with Rhode Island's Renewable Energy Growth (REG), net metering and virtual net metering programs to help contextualize legislative proposals to expand each program during the 2023 General

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 10/25/2024

EVALUATOR NAME: Lindsay Gilton

EVALUATOR DEPARTMENT: Governor's Energy Office

- Assembly session, following the enactment of the Inflation Reduction Act of 2022.
 - 2. Provided quantitative technical analysis to support and inform policymaker and stakeholder discussions regarding the potential expansion of Vermont's Renewable Energy Standard.
 - 3. Worked with GEO and the PUC on a comprehensive evaluation of Maine's Renewable Portfolio Standard and large-scale renewable procurement policies.
- ii. Subcontractors
 - a. SEA will utilize one subcontractor for this project. The subcontractor's full information is listed in the file.
- iii. Organizational Chart
 - a. Bidders provided an organizational chart. The organizational chart includes the project being proposed and each position is identified by position title and corresponding to the personnel job descriptions.
- iv. Litigation
 - a. SEA is not involved in any current litigation and has not been involved in any litigation cases closed in the last five years.
- v. Licensure/Certification
 - a. N/A
- vi. Certificate of Insurance
 - a. Bidder provided a certificate of insurance on a standard ACORD form.

Section III Proposed Services (File #3)

- I. Services to be Provided
 - a. Baseline Report
 - i. Conduct approximately 6-8 public sector interviews and 6-8 private sector interviews; gather, review, and structure the feedback and then develop a draft PowerPoint presentation to convey findings to GEO; finalize the report based on GEO's feedback and deliver a public presentation.
 - b. Strategy Report

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

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DATE: 10/25/2024

EVALUATOR NAME: Lindsay Gilton

EVALUATOR DEPARTMENT: Governor's Energy Office

- i. Draw upon Northeast Eyes and Ears and PJM Eyes and Ears, SEA's regulatory, legislative and policy tracking service to develop straw recommendations to GEO (for inclusion in a second set of surveys) for the best peer states in question that have focused on attracting clean energy businesses focused on front-of-meter project development, construction, operation, and supporting infrastructure; from this select interviewees and complete approximately 2-4 public sector interviews (no more than one per state), and a complement of 6-8 private sector interviews; re-contact all of the interviewees in Maine to understand their views on the emerging recommendations from the interviews in other states; PowerPoint presentation for delivery to GEO (and eventual public delivery) with all proposed findings and strategic recommendations
- c. Public comment process
 - i. For each instance of public comment, the SEA team plans to utilize a five-step approach: work with GEO (and other financing agencies) to identify the best channels to contact potential commenters; develop the comment prompt, and review it with GEO; revise comment prompt based on GEO input solicit feedback through official channels (and work with regional trade organizations SEA has relationships with to enhance the volume of feedback); summarize feedback in a 3–4-page bulleted memorandum for GEO

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Sustainable Energy Advantage (SEA) LLC

DATE: 10/25/2024

EVALUATOR NAME: Lindsay Gilton

EVALUATOR DEPARTMENT: Governor's Energy Office

II. Implementation - Work Plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Banyan Infrastructure & Summit Advisory

DATE: 10/24/2024

EVALUATOR NAME: Wendy J Crosier

EVALUATOR DEPARTMENT: Governor's Energy Office

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:

Section I Preliminary Information (File #1)

- i. Proposal Cover Page & Responsible Bidder Certification
 - a. San Francisco, CA
 - b. 180 days for pricing structure from date/time of bid opening
 - c. 3-year for certification civil judgement

Section II Organization Qualifications and Experience (File #2)

- i. Overview of the Organization
 - a. project finance software and advisory services company
 - b. more than 50 people (advisory, engineering, product design, customer success, sales, marketing, operations)
 - c. Elemental Impact portfolio company (NY Green Bank, Standard Solar, Colorado Clean Energy Fund)
 - d. sustainable infrastructure finance and asset management, strategic planning, investment origination and underwriting, portfolio and risk management, capital and liquidity management, treasury operations, and comprehensive stakeholder reporting
 - e. finance & energy advisory
 - f. no contract history with state of Maine
 - g. software is purpose-built to optimize sustainable infrastructure financing across the deal life cycle
- ii. Subcontractors - Summit Advisory LLC
 - a. Consultancy - energy, infrastructure, and finance
 - b. Michael Barg – independent work; history with GS, McKinsey, AES, Lazard

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Banyan Infrastructure & Summit Advisory

DATE: 10/24/2024

EVALUATOR NAME: Wendy J Crosier

EVALUATOR DEPARTMENT: Governor's Energy Office

- iii. Organizational Chart
 - a. CIO/CFO - Principal Investments/Project Finance, Credit Finance, private capital markets, tax teams
 - b. launched a Direct Lending business
 - c. 4 weeks to produce financial model and stand-up financial planning & analysis function
 - d. Partnerships - Boundary Stone Partners
 - e. Collin Harris, Exec of Advisory Services – POC for Summit Advisory
 - f. COO – Li, Also McKinsey
 - g. MGMT 9FTE, 46 FTE

- iv. Litigation
 - a. N/A

- v. Licensure/Certification
 - a. No legal, tax, accounting, audit or other expertise

- vi. Certificate of Insurance
 - a. - General Liability, Umbrella Liability, Cyber/Tech E&O, D&O/Fiduciary, Crime

Section III Proposed Services (File #3)

- I. Services to be Provided
 - a. Strategic consulting, sustainable infrastructure investment, research, recommendations with data-driven supporting research, analysis & feasibility Report
 - b. Baselines Report –
 - i. 1) to define the economics of clean energy and critical enabling infrastructure project financing in Maine;
 - ii. 2) to define the in-State capital stack for clean energy businesses and projects seeking investment above a certain threshold;
 - iii. 3) to develop programmatic and policy options for financing clean energy research and demonstration in Maine. Banyan-Summit will confirm the key areas of study (i.e., “specific priorities that will be supported by recommendations”, as per RFP)
 - iv. Energy demand and supply dynamics (consumption and production), baseload, transmission, current clean energy sources (e.g., hydropower) and opportunities for demand reduction,

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

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EVALUATOR NAME: Wendy J Crosier

EVALUATOR DEPARTMENT: Governor's Energy Office

distributed energy resources (front-of-the-meter) and energy efficiency

- v. Existing clean energy policy and available capital sources
- vi. Market barriers and/or financing gaps
- vii. a quantitative benchmark to comparable states
- viii. incorporate feedback - interviews with key stakeholders

II. Implementation - Work Plan

- a. Baseline Report - 11/15-12/14, 1 week of drafting
- b. Public Comment Process - 11/15 - 3/30; report presentation, feedback, summary
- c. Strategy Report – policy & program 12/14-2/15 & presentation to GEO
- d. 1) Analyze public and private financing mechanisms (including risk premiums, project finance structuring approaches, potential public-private partnerships);
- e. 2) recommendations for coordination between GEO, DECD, EMT, MTI, FAME, MVF, MITC, the private sector, other funds and financial institutions (including additional public and private sector capital).
- f. feasibility study of program design options
- g. public outreach and engagement process; expert interviews Guidepoint, AlphaSights, or similar; Boundary Stone Partners – Climate Change
- h. Technical Assistance | 6/30/2025 - 9/30/2025; through contract renewal

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: BW Research Partnership, Inc

DATE: 10/25/2024

EVALUATOR NAME: Wendy J Crosier

EVALUATOR DEPARTMENT: Governor's Energy Office

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:

Section I Preliminary Information (File #1)

- i. Proposal Cover Page & Responsible Bidder Certification
 - a. 180 days from the date and time of the bid opening
 - b. Signed Philip Jordan, VP
 - c. 3 year for civil judgement, clear

Section II Organization Qualifications and Experience (File #2)

- i. Overview of the Organization
 - a. research and strategic consulting (climate & energy)
 - b. led hundreds of policy implementation, workforce, supply chain, community benefit, market research studies
 - c. founded in 2006 – offices in: California, Massachusetts, and São Paulo, Brazil
 - d. has not previously provided services to state of Maine
- ii. Subcontractors
 - a. N/A
- iii. Organizational Chart
 - a. Project Manager > Director > Associate PM > SNR Analyst > x2 Analyst
- iv. Litigation
 - a. BW Research has not, and is not currently, been subject to any past or current litigation
- v. Licensure/Certification

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: BW Research Partnership, Inc

DATE: 10/25/2024

EVALUATOR NAME: Wendy J Crosier

EVALUATOR DEPARTMENT: Governor's Energy Office

- a. Jordan - LUMA-certified facilitator of human centered design.

- vi. Certificate of Insurance
 - a. Hartford Service – Texas, USA

Section III Proposed Services (File #3)

- I. Services to be Provided
 - a. Presented by MA/CA offices
 - b. pioneered the field of climate and energy economic and workforce research
 - c. extensive experience with key stakeholders in Maine's clean energy ecosystem, including employers, educators, union leaders
 - d. conducted the Clean Energy Industry Report in Maine each year since its inception
 - e. led workforce and supply chain roadmap analyses for the state's offshore wind cluster
 - f. clean energy research, demonstration, and financing analysis and advisory study:
 - i. identifying growth opportunities in Maine's clean energy capital availability, identifying best practices and models to support effective strategy development, ensuring that financing mechanisms and incentive program initiatives
 - ii. primary and secondary research methods including executive interviews, literature review and case studies, secondary data collection, economic benefits analysis

- II. Implementation - Work Plan
 - a. weekly or bi-weekly check-in calls between BW Research and the Maine GEO team
 - b. 1.0: Conduct Kickoff Meeting and Formalize Research Plan
 - c. 1.1: Review Foundational Literature and Current Clean Energy Landscape
 - i. best practices for designing, implementing, and expanding clean energy financing mechanisms, incentive programs, desktop research, exploring the economic and workforce implications of these challenges, identify bodies with legal authority in the context of clean energy development and expansion
 - d. 1.2: Create Regional Financing and Incentive Program Inventory
 - i. inventory of regional, state, and federal clean energy financing mechanisms and incentive programs available in Maine; include

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202409176

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EVALUATOR NAME: Wendy J Crosier

EVALUATOR DEPARTMENT: Governor's Energy Office

available information on funding types and offerings, programs' underlying funding sources, eligibility requirements, program structure, capital deployment timelines

- e. 1.3: Conduct Executive Interviews of Key Stakeholders
 - i. conduct executive interviews with 15 to 20 key stakeholders identified in collaboration w/ GEO - identified state agencies (GEO, DECD, MTI, etc.), clean energy firms, financial institutions, incentive providers
- f. 1.4: Produce Baseline Report and Presentation
 - i. internal presentation of key findings
 - ii. baseline report - data, methods, trends, key findings, and the current landscape of Maine's clean energy financing mechanism and incentive program
 - iii. a presentation distilling key findings and takeaways from the baseline report – 2nd comment period
graphic design team will finalize this baseline report and presentation
- g. 2.1: Incorporate Feedback and Identify Benchmarking Criteria
 - i. review all baseline report feedback
 - ii. debrief GEO
 - iii. develop a suite of performance benchmarking criteria for clean energy financing and incentive programs
- h. 2.2: Develop Case Studies of Comparable Programs
 - i. case studies of successful financing mechanisms and incentive program implementations
 - ii. state by state comparison
- i. 2.3: Conduct Gap Analysis and Develop Potential Program Recommendations
 - i. identify areas of funding need for underserved
 - ii. and emerging clean energy technologies
 - iii. highlight programs, by funding type and delivery methods
- j. 2.4: Produce Final Strategy Report and Presentation
 - i. • Identify gaps in Maine's current clean energy incentive offerings and barriers to access.
 - ii. • Highlight case studies of comparable mechanisms and programs in other states.
 - iii. • Provide recommendations and implementation strategies for potential clean energy

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202409176

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EVALUATOR NAME: Wendy J Crosier

EVALUATOR DEPARTMENT: Governor's Energy Office

- iv. financing programs, leveraging the case studies, executive interview findings, economic impact modeling, and gap analysis efforts.
- v. • Inform stakeholders of prospective partnerships and collaborative opportunities that may strengthen Maine's clean energy financing ecosystem and capital pipelines.
- k. 3.1: Initial Public Comment Convening
- l. 3.2: Baseline Report Public Comment Convening
- m. 3.3: Final Strategy Report Public Comment Convening
- n. 4.1: Host 4 Human-Centered Design Session to Identify Priorities
 - i. n key findings, brainstorm implementation ideas, and prioritize potential opportunities
 - ii. "Importance-Difficulty Matrix"
 - iii. concrete policies, programs, and implementation strategies via iterative concept ideation.
- o. . Technical assistance strategy report that identifies the most effective implementation strategies for proposed programs and identifies a list of potential project candidates for the proposed programs.
- p. Ongoing technical assistance and Q&A support through the entire estimated project period of Task 4, fielding any inquiries from the Maine GEO team and other interested partners or stakeholders

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Customized Energy Solutions Ltd.

DATE: 10/25/2024

EVALUATOR NAME: Wendy J Crosier

EVALUATOR DEPARTMENT: Governor's Energy Office

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:

Section I Preliminary Information (File #1)

- i. Proposal Cover Page & Responsible Bidder Certification
 - a. Philadelphia, PA – NY, IN, TX, CA, USA, Canada, Japan, Vietnam
 - b. Pricing - 180 days from the date and time of the bid opening
 - c. Signed Madeline Frierson, Lead Consultant
 - d. 3 year civil judgment - clear

Section II Organization Qualifications and Experience (File #2)

- i. Overview of the Organization
 - a. energy advisory and service company, software & consulting
 - b. market participants, project developers, investors, tax equity companies, technology providers, marketers, utilities, and policy makers
 - c. 400 employees internationally
 - d. Market Intelligence, Wholesale Services, Retail, Future Grid, Emerging Technologies
 - e. Emerging Technologies submits bid - energy storage, renewables, and hybrid projects to global investors, project developers, independent power producers, technology companies, and electric utilities
 - f. 14,000 MW of energy storage and hybrid projects
 - g. proprietary set of analytical models called CoMETS (Comprehensive Market Evaluation Tools for Storage)
- ii. Subcontractors
 - a. CES does not play to contract any of the scope to a subcontractor.
- iii. Organizational Chart

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Customized Energy Solutions Ltd.

DATE: 10/25/2024

EVALUATOR NAME: Wendy J Crosier

EVALUATOR DEPARTMENT: Governor's Energy Office

- a. PM > Advisor > x5 Lead Advisors

- iv. Litigation
 - a. Energy Partners v. Customized Energy Solutions, Ltd.; Monmouth Cty., N.J., Docket No. L-3525-23, Dispute re payment of fees for employee recruiting services; \$50,000+ sought; \$40,000 compromise settlement paid by CES.

- v. Licensure/Certification
 - a. W-9

- vi. Certificate of Insurance
 - a. Hartford

Section III Proposed Services (File #3)

- I. Services to be Provided
 - a. CES plans to adhere to the proposed schedule and deliverables presented in the RFP and understand that this scope of work will require partnership with the various state organizations.

- II. Implementation - Work Plan
 - a. Gantt chart & Team Member Tasks Provided
 - b. Maine Clean Energy Research, Demonstration, and Financing Baseline Report
 - i. Hold interviews with relevant state agencies, in-state funds, and financial institutions 12/6/2024
 - ii. impressions of current public and private financing mechanisms, barriers to accessing these funds, and suggested improvements
 - iii. interconnection queues, state reports, press releases) to perform quantitative benchmarking
 - iv. meeting with GEO to provide key findings
 - c. Baseline Report – Public Comment (Task 3)
 - i. public comment opportunity to inform the study content & process
 - ii. shared with GEO by January 17th 2025
 - d. Task 2: Maine Clean Energy Research, Demonstration, and Financing Strategy Report
 - i. 2-4 other states to inform the development of strategy
 - ii. desktop research

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

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BIDDER NAME: Customized Energy Solutions Ltd.

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EVALUATOR NAME: Wendy J Crosier

EVALUATOR DEPARTMENT: Governor's Energy Office

- e. Strategy Report – Public Comment (Task 3)
 - i. CES will leverage the Research Lead to gather the feedback from the public comment process. This process will conclude on March 7
 - ii. CES will leverage the Research Lead to gather the feedback from the public comment process. This process will conclude on March 7
- f. Task 4: Technical Assistance for Strategy Implementation
 - i. identify three (3) potential projects that can serve as case studies for the proposed policy.
 - ii. CES will use their modeling software to generate revenue forecasts for the projects, considering the policy

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: CLEAResult Consulting Inc.

DATE: 10/25/2024

EVALUATOR NAME: Wendy J Crosier

EVALUATOR DEPARTMENT: Governor's Energy Office

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:

Section I Preliminary Information (File #1)

- i. Proposal Cover Page & Responsible Bidder Certification
 - a) Austin, TX
 - b) Pricing - 180 days from the date and time of the bid opening
 - c) Signed Keri Macklin, VP
 - d) 3 year civil penalty - clear

Section II Organization Qualifications and Experience (File #2)

- i. Overview of the Organization
 - a) general management support and program oversight, subject matter expertise as appropriate, budget keeping, and accountability
 - b) energy studies, community engagements, and work in rural communities
- ii. Subcontractors
 - a) The CLEAResult Team does not intend to use any subcontractors on this opportunity
- iii. Organizational Chart
 - a) Management x5 > Engineering x2 > Subject Matter Expert > Consultant
- iv. Litigation
 - a) The Company has been subject to legal proceedings, claims and litigation arising in the ordinary course of business. These matters have not materially impacted client work and the Company does not expect the ultimate costs to resolve these matters to have a material adverse effect on Company's consolidated financial condition, results of operations or cash flows.
- v. Licensure/Certification
 - a) Individual per Team Member

STATE OF MAINE
INDIVIDUAL EVALUATION NOTES

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: CLEAResult Consulting Inc.

DATE: 10/25/2024

EVALUATOR NAME: Wendy J Crosier

EVALUATOR DEPARTMENT: Governor's Energy Office

- vi. Certificate of Insurance
 - a) Zurich American Insurance

Section III Proposed Services (File #3)

- I. Services to be Provided
 - a) Assessment of Maine's current clean energy and related business incentive programs, bonding authorities, access to in-state capital, and timespan of in-state capital deployment for clean energy projects and critical enabling infrastructure
 - b) Analysis and identification of risk premiums unique to Maine that create barriers to clean energy economic development, and their financial implications.
 - c) Review of other states' financing vehicles, programs, access to and timespan of capital, and strategies to enable clean energy economic development.
 - d) Policy and programmatic options to achieve Maine's goals, and recommendations for strategic areas of focus
 - e) Analysis of costs and benefits of those options for Maine taxpayers, ratepayers, and businesses
 - f) Task 1: Maine Clean Energy Economic Development Baseline Report
 - I. Research, regular meetings, incentive/rebate/grant experience, communicate technical information
 - g) Task 2: Maine Clean Energy Research, Demonstration, and Financing Strategy Report
 - I. Research opportunities, use existing network, establish metrics, turn report into presentations
 - h) Task 3: Public Comment Process
 - I. Multiple feedback channels, analyze key insights
 - i) Task 4: Technical Assistance for Strategy Implementation
 - I. Develop customized incentives/guidance package
 - II. Conduct market analysis
 - III. Create helpdesk and offer knowledge/support
- II. Implementation - Work Plan
 - a) begins on November 15, 2024, and will conclude on May 31, 2025
 - b) Includes Workplan chart – Task/Item with Task lead & timeline

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: London Economics International LLC

DATE: 10/25/2024

EVALUATOR NAME: Wendy J Crosier

EVALUATOR DEPARTMENT: Governor's Energy Office

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:

Section I Preliminary Information (File #1)

- i. Proposal Cover Page & Responsible Bidder Certification
 - a. Pricing - 180 days from the date and time of the bid opening
 - b. Signed - Marie Fagan, Chief Economist
 - c. Have not within a three (3) year period preceding this proposal had one or more federal, state, or local government transactions terminated for cause or default

Section II Organization Qualifications and Experience (File #2)

- i. Overview of the Organization
 - a. LEI was engaged by the Maine Public Utilities Commission to
 - i. 1) identify options for selling the output from the portfolio of renewable energy resources procured by and under contract with two transmission and distribution ("T&D"); and
 - ii. 2) provide analysis of those options, including modeling of the various options for selling the output, to identify which option(s) are most likely to maximize the value for Maine ratepayers.
 - iii. London Economics International LLC ("LEI") was engaged by Maine Public Utilities Commission ("MPUC") to assist in examining alternatives for procurement of Standard Offer Service ("SOS").
 - iv. LEI assisted the Maine PUC in its investigation of Central Maine Power Company management issues and related ratemaking and performance incentive mechanisms - [Docket No. 2022-00038]
- ii. Subcontractors
 - a. N/A
- iii. Organizational Chart

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: London Economics International LLC

DATE: 10/25/2024

EVALUATOR NAME: Wendy J Crosier

EVALUATOR DEPARTMENT: Governor's Energy Office

- a. Project Manager/Project Advisor > Senior Consultant/Research Associate
> Admin Support
- iv. Litigation
 - a. LEI is neither currently, nor has it been within the last five years, in any litigation in which it had to pay a claimant as part of a settlement or by decree.
- v. Licensure/Certification
 - a. Not offered
- vi. Certificate of Insurance
 - a. Federal Insurance Company

Section III Proposed Services (File #3)

- I. Services to be Provided
 - a. 1.1 Purpose of engagement
 - I. supporting policy and program development to facilitate clean energy economic development
 - II. i) define the economics of clean energy and critical enabling infrastructure project financing in Maine,
 - III. ii) define the in-State capital stack for clean energy businesses and projects seeking investment above a certain threshold, and
 - IV. iii) develop programmatic and policy options for financing clean energy research and demonstration in Maine.
 - b. 1.2 Maine clean energy research, demonstration, and financing baseline report
 - I. identify potential financing vehicles and incentive programs, new and expanded lending options, including State finance and incentive programs, and bonding authorities that may be utilized
 - II. interviews with state agencies, in-state funds, financial institutions, and clean energy/cleantech businesses
 - III. provide context specific solutions that consider Maine's unique socio-economic characteristics
 - IV. baseline report to the public, compile feedback, refine report based on feedback, and clearly outline how the public comment process was used to refine the baseline report

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: London Economics International LLC

DATE: 10/25/2024

EVALUATOR NAME: Wendy J Crosier

EVALUATOR DEPARTMENT: Governor's Energy Office

- c. 1.3 Maine clean energy research, demonstration, and financing strategy report
 - I. 2-4 states that will inform the development of a strategy to achieve Maines clean energy goals
 - II. informational interviews with out-of-state funds and financial institutions to identify drivers for investment, case studies of successful projects, and appetite for clean energy projects
 - III. completed by February 15th, 2025
 - IV. final strategy report, discussion with GEO, and presentation of baseline report to the GEO and the general public + public feedback and report on findings
 - d. 1.4 Technical assistance for strategy implementation
 - I. References past projects as examples
- II. Implementation - Work Plan
- a. Gantt workplan schedule included
 - b. 2.1 Task 1: Kick-off meeting/stakeholder engagement
 - I. Introductions to the project team members;
 - II. • Expectations regarding the tasks and deliverables;
 - III. • Scheduling and refining key milestones; scheduling check-in calls, and agreement on communications channels and protocols; and
 - IV. Discussion pertaining to data requests.
 - V. Well developed stakeholder engagement plan
 - c. 2.2 Task 2: Maine clean energy research, demonstration, and financing baseline report
 - I. stakeholder interviews, desktop research, and analysis of unique financial risks in Maine, the report will provide a detailed assessment of current financing structures
 - d. 2.2.1 Workstream 1: Recommendation priorities
 - e. 2.2.2 Workstream 2: Stakeholder interviews – ME State agencies
 - f. 2.2.3 Workstream 3: Financial landscape analysis
 - I. in-depth analysis of the financial landscape for clean energy projects and cleantech businesses, mapping out both public and private financing mechanisms
 - g. 2.2.4 Deliverable 1: Baseline report

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

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- I. • What financing mechanisms are available and how are they deployed in Maine?
- II. • What gaps exist in the current funding ecosystem?
- III. How does Maine's capital deployment for clean energy projects compare to other states?
- IV. • What are the financial risks unique to Maine, and how can they be mitigated?
- h. 2.3 Task 3: Maine clean energy research, demonstration, and financing strategy report
 - I. study will analyze policy options, assess investment risks unique to Maine, and recommend collaboration frameworks between public entities and financial institutions
- i. 2.3.1 Workstream 1: Clean energy financing mechanisms
 - I. 2-4 states that have successfully implemented clean energy financing mechanisms relevant to Maine's economic development goals
- j. 2.3.2 Workstream 2: Stakeholder interviews
 - I. informational interviews with key stakeholders, including representatives from out-of-state funds, financial institutions, and clean energy developers
- k. 2.3.3 Workstream 3: Policy and programmatic recommendations
- l. 2.3.4 Workstream 4: Emerging market opportunities
- m. 2.3.5 Deliverable 2: Strategy report
 - I. incorporate the results of the baseline study, stakeholder interviews, and research from other jurisdictions, analysis of the economic impacts of the proposed strategies
- n. 2.4 Optional Task 4: Technical assistance for strategy implementation
 - I. guidance and incentive packages to attract investment, developing candidate projects for economic growth, and responding to technical inquiries
- o. 2.4.1 Workstream 1: Core guidance and incentive packages
 - I. design tailored incentives that address the specific financial and regulatory needs of clean energy investors and developers

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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- p. 2.4.2 Workstream 2: High-potential economic development projects
 - I. d develop a list of high-potential economic development projects aligned with the Clean Energy Economic Development Strategy
- q. 2.4.3 Workstream 3: Implementation of the Clean Energy Economic Development Strategy
 - I. clarifying aspects of the guidance and incentive packages, providing expert advice on financing options, and assisting with project development questions
- r. 2.4.4 Deliverable 3:
 - I. summary memo detailing the technical assistance provided to the GEO and other partners throughout the implementation process

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Sustainable Energy Advantage, LLC

DATE: 10/25/2024

EVALUATOR NAME: Wendy J Crosier

EVALUATOR DEPARTMENT: Governor's Energy Office

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:

Section I Preliminary Information (File #1)

- i. Proposal Cover Page & Responsible Bidder Certification
 - a. Signed: Jason S. Gifford, VP

Section II Organization Qualifications and Experience (File #2)

- i. Overview of the Organization
 - a. a consulting and advisory firm specializing in clean energy market, policy, strategic and financial analysis
 - b. Framingham, Massachusetts, but also has staff based in Maine, Vermont, Maryland, and Illinois
- ii. Subcontractors
 - a. John Harper is an experienced cleantech/climate tech angel investor, project finance advisor, and clean power start-up finance executive
- iii. Organizational Chart
 - a. Project Manager > Senior Advisory x2 > Analysts X3
- iv. Litigation
 - a. SEA is not involved in any current litigation and has not been involved in any litigation cases closed in the last five years.
- v. Licensure/Certification
 - a. SEA has no relevant licensure / certification to provide.
- vi. Certificate of Insurance
 - a. ACORD Certificate of Liability Insurance

Section III Proposed Services (File #3)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202409176

RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and Advisory Study

BIDDER NAME: Sustainable Energy Advantage, LLC

DATE: 10/25/2024

EVALUATOR NAME: Wendy J Crosier

EVALUATOR DEPARTMENT: Governor's Energy Office

- I. Services to be Provided
 - a. 1.1 Task 1: Maine Clean Energy Research, Demonstration, and Financing Baseline Report
 - I. kickoff w/GEO
 - II. initial list of private sector financier interview targets
 - III. survey state agencies
 - IV. 6-8 public sector interviews, as well as 6-8 private sector interviews
 - V. 10–12-page prose report
 - b. 1.2 Task 2: Maine Clean Energy Research, Demonstration, and Financing Strategy Report
 - I. SEA's industry-leading regulatory, legislative and policy tracking service. Through our Eyes and Ears efforts, SEA closely tracks any developments related to clean energy policy, markets, project development and economic development efforts in New England
 - II. a 10-12-page prose report and respond to GEO edits to that report prior to its public release
 - c. 1.3 Task 3: Public Comment Process
 - I. 1. Work with GEO (and other financing agencies) to identify the best channels to contact potential commenters
 - II. 2. Develop the comment prompt, and review it with GEO
 - III. 3. Revise comment prompt based on GEO input
 - IV. 4. Solicit feedback through official channels (and work with regional trade organizations SEA has relationships with to enhance the volume of feedback)
 - V. 5. Summarize feedback in a 3–4-page bulleted memorandum for GEO
 - d. 1.4 Task 4: Technical Assistance for Strategy Implementation
- II. Implementation - Work Plan
 - a. Provides Gantt Chart & explanation of personal in each section of proposed services



STATE OF MAINE
GOVERNOR'S ENERGY OFFICE

Janet T. Mills
Governor

Dan Burgess
Director

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202409176

**RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and
Advisory Study**

I, Tagwongo Obomsawin accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Governor's Energy Office. 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

A handwritten signature in black ink, appearing to read 'Tagwongo Obomsawin', written over a horizontal line.

Date

10/25/2024



**STATE OF MAINE
Governor's Energy Office**

Janet T. Mills
Governor

Dan Burgess
Director

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202409176**

**RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and
Advisory Study**

I, Lindsay Gilton, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Governor's Energy Office. 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

10/22/2024
Date



**STATE OF MAINE
Governor's Energy Office**

Janet T. Mills
Governor

Dan Burgess
Director

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202409176**

**RFP TITLE: Clean Energy Research, Demonstration, and Financing Analysis and
Advisory Study**

I, Wendy J Crosier

_____ accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Governor's Energy Office. 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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A handwritten signature in blue ink, appearing to read 'Wendy J Crosier', written over a horizontal line.

Signature

10/22/2024

Date