



**Massachusetts Clean Energy Center
Request for Proposals (RFP): Advancing Commonwealth Energy Storage Program Consultant**

**RFP FY2017-ACES-02
Release Date: June 1, 2017
Applications Due: July 28, 2017 at 4:00pm**

1. PROGRAM SUMMARY AND GOALS

The Massachusetts Clean Energy Center (“MassCEC”) seeks applications from consultants or professionals with significant expertise in energy storage projects and energy analytics to serve as Program Consultants (“Program Consultant” or “Applicant”) under MassCEC’s Advancing Commonwealth Energy Storage Program (the “ACES Program”). Program Consultants will evaluate and verify the value of the storage system’s realized and non-monetizable benefits as reported by the ACES awardee. Under the Commonwealth’s Energy Storage Initiative, ACES seeks proposals for energy storage demonstration projects that pilot innovative, broadly replicable energy storage use cases/business models with multiple value streams in order to prime Massachusetts for increased commercialization and deployment of storage technologies.

Program Consultants will be responsible for providing technical and business model evaluation assistance to MassCEC on the review of ACES contracts, on the analyses of pro-formas and energy data, on defining the scope of work for ACES awardees, and on the general project management of the implementation and operation of awarded demonstration ACES projects.

MassCEC anticipates selecting one (1) Program Consultant under this RFP.

2. BACKGROUND

In 2015, the Baker-Polito Administration announced a two-phase, \$10 million dollar Energy Storage Initiative (“ESI”). The ESI aims to advance the energy storage segment of the Massachusetts clean energy industry by expanding storage technology markets, assigning value to storage benefits, accelerating the development of storage technologies, and attracting and supporting energy storage companies throughout the Commonwealth.

In the first phase of this initiative, MassCEC partnered with DOER on an Energy Storage Study (“State of Charge” or the “Study”) to obtain a broad view of energy storage technologies that will inform future policy and programs. The Study provided insights into Massachusetts-specific and regional context to advance energy storage interests in the Commonwealth based on analysis of grid conditions in Massachusetts and lessons from other states. The Study also identified a number of energy storage application use cases based upon modeling results and stakeholder feedback. These use cases may

inform business models applicable to energy storage installations in Massachusetts. More information on the study and stakeholder engagement efforts conducted to date can be found on MassCEC's website (www.masscec.com/energy-storage-study).

In addition to the ESI, recent utility grid modernization plans (required by the Department of Public Utilities ("DPU") under order DPU 12-76-B) include storage components, and, in response to An Act to Promote Energy Diversity, Bill H.4568 (the "Energy Diversity Bill"), the Massachusetts Department of Energy Resources ("DOER") has determined to set targets by mid-2017 for electric companies to procure energy storage.

ACES RFP

In the second phase, energy storage demonstration projects are being solicited through the ACES Request for Proposals (the "ACES RFP"), with the design of the RFP informed by recommendations from the Study. The ACES RFP aims to fulfill the Administration's commitment to promote energy storage across the Commonwealth.

Energy storage systems encompass technologies that store electrical energy or thermal energy and produce electricity or heating/cooling respectively when needed, as defined in the Energy Diversity Bill. Potential benefits of energy storage applications¹ include reducing grid and customer costs, integrating renewable energy within the electric grid, reducing congestion and relieving peak usage demands on the grid, reducing transmission and distribution costs and customer costs, and increasing energy resilience in the event of natural disasters. In addition, energy storage can serve as a key flexible resource in addressing the Commonwealth's energy challenges such as replacing retiring capacity, meeting the Global Warming Solutions Act (Chapter 298 of the Acts of 2008) requirements and greenhouse gas emissions targets and modernizing the grid.

ACES Program Consultant RFP

To support the success of the ACES Program, MassCEC seeks proposals from consultants to provide business model/use case assessment and related technical assistance services to MassCEC from proposal evaluation through the project implementation and performance monitoring and evaluation phases of the projects awarded under ACES. The Program Consultant will verify the value of the storage system's realized and non-monetizable benefits as reported by awarded ACES Program participants ("Participants").

Applicants to this RFP should read the [ACES RFP](#) to better understand the ACES Program's objectives and eligibility criteria.

3. SCOPE OF WORK

MassCEC is seeking proposals from qualified entities to support the goals of the ACES Program. Applicants will be evaluated for:

- Demonstrating an understanding of the concepts and motivators underlying the ACES RFP;

¹ See *State of Charge* pp. 105-132 for more details

- Providing a range of services that align with the tasks described below and the goals of the ACES RFP; and
- Demonstrating the ability to ensure successful completion of projects awarded under the ACES RFP.

The Program Consultant will assist MassCEC in:

1. Developing the contractual agreement with Participants (as needed);
2. Reviewing and finalizing winning proposal workplans and deliverables, including the safety aspects of the project;
3. Helping Participants maintain the goals and objectives of the ACES Program throughout the project and project monitoring duration;
4. Assisting Participants, on an as needed basis, to overcome technical-, market-, and business model- barriers;
5. Ensuring proper project performance monitoring and evaluation and verifying and analyzing project data;
6. Ensuring proper reporting and other contractual obligations are met; and
7. Compiling aggregated reports and a final report on ACES Program findings.

The Program Consultant will, at minimum, perform the below tasks and provide the associated deliverables. Applicants may propose additional relevant tasks to be completed that complement the Scope of Work outlined below.

TASKS AND DELIVERABLES

Applicants must provide a 3-page narrative to describe the manner in which they propose to perform the tasks described below (“Narrative”).

Task 1: Review documents received by MassCEC under the ACES Program

The Program Consultant shall review relevant ACES Program documents including, but not limited to, solicited proposals and awarded projects to the ACES RFP, Participant deliverables, energy interval data, and business models/use cases. The Program Consultant must:

- a. Gain a thorough understanding of the Advancing Commonwealth Energy Storage (ACES) RFP and associated application forms, and develop familiarity with the goals of the ACES Program.
- b. Assist MassCEC, as needed, in developing the contractual agreement with Participants, including providing input into the project plan, project budget, business model/use case including monetary and non-monetary benefits, performance monitoring and evaluation plan, siting, permitting, interconnection, safety, codes, standards, and regulatory aspects of the contract, and ensuring that all relevant items are incorporated in the final contract with the Participants.
- c. Work with Participants and the authorities having jurisdiction (“AHJ”) to meet a mutual understanding of relevant codes, standards, and permitting requirements for the projects.
- d. Attend meetings with MassCEC staff.

Deliverables: ACES contract reviews

Task 2: Create project reporting tools

The Program Consultant shall identify and create data collection templates for Participants that align with the project reporting requirements to MassCEC, as well as identify and/or create tools or methods for evaluating project (energy and financial) data for replicability, value of monetizable benefits, and value of non-monetizable benefits. Refer to Section 5 of the [ACES RFP](#) for more detail on reporting parameters.

The data collected from this report may in the future, as may be determined by MassCEC, be used to provide a public system database.

Deliverables: Data collection template(s), reporting tools to aggregate and display collected data

Task 3: Provide general project management

The Program Consultant will be the primary MassCEC contact for all Participants for project-related issues, and will assist MassCEC with the following for each Participant:

- a. Ensure that projects meet the relevant safety, codes, standards, siting, permitting, and regulatory requirements of the corresponding AHJs;
- b. Obtain and review all deliverables from Participant and ensure compliance with the approved project workplan, schedule, and budget;
- c. Ensure monitoring and data collection is completed by relevant project team members and in accordance with the project workplan and data reporting protocols;
- d. Perform at least two (2) site visits (with additional site visits on an as-needed basis and as approved by MassCEC) – one when the project is installed and one midway through the project’s timeline;
- e. Check in with Participant on a monthly (minimum) basis and report project status to MassCEC, including critical issues such as interconnection delays, permitting and siting challenges, etc. Content of progress reports to be determined during Program Consultant contracting; and
- f. Collect, analyze, and verify performance data from Participant.

Deliverable: Quarterly progress reports for the first year, and bi-annual reports thereafter on all projects.

Task 4: Provide aggregated reports

The Program Consultant shall provide MassCEC, at minimum, quarterly reports for the first year of system operation and bi-annual reports for the remainder of the reporting period.

Participants are required to gather and report, at minimum granularity, 15-minute interval data (unless good cause for longer interval data is presented to the Program Consultant and approved by MassCEC) to the Program Consultant for at least three (3) years from the time the project is installed and operating, and all associated analyses equations. Projects must remain at the installed site for a minimum of three (3) years. Participants shall ensure that the data is capable of being accessed remotely by the Program Consultant. The Program Consultant shall also provide anonymized aggregated data analysis, especially pertaining to the business models and use cases, and non-monetizable benefits,

to MassCEC. The Program Consultant shall acquire customer onsite data to cover and preserve the data over the period of the project to allow for analysis over the course of the project.

At the end of the three (3) year reporting period, the Program Consultant shall aggregate and analyze data from each Participant and provide a final report to MassCEC. This report shall include, at minimum, technical specifications of the systems installed, performance metrics and statistics, and economic benefits that are relevant to the use case category.

Program Consultant should include only non-confidential data and analyses in the deliverables to MassCEC.

Deliverable: Quarterly aggregated reports for the first year, bi-annual aggregated reports thereafter, and a final report.

Task 5: Summary of Program Findings

The Program Consultant shall prepare, at the end of the third year, an aggregate final summary of ACES Program findings, including, but not limited to: a summary of the results in aggregate; an analysis of the various use cases explored under the ACES Program as they relate or differ to the findings of the *State of Charge* report, including an analysis of the value provided to the distribution network; and a summary of the value of the non-monetized benefits demonstrated through the Participant projects. The Final Summary should also include market-, policy-, and regulatory- barriers and suggest possible mechanisms to overcome the barriers as appropriate.

Task 6: Miscellaneous

The Program Consultant shall complete related assignments and tasks on as as-needed basis.

4. ELIGIBILITY AND SELECTION CRITERIA

ELIGIBLE APPLICANTS

This RFP is open to all public, private, for-profit, and non-profit entities possessing the requisite experience to provide the services requested. Experience working with public agencies is preferred.

Through this RFP, MassCEC seeks to engage one (1) Program Consultant with experience in energy storage and conducting energy analyses to support the ACES Program. **No entity may be awarded under both the ACES Program and this RFP.**

Applicants may be individuals, sole proprietors, professional consultants, institutions, or companies with multiple employees. Teams of two or more of these entities are permitted to apply, with one entity designated as the lead.

Program Consultants must:

- Demonstrate thorough understanding of energy storage technologies, as well as a range of distributed energy resources which may interact with energy storage;

- Demonstrate knowledge and experience with energy storage business models and use cases;
- Demonstrate energy project management experience; and
- Demonstrate experience with energy storage technology performance monitoring and validation methodology.

Applicants must submit a proposal that meets all of the proposal requirements outlined below by **July 28th, 2017 at 4:00pm.**

SELECTION CRITERIA

Applicant proposals will be evaluated on the following criteria and must describe how they fulfil the requirements:

Section	Criteria
<p>Storage Knowledge and Experience</p>	<p>Does the Applicant have documented knowledge and/or experience in the energy storage industry, including:</p> <ol style="list-style-type: none"> 1. Knowledge of and/or experience with a variety of energy storage technologies as well as a range of distributed energy resources which may interact with energy storage; 2. Knowledge of and/or experience with a variety of energy storage applications as it pertains to different scales – commercial, industrial, residential; 3. Knowledge of and/or experience with energy storage project development, including oversight of installation; 4. Knowledge of and/or experience in storage and renewable energy integration; 5. Knowledge of and/or experience with a diversity of energy storage use models and business cases; 6. Knowledge of and/or experience with the full suite of monetary, including incentives, tax credits, etc, and non-monetary benefits of an energy storage system; 7. Knowledge of the current energy storage equipment market and the solar PV equipment market, and other factors affecting installation prices, including site specific design factors, or structural or electrical upgrades; 8. Knowledge of and/or experience with energy storage safety, equipment- and building- codes, standards, and related training; 9. Knowledge of and/or experience in site considerations and managing the permitting, interconnection, and other related processes; and 10. Knowledge of and experience with energy analytics, including energy storage performance monitoring and validation.
<p>Consultant Qualifications</p>	<ol style="list-style-type: none"> 1. Does the Applicant demonstrate strong communication and interpersonal skills which would enable the Applicant

	<p>to communicate program goals, deadlines, and expectations with ACES project teams?</p> <ol style="list-style-type: none"> 2. What is the quality of the Applicant’s performance on similar past consulting assignments or their achievements related to proposed work? How were their efforts evaluated? How were some obstacles addressed? 3. What is the Applicant’s plan for acquiring technical knowledge that it may not have in-house? 4. Has the Applicant demonstrated previous successful performance under MassCEC contracts? 5. Has the Applicant provided strong references and recommendations?
Value Demonstration	<ol style="list-style-type: none"> 1. Is the Applicant’s proposal cost-competitive? 2. Has the Applicant demonstrated sufficient time resources and flexibility to participate in the ACES Program?

SECURITY POLICY

The selected Program Consultant must maintain a security policy to protect and limit access to any project host or assigned project related confidential information. The Program Consultant should apply high standards of operational security to protect personal and confidential information from theft, loss, misuse, destruction or alteration.

ANTICIPATED TERM OF CONTRACT

A final contract is subject to successful negotiation of a final budget and scope of services. MassCEC’s selection of a Program Consultant pursuant to this RFP does not mean that MassCEC accepts all aspects of the proposal, modifications to which may be requested and agreed to during contract negotiations. It is anticipated that the contract will commence in or about October 2017 and continue for the duration of the ACES Program.

The ACES Program will make awards on or about September 8th, 2017, after which the ACES Program contracting process will commence. Once projects are contracted, they must be constructed within eighteen (18) months. Following commissioning, performance monitoring and evaluation for each awarded project will be required for a minimum of three (3) years. Therefore, it is expected that the anticipated term of the contract for the Program Consultant to be approximately fifty-four (54) months.

The contract will be reviewed during its course and may be modified and/or extended at the sole discretion of MassCEC.

CONFLICT OF INTEREST

By submitting a response to this RFP, the Applicant acknowledges that, if awarded, the individual(s) and all related parties submitting the proposal will not be eligible to participate in the ACES Program as a project grant recipient. In addition, the individual(s) may not have any current business or contractual agreements with ACES applicants that may be receiving awards under the ACES Program. The awarded Applicant will be required to attest to this in contract.

The Applicant also agrees to disclose any and all conflicts of interest between the Applicant and any ACES Participant within the last ten (10) years, any current discussions and/or projects, and any future discussions and/or projects. Applicants acknowledge that they will be asked to sign a letter of affirmation regarding all existing and potential conflicts, and that they will also be asked to execute a non-disclosure agreement with all ACES Participants.

5. HOW TO APPLY AND REQUIRED APPLICATION COMPONENTS

PROPOSAL REQUIREMENTS

Proposals must be no more than **ten (10) pages** (suggested page lengths indicated below), and must contain the following:

Proposal Cover Letter (does not count against page limit)

Narrative (3): Applicants should provide a proposed approach for working with MassCEC.

Statement of Qualifications (2): All responses must include a statement of qualifications, experience, and description of the individual or Applicant firm and relevant background/history. The response should respond specifically to the requirement specified under the Selection Criteria above and provide a plan for how the Applicant will obtain any necessary third party technical support services.

Staff Qualifications (1): All responses must include a written description of each individual's technology evaluation experience as well as a resume of each individual who will be providing technical services and each individual who will be providing business model and use case analyses (resumes do not count against the proposal page limit, but please consider the relevance of included materials)².

References (1): All responses must include references from at least three (3) clients of the Applicant, and preferably clients who have utilized the Applicant on matters related to the proposed technical and business model/use case services. These references must include a contact person, a full address, and a phone number.

Project Schedule (2): All responses must include an estimated project schedule which lays out all project milestones and length or date of completion. Applicants should consider the timeline outlined in the ACES RFP.

Budget and Rate Sheet (1): Responses must include a detailed budget, including information on rates of all team members working on the project. Rates for travel should also be included and may not exceed half the consultant's usual hourly rate. Budgets should be broken out by task and service provided.

² MassCEC reserves the right to investigate and review the technical experience and background of any or all personnel assigned to work under an agreement for services, and based on such investigations, to reject the use of any persons within MassCEC's discretion. Any changes to personnel require formal written approval by MassCEC, and MassCEC reserves the right to terminate an agreement for services if changes are not approved.

Where Applicants anticipate using outside expertise for a task, the Applicant should include estimated rates. All items should be based on a per project basis and aggregated over 5, 10, 15, and 20 projects.

Attachment A: Completed Signature and Acceptance Form

Attachment B: Sample MassCEC Agreement for Services

BUDGET REQUIREMENTS

Program Consultants will be paid by the hour for the time spent assisting MassCEC and its Participants under the ACES Program.

SUBMITTING APPLICATION MATERIALS

It is the sole responsibility of the Applicant to ensure that this Application is complete and properly submitted, including all necessary attachments, letters or other supporting documentation. At its sole discretion, MassCEC may request supplemental materials from the Applicant and such materials must be submitted within 10 days of the request or the Application may be rejected without further review.

Responses to this RFP must be received by MassCEC no later than **4:00pm on July 28th, 2017**. Only complete and timely proposals will be considered. MassCEC, at its sole discretion, may determine whether an application is complete.

The submission must be in electronic form, including a scanned *Signature and Acceptance Form* (Attachment A), submitted via email to energystorage@masscec.com. **“ACES Program Consultant RFP”** must appear in the subject line.

QUESTIONS

Please submit all questions in writing to energystorage@masscec.com no later than **4:00pm on June 23rd, 2017**. **“ACES Program Consultant RFP”** must appear in the subject line. Questions and responses will be posted to the [RFP webpage](#) shortly after this deadline.

ESTIMATED TIMELINE

The estimated timeline below is subject to change at MassCEC’s discretion.

RFP Released	June 1, 2017
ACES Program Webinar	June 9, 2017, 11:00am – 12:00pm
Deadline for Written Questions	June 23, 2017 at 4:00pm
Proposals Due to MassCEC	July 28, 2017 at 4:00pm
Announcement of Selected Firm	August 31, 2017

6. GENERAL RFP CONDITIONS

NOTICE OF PUBLIC DISCLOSURE

General Statement

As a public entity, MassCEC is subject to Massachusetts' Public Records Law, codified at Chapter 66 of the Massachusetts General Laws. Thus, any documentary material, data, or other information received by MassCEC from an applicant is a public record subject to disclosure. Applicant acknowledges and agrees that MassCEC, in its sole discretion, shall determine whether any particular document, material, data or other information is exempt from or subject to public disclosure. **Applicant agrees and acknowledges that it shall not send MassCEC any confidential or sensitive information under this RFP.**

CONTRACTUAL REQUIREMENTS

Upon MassCEC's authorization to proceed with the proposal, MassCEC and the selected Program Consultant will execute a contract which will set forth the respective roles and responsibilities of the parties. In addition, the contract to be entered into between MassCEC and a selected Program Consultant will address maintaining the confidentiality of any proprietary information that the Program Consultant may provide MassCEC, subject in all cases to the same limitations set forth in the Notice of Public Disclosure, above.

WAIVER AUTHORITY

MassCEC reserves the right, at its sole discretion, to waive minor irregularities in submittal requirements, to modify the anticipated timeline, to request modifications of the Application, to accept or reject any or all Applications received, and/or to cancel all or part of this RFP at any time prior to awards.

DISCLAIMER

This RFP does not commit MassCEC to award any funds, pay any costs incurred in preparing an application, or procure or contract for services or supplies. MassCEC reserves the right to accept or reject any or all applications received, negotiate with all qualified applicants, cancel or modify the RFP in part or in its entirety, or change the application guidelines.

This RFP has been distributed electronically using MassCEC's website. It is the responsibility of applicants to check the website for any addenda or modifications to a RFP to which they intend to respond. MassCEC accepts no liability and will provide no accommodation to applicants who submit an application based on an out-of-date RFP document.