

**State of Maine  
Master Score Sheet**

RFP# 202402045					
Energy Burden Study					
<b>Bidder Name:</b>		<b>Applied Economics Clinic</b>	<b>Collins CEA</b>	<b>Exeter Associates, Inc.</b>	<b>London Economics International LLC</b>
<b>Proposed Cost:</b>		<b>\$50,000</b>	<b>\$40,590</b>	<b>\$49,650</b>	<b>\$66,145</b>
<b>Scoring Sections</b>	<b>Points Available</b>				
Section I: Preliminary Information	N/A				
Section II: Organization Qualifications and Experience	40	<b>33</b>	<b>20</b>	<b>30</b>	<b>25</b>
Section III: Proposed Services	30	<b>20</b>	<b>20</b>	<b>27</b>	<b>20</b>
Section IV: Cost Proposal	30	<b>23.4</b>	<b>28.8</b>	<b>23.7</b>	<b>17.7</b>
<b>TOTAL</b>	<b><u>100</u></b>	<b><u>76.4</u></b>	<b><u>68.8</u></b>	<b><u>80.7</u></b>	<b><u>62.7</u></b>
<b>Bidder Name:</b>		<b>PMG Consulting, LLC</b>	<b>Resource Refocus LLC</b>	<b>Vermont Energy Investment Corporation (VEIC)</b>	
<b>Proposed Cost:</b>		<b>\$48,000</b>	<b>\$39,000</b>	<b>\$55,845</b>	
<b>Scoring Sections</b>	<b>Points Available</b>				
Section I: Preliminary Information	N/A				
Section II: Organization Qualifications and Experience	40	<b>25</b>	<b>27</b>	<b>38</b>	
Section III: Proposed Services	30	<b>18</b>	<b>18</b>	<b>30</b>	
Section IV: Cost Proposal	30	<b>24.3</b>	<b>30</b>	<b>21</b>	
<b>TOTAL</b>	<b><u>100</u></b>	<b><u>67.3</u></b>	<b><u>75</u></b>	<b><u>89</u></b>	

**Award Justification Statement**  
**RFP# 202402045: Energy Burden Study**

**I. Summary**

The request was sought proposals for the preparation of an Energy Burden Study that will quantify the percentage of income that Maine residents pay for energy, including breakdowns of such information by income level, fuel type, and geographic region of the State of Maine. The Office previously conducted a similar study in 2019. The prior study has been relied upon by State policymakers in developing energy policies and low income support policies affecting residential utility customers, and the OPA has used it in conjunction with its advocacy on behalf of such customers before the Legislature, the PUC, and regional forums

**II. Evaluation Process**

The evaluators consisted of the Deputy Public Advocate, a Senior Attorney with advocacy experience relating to low income regulations and legislation, and the Consumer Advisor, who assists customers with concerns about rates and billing. The evaluators reviewed the proposal independently based upon the qualification and experience, the proposed services, and the work plan presented by seven bidders. The evaluators met to develop a consensus regarding how well each bidder individually satisfied these requirements and to establish a consensus score.

**III. Qualifications & Experience**

All 7 bidders appeared to possess the minimum qualifications to prepare the requested study, although their experience in performing directly comparable work varied significantly.

The winning bidder's proposal included the following advantages:

- The winning bidder has prepared extremely similar studies for the state of Vermont, Connecticut, and New Hampshire, and is currently preparing one for the State of Wisconsin.
- The winning bidder has performed related services for other agencies of the State of Maine, including Efficiency Maine Trust.
- The winning bidder is using a subcontractor based in Maine who possesses significant experience in conducting the type primary research that may be required to complete the study effectively, as well as to perform the required data analysis.

- The other professional staff of the winning bidder is based in Vermont and Maine, which will facilitate in person meetings.

#### **IV. Proposed Services**

All 7 bidders proposed services consistent with those requested in the RFP, although the detail presented varied significantly.

The winning bidder's proposal included the following advantages:

- The winning bidder presented a detailed plan regarding how research, including primary research, would be conducted.
- The winning bidder presented a detailed work plan and timeline to demonstrate how it would meet the requested completion date.
- The winning bidder presented sample visualizations/infographics that demonstrated how the results of its analysis would be presented in a manner that would be most helpful to those who might rely on it, including the OPA, the Legislature, the PUC, and other stakeholders.
- The proposal included elements beyond those requested, including the development of interactive maps and proposals regarding how to reduce energy burden for Maine customers.

#### **V. Cost Proposal**

The cost proposals were all within a relatively narrow band. The winning bidder's cost proposal was in the middle range of proposals received.

#### **VI. Conclusion**

Out of 100 possible points, the Evaluation Team awarded Vermont Energy Investment Corporation (VEIC) a score of 89. The strengths of Vermont Energy Investment Corporation (VEIC)'s proposal outweighed the other bidders through both its qualifications and experience, including previous preparation of similar studies in other jurisdictions, and its detailed work plan for delivering the requested study. The Evaluation Team has determined the proposal submitted by Vermont Energy Investment Corporation (VEIC) represents the best value to the State of Maine.



**STATE OF MAINE  
OFFICE OF THE PUBLIC ADVOCATE**

**William S. Harwood  
Public Advocate**

**Janet T. Mills  
Governor**

**AWARD NOTIFICATION LETTER**

April 18, 2024

Via email: [tanya.stasio@aeclinic.org](mailto:tanya.stasio@aeclinic.org)

Tanya Stasio, Researcher  
Applied Economics Clinic  
6 Liberty Sq., PMB 98162  
Boston, MA 02109

**SUBJECT:** Notice of Conditional Contract Award under RFP # 202402045,  
Energy Burden Study

Dear Ms. Stasio:

This letter is regarding the subject Request for Proposals (RFP), issued by the State of Maine Office of the Public Advocate for Energy Burden 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:

- Vermont Energy Investment Corporation (VEIC)

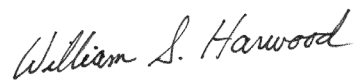
The bidder listed above received the evaluation team's highest ranking. The Department will be contacting the aforementioned bidder soon to negotiate a contract. As provided in the RFP, the Notice of Conditional Contract Award is subject to execution of a written contract and, as a result, this Notice 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 cursive script that reads "William S. Harwood".

William S. Harwood  
Maine Public Advocate  
State House Station 112  
Augusta, ME 04333-0112

## **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, Division of Purchases, Chapter 120, § (2) (2).



**STATE OF MAINE  
OFFICE OF THE PUBLIC ADVOCATE**

**William S. Harwood  
Public Advocate**

**Janet T. Mills  
Governor**

**AWARD NOTIFICATION LETTER**

April 18, 2024

Via email: [nick@collinscea.com](mailto:nick@collinscea.com)

Nick Collins, Principal  
CollinsCEA  
30 Hillside Drive  
New Gloucester, ME 04260

**SUBJECT:** Notice of Conditional Contract Award under RFP # 202402045,  
Energy Burden Study

Dear Mr. Collins:

This letter is regarding the subject Request for Proposals (RFP), issued by the State of Maine Office of the Public Advocate for Energy Burden 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  
OFFICE OF THE PUBLIC ADVOCATE**

**William S. Harwood  
Public Advocate**

**Janet T. Mills  
Governor**

**AWARD NOTIFICATION LETTER**

April 18, 2024

Via email: [mhoyt@exeterassociates.com](mailto:mhoyt@exeterassociates.com)

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

**SUBJECT:** Notice of Conditional Contract Award under RFP # 202402045,  
Energy Burden Study

Dear Mr. Hoyt:

This letter is regarding the subject Request for Proposals (RFP), issued by the State of Maine Office of the Public Advocate for Energy Burden 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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Sincerely,

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William S. Harwood  
Maine Public Advocate  
State House Station 112  
Augusta, ME 04333-0112

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**STATE OF MAINE  
OFFICE OF THE PUBLIC ADVOCATE**

**William S. Harwood  
Public Advocate**

**Janet T. Mills  
Governor**

**AWARD NOTIFICATION LETTER**

April 18, 2024

Via email: [cherrylin@londoneconomics.com](mailto:cherrylin@londoneconomics.com)

Cherrylin Trinidad  
London Economics International LLC  
717 Atlantic Ave, Suite 1A  
Boston, MA 02111

**SUBJECT:** Notice of Conditional Contract Award under RFP # 202402045,  
Energy Burden Study

Dear Ms. Trinidad:

This letter is regarding the subject Request for Proposals (RFP), issued by the State of Maine Office of the Public Advocate for Energy Burden 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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William S. Harwood  
Maine Public Advocate  
State House Station 112  
Augusta, ME 04333-0112

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**STATE OF MAINE  
OFFICE OF THE PUBLIC ADVOCATE**

**William S. Harwood  
Public Advocate**

**Janet T. Mills  
Governor**

**AWARD NOTIFICATION LETTER**

April 18, 2024

Via email: [Susan.Mangus@pmgconsults.com](mailto:Susan.Mangus@pmgconsults.com)

Susan Mangus  
PMG Consulting, LLC  
550 Congressional Blvd  
Carmel, IN 46032

**SUBJECT:** Notice of Conditional Contract Award under RFP # 202402045,  
Energy Burden Study

Dear Ms. Mangus:

This letter is regarding the subject Request for Proposals (RFP), issued by the State of Maine Office of the Public Advocate for Energy Burden 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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Sincerely,

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William S. Harwood  
Maine Public Advocate  
State House Station 112  
Augusta, ME 04333-0112

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**STATE OF MAINE  
OFFICE OF THE PUBLIC ADVOCATE**

**William S. Harwood  
Public Advocate**

**Janet T. Mills  
Governor**

**AWARD NOTIFICATION LETTER**

April 18, 2024

*Via email: [carrie@resourcerefocus.com](mailto:carrie@resourcerefocus.com)*

Dr. Carrie Brown, Director  
Resource Refocus LLC  
221 Mountain Ave  
Piedmont, CA 94611

**SUBJECT:** Notice of Conditional Contract Award under RFP # 202402045,  
Energy Burden Study

Dear Dr. Brown:

This letter is regarding the subject Request for Proposals (RFP), issued by the State of Maine Office of the Public Advocate for Energy Burden 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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Maine Public Advocate  
State House Station 112  
Augusta, ME 04333-0112

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**STATE OF MAINE  
OFFICE OF THE PUBLIC ADVOCATE**

**William S. Harwood  
Public Advocate**

**Janet T. Mills  
Governor**

**AWARD NOTIFICATION LETTER**

April 18, 2024

Via email: [jsears@veic.org](mailto:jsears@veic.org)

Justine Sears  
Vermont Energy Investment Corporation  
20 Winooski Falls Way, 5<sup>th</sup> Floor  
Winooski, VT 05404

**SUBJECT:** Notice of Conditional Contract Award under RFP # 202402045,  
Energy Burden Study

Dear Ms. Sears:

This letter is regarding the subject Request for Proposals (RFP), issued by the State of Maine Office of the Public Advocate for Energy Burden 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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Maine Public Advocate  
State House Station 112  
Augusta, ME 04333-0112

## **STATEMENT OF APPEAL RIGHTS**

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**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** Applied Economics Clinic  
**DATE:** March 28, 2024

**SUMMARY PAGE**

**Department Name:** Office of the Public Advocate  
**Name of RFP Coordinator:** Andrew Landry  
**Names of Evaluators:** Andrew Landry, Kristina Winther, Elizabeth Deprey

<b><u>Pass/Fail Criteria</u></b>	<b><u>Pass</u></b>	<b><u>Fail</u></b>
Section I. Preliminary Information (Eligibility)		
• NA		
<b><u>Scoring Sections</u></b>	<b><u>Points Available</u></b>	<b><u>Points Awarded</u></b>
Section II. Organization Qualifications and Experience	<b>40</b>	<b>33</b>
Section III. Proposed Services	<b>30</b>	<b>20</b>
Section IV. Cost Proposal	<b>30</b>	<b>23.4</b>
<b><u>Total Points</u></b>	<b><u>100</u></b>	<b><u>76.4</u></b>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER:** Applied Economics Clinic

**DATE:** March 28, 2024

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

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**Evaluation Team Comments:**

Provided

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER:** Applied Economics Clinic

**DATE:** March 28, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>40</b>	<b>33</b>

**Evaluation Team Comments:**

- I. Overview of the Organization
  - Overview of Organization
    - Based in Boston
    - Consulting practice is focused on “energy, environment, consumer protection, and equity”
    - Bidder has done previous work for Maine Governor’s Energy Office. The report, entitled State of Maine Renewable Energy Goals Market Assessment for the in 2021, is clear and well-formatted for readability.
    - Bidder has limited experience in performing work similar to the study requested by the RFP
    - Sample project 1 related to assessing the equity impacts of various options for meeting Maine’s renewable targets. Equity element is relevant but not directly comparable to the requested scope of work in RFP
    - Similarly, sample projects 2 and 3 included an equity elements, which is relevant, but neither was directly comparable to the requested work in the RFP
    - The bidder’s website, a link to which was provided in the bid, included a reference to the study “New England Housing Costs: Rent as a Share of Income” performed by the bidder is more similar to the work requested by the RFP. However, the report lacks the demographic breakdowns and is not comprehensive.
    - Bidder has experience in energy data analysis including collecting, organizing, and analyzing data from the U.S. Energy Information Administration, U.S. Department of Energy, U.S. Census American Community Survey
- II. Subcontractors
  - i. NA
- III. Organizational Chart
  - i. Org chart provided shows Senior Economist, Researcher, and unknown number of Assistant Researchers and Research Assistants.
  - ii. Write up states 15 staff members (no indication on org chart as to the number of staff, but write-up)

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER:** Applied Economics Clinic

**DATE:** March 28, 2024

IV. Etc.

- i. Bidder provides applied, on-the-job learning experiences to graduate students
- ii. Bidder is a non-profit specializing on energy, env., consumer protection and equity

V. Litigation

- None

VI. Financial Viability

- NA

VII. Certificate of Insurances

- Provided

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER:** Applied Economics Clinic

**DATE:** March 28, 2024

**EVALUATION OF SECTION III  
Proposed Services**

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

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**Evaluation Team Comments:**

A. Services to be Provided

- The Bid meets the minimum requirements set forth in RFP
- The Bid addresses approaches for primary and secondary research collection
- The Bid proposes two written memos: Energy and Equity Analysis using secondary sources and Energy Burden Analysis using primary sources; findings to be combined into final product report

B. Implementation – Work Plan

- Detailed work plan includes tasks and timelines
- The implementation steps seem vague

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** Applied Economics Clinic  
**DATE:** March 28, 2024

**EVALUATION OF SECTION IV  
Cost Proposal**

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Lowest Submitted Cost Proposal	>	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$39,000</b>	>	<b>\$50,000</b>	<b>x</b>	<b>30 points</b>	<b>=</b>	<b>23.4</b>

**Evaluation Team Comments:**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** CollinsCEA  
**DATE:** March 28, 2024

**SUMMARY PAGE**

**Department Name:** Office of the Public Advocate  
**Name of RFP Coordinator:** Andrew Landry  
**Names of Evaluators:** Andrew Landry, Kristina Winther, Elizabeth Deprey

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• NA		
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>40</b>	<b>20</b>
Section III. Proposed Services	<b>30</b>	<b>20</b>
Section IV. Cost Proposal	<b>30</b>	<b>28.8</b>
<u>Total Points</u>	<u>100</u>	<u>68.8</u>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** CollinsCEA  
**DATE:** March 28, 2024

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

---

**Evaluation Team Comments:**

Provided



**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** CollinsCEA  
**DATE:** March 28, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>40</b>	<b>20</b>

**Evaluation Team Comments:**

- I. Overview of Organization
  - Based in Maine
  - Senior consultant is an engineer.
  - Strong experience with data bases
  - Project coordinator has experience in social work. Could be helpful.
  - Sample projects are focused on measuring energy use
  - Organization’s focus appears to be on technical/engineering type analyses
  - Has worked with Efficiency Maine Trust for 15 years, currently working with Bureau of General Services as Maine’s Energy Manager
  - Appears to be familiar with Maine’s primary and secondary data sources
- II. Subcontractors
  - NA
- III. Organizational Chart
  - 2 professionals – principal and project manager - small
- IV. Litigation
  - None
- V. Financial Viability
  - NA
- VI. Certificate of Insurances
  - Provided

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** CollinsCEA  
**DATE:** March 28, 2024

**EVALUATION OF SECTION III  
Proposed Services**

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

---

**Evaluation Team Comments:**

A. Services to be Provided

- The Bid meets the minimum requirements set forth in RFP Provides detailed discussion of approach to major tasks
- The Bid addresses potential challenges of primary data collection
- The Bid Proposes to expand scope to consider energy burden change over time

B. Implementation – Work Plan

- The Bid includes a high level timeline and high level list of tasks, shown in a chart with dates
- The Bid lists staff assignments
- Overall, very detailed, clear steps and proposed partners to collect Maine-based data from
- The Bid states that the Bidder does not believe the timeline is adequate to allow for proper primary data collection
- The Bid proposed the use of data visualization with Microsoft Power BI

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** CollinsCEA  
**DATE:** March 28, 2024

**EVALUATION OF SECTION IV  
Cost Proposal**

---

Lowest Submitted Cost Proposal	>	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$39,000</b>	>	<b>\$40,590</b>	<b>x</b>	<b>30 points</b>	<b>=</b>	<b>28.8</b>

**Evaluation Team Comments:**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** Exeter Associates, Inc.  
**DATE:** March 28, 2024

**SUMMARY PAGE**

**Department Name:** Office of the Public Advocate  
**Name of RFP Coordinator:** Andrew Landry  
**Names of Evaluators:** Andrew Landry, Kristina Winther, Elizabeth Deprey

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• NA		
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>40</b>	<b>30</b>
Section III. Proposed Services	<b>30</b>	<b>27</b>
Section IV. Cost Proposal	<b>30</b>	<b>23.7</b>
<u>Total Points</u>	<u>100</u>	<u>80.7</u>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** Exeter Associates, Inc.  
**DATE:** March 28, 2024

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

---

**Evaluation Team Comments:**

Provided

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** Exeter Associates, Inc.  
**DATE:** March 28, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>40</b>	<b>30</b>

**Evaluation Team Comments:**

- I. Overview of the Organization
  - Large organization, based in Maryland
  - Prior work experience in Maine and for the OPA, as well as in New Hampshire and Massachusetts
  - Significant experience with analysis of data bases
  - Stated experience with data sets related to energy burden
  - Sample projects were generally related to the topic of energy burden but were not directly analogous to the requested study
  - Sample projects includes an energy burden analysis as part of RPS policy assessment, a review of the impacts of electrification on household-level customer outcomes, and review of policy initiatives that influence residential customer energy burden”
  - Performed “comprehensive” assessments of energy consumption and costs on behalf of State of Maryland
  - Experience developing dynamic and visually appealing analysis, as applicable to the proposed interactive web-browser tool
  
- II. Subcontractors
  - NA
- III. Organizational Chart
  - Org chart shows 16 professionals plus support staff
  - Three staff proposed to carry out project: a Principal, a Senior Economist as Project Manager, and a research assistant/ alternative Project Manager
  - Senior economist has experience in energy, utilities, social programs
  - Research assistant has experience with econometric analysis, SNAP
- IV. Litigation
  - None
- V. Financial Viability
  - NA
- VI. Certificate of Insurances
  - Provided

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** Exeter Associates, Inc.  
**DATE:** March 28, 2024

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>30</b>	<b>27</b>

**Evaluation Team Comments:**

A. Services to be Provided

- Proposal addresses minimum requirements sought requested in RFP
- Proposal includes detailed discussion of data categories
- Proposal includes detailed discussion of potential data sources
- Proposal includes detailed discussion of similar studies performed recently in other states
- Proposal includes detailed discussion of how to improve on the OPA's 2019 Study
- Proposal includes detailed discussion of data platform to be used
- Bid proposes to create a detailed written report and an interactive, public-facing web tool
- Proposal demonstrates that the Bidder has given substantial thought into how it would conduct the necessary research and prepare the requested study

B. Implementation – Work Plan

- A detailed and clear timeline is provided for 12 identified individual tasks
- A plan is presented for delegating and managing tasks
- The Proposal outlines data and source needed to expand from the last Energy Burden Study to what this RFP includes
- The Proposal suggest the use of housing stock characteristics as well as other data sources not outlined in the RFP

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** Exeter Associates, Inc.  
**DATE:** March 28, 2024

**EVALUATION OF SECTION IV  
Cost Proposal**

---

Lowest Submitted Cost Proposal	>	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$39,000</b>	>	<b>\$49,650</b>	<b>x</b>	<b>30 points</b>	<b>=</b>	<b>23.7</b>

**Evaluation Team Comments:**



**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** London Economics International LLC  
**DATE:** March 28, 2024

**SUMMARY PAGE**

**Department Name:** Office of the Public Advocate  
**Name of RFP Coordinator:** Andrew Landry  
**Names of Evaluators:** Andrew Landry, Kristina Winther, Elizabeth Deprey

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• NA		
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>40</b>	<b>25</b>
Section III. Proposed Services	<b>30</b>	<b>20</b>
Section IV. Cost Proposal	<b>30</b>	<b>17.7</b>
<u>Total Points</u>	<u>100</u>	<u>62.7</u>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER:** London Economics International LLC

**DATE:** March 28, 2024

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

---

**Evaluation Team Comments:**

Provided

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER:** London Economics International LLC

**DATE:** March 28, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>40</b>	<b>25</b>

**Evaluation Team Comments:**

- I. Overview of the Organization
  - Based in Boston
  - Previous work in Maine for OPA and PUC
  - Strong data base and computer analysis capabilities
  - None of the sample projects provide are closely related to the services sought
  - Samples include benefit cost analyses for Maine’s Net Energy Billing program project 1 is Maine OPA NEB BCA analysis, and the Maine public power proposal, and an analysis of the impact of rates on
    - industrial customers
    - Overview references Kansas and ratemaking work and experience in New Jersey and PJM issues, neither of which is directly relevant
- II. Subcontractors
  - NA
- III. Organizational Chart
  - Org Chart proposes four professionals on project - senior advisor, project manager and support staff
  - Large organization
- IV. Litigation
  - None
- V. Financial Viability
  - NA
- VI. Certificate of Insurances
  - Provided
- VII. Etc.
  - NA

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER:** London Economics International LLC

**DATE:** March 28, 2024

**EVALUATION OF SECTION III  
Proposed Services**

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

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**Evaluation Team Comments:**

A. Services to be Provided

- Proposed services cover minimum requested in the RFP
- Limited detail regarding services or methodology
- Proposes creating customer prototypes based on income and location to drive estimates of fuel and electricity usage
- Proposes primary research through surveys and interviews in addition to the use of publicly available data

B. Implementation – Work Plan

- Timeline provide for 8 identified tasks through a bar chart
- Does not include significant detail but includes the basics outlined in the RFP

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER:** London Economics International LLC

**DATE:** March 28, 2024

**EVALUATION OF SECTION IV  
Cost Proposal**

---

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$39,000</b>	,	<b>\$66,145</b>	<b>x</b>	<b>30 points</b>	<b>=</b>	<b>17.7</b>

**Evaluation Team Comments:**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** PMG Consulting, LLC  
**DATE:** March 28, 2024

**SUMMARY PAGE**

**Department Name:** Office of the Public Advocate  
**Name of RFP Coordinator:** Andrew Landry  
**Names of Evaluators:** Andrew Landry, Kristina Winther, Elizabeth Deprey

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• NA		
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>40</b>	<b>25</b>
Section III. Proposed Services	<b>30</b>	<b>18</b>
Section IV. Cost Proposal	<b>30</b>	<b>24.3</b>
<u>Total Points</u>	<u>100</u>	<u>67.3</u>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** PMG Consulting, LLC  
**DATE:** March 28, 2024

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

---

**Evaluation Team Comments:**

Provided

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** PMG Consulting, LLC  
**DATE:** March 28, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>40</b>	<b>25</b>

**Evaluation Team Comments:**

- I. Overview of Organization
  - Virginia based
  - Disabled Veteran-owned
  - Specializes in utility regulation and finance, and cybersecurity
  - Strong computer and statistical capabilities
  - 2 of 3 sample projects related to utility ratemaking, which is not directly relevant
  - 3<sup>rd</sup> sample related to analytical support for CPCN, also not directly relevant
  - No sample project similar to requested services
  
- II. Subcontractors
  - NA
- III. Organizational Chart
  - Four professionals
  - CEO, Lead Case Manager, Expert in Utility Regulations and Senior Researcher
- II. Etc. – Submission errors:
  - Appendix A is a duplicate of Appendix B
  - Appendix C references a different RFP#
- I. Litigation
  - None
- II. Financial Viability
  - NA
- III. Certificate of Insurances
  - Provided



**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** PMG Consulting, LLC  
**DATE:** March 28, 2024

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>30</b>	<b>18</b>

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**Evaluation Team Comments:**

A. Services to be Provided

- Proposed services reflect those requested in RFP
- Proposes to create a national, regional and state dataset
- Proposed analysis based on income, housing type, tenure status, race, ethnicity, and age of occupant
- Lacks detail – Proposal is primarily a restatement of RFP

B. Implementation – Work Plan

- Work plan lacked any significant detail
- No timeline or tasks
- No discussion of method of data collection
- Not heavy detailed, three bullets – create schedule with our office, share drafts of “all written materials.” Then “Assist the Office in proposing reasonable schedules and deadlines to the MPUC for each stage of the proceedings

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** PMG Consulting, LLC  
**DATE:** March 28, 2024

**EVALUATION OF SECTION IV  
Cost Proposal**

---

Lowest Submitted Cost Proposal	>	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$39,000</b>	>	<b>\$48,000</b>	<b>x</b>	<b>30 points</b>	<b>=</b>	<b>24.3</b>

**Evaluation Team Comments:**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** Resource Refocus LLC  
**DATE:** March 28, 2024

**SUMMARY PAGE**

**Department Name:** Office of the Public Advocate  
**Name of RFP Coordinator:** Andrew Landry  
**Names of Evaluators:** Andrew Landry, Kristina Winther, Elizabeth Deprey

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• NA		
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>40</b>	<b>27</b>
Section III. Proposed Services	<b>30</b>	<b>18</b>
Section IV. Cost Proposal	<b>30</b>	<b>30</b>
<u>Total Points</u>	<u>100</u>	<u>75</u>

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** Resource Refocus LLC  
**DATE:** March 28, 2024

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

---

**Evaluation Team Comments:**

Provided

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** Resource Refocus LLC  
**DATE:** March 28, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>40</b>	<b>27</b>

**Evaluation Team Comments:**

- I. Overview of the Organization
  - Based in California
  - Women-owned
  - Emphasize experience in building performance analysis
  - Sample projects focus on building information, including a decarbonization analysis of buildings, residential codes research, and building scale energy and utility management strategies
  - Experience in large scale data analysis, regression-based and inverse parameter modeling, building performance simulation, billing analysis, and statistical techniques
- II. Subcontractors
  - NA
- III. Organizational Chart
  - 7 employees involved in project - principal, business operations manager, project manager and 4 consultants,
  - 2 devoted to data visualization
- IV. Litigation
  - None
- V. Financial Viability
  - NA
- VI. Certificate of Insurances
  - Provided

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** Resource Refocus LLC  
**DATE:** March 28, 2024

**EVALUATION OF SECTION III  
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	<b>30</b>	<b>18</b>

**Evaluation Team Comments:**

A. Services to be Provided

- Proposes using building type approach
- Recommends using the National Renewable Energy Lab’s (NREL) ResStock tool to collect and aggregate granular household energy expenditure, income, and energy burden information
- Believes primary research is infeasible for budget
- Open-source modeling tool that represents the US building stock (based on more than 20 million simulations), 2018 data
- Resource for state and local decision makers considering options for energy retrofits for their housing stock to reduce carbon emissions, energy use, and/or utility bills
- Does not include household transportation expenditures, electric or otherwise
- Consultant would supplement ResStock data with secondary sources

B. Implementation – Work Plan

- Provides detailed schedule provided for 7 major tasks that meets the requested deadlines
- Provides general overview of data collection and analyses tasks
- Proposed deliverable is a clearly written and reader-friendly report
- Proposes addressing potential retrofits to housing stock, which is beyond the scope of the requested services

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045  
**RFP TITLE:** Energy Burden Study  
**BIDDER:** Resource Refocus LLC  
**DATE:** March 28, 2024

**EVALUATION OF SECTION IV  
Cost Proposal**

---

Lowest Submitted Cost Proposal	>	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$39,000</b>	>	<b>\$39,000</b>	<b>x</b>	<b>30 points</b>	<b>=</b>	<b>30</b>

**Evaluation Team Comments:**

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER:** Vermont Energy Investment Corporation (VEIC)

**DATE:** March 28, 2024

**SUMMARY PAGE**

**Department Name:** Office of the Public Advocate

**Name of RFP Coordinator:** Andrew Landry

**Names of Evaluators:** Andrew Landry, Kristina Winther, Elizabeth Deprey

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• NA		
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>40</b>	<b>38</b>
Section III. Proposed Services	<b>30</b>	<b>30</b>
Section IV. Cost Proposal	<b>30</b>	<b>21</b>
<u>Total Points</u>	<u>100</u>	<u>89</u>



**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER:** Vermont Energy Investment Corporation (VEIC)

**DATE:** March 28, 2024

**OVERVIEW OF SECTION I  
Preliminary Information**

Section I. Preliminary Information

---

**Evaluation Team Comments:**

Provided

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER:** Vermont Energy Investment Corporation (VEIC)

**DATE:** March 28, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	<b>40</b>	<b>38</b>

**Evaluation Team Comments:**

I. Overview of the Organization

- Vermont based
- Experience in Maine
- Direct experience conducting the type of energy burden analyses such as that sought in the RFP
- Understands the metrics and data that are required for a comprehensive picture of energy affordability
- Sample project 1, as operator of Efficiency Vermont, in 2016 led that state's first energy burden analysis to understand better how to reach low-income Vermonters by examining energy costs relative to income through census block group and zip code, updated in 2019 and 2023
- Sample project 2, in Connecticut analyzed geographic patterns in the affordability of energy, housing, transportation, and water. Using publicly available datasets for each category, VEIC estimated household spending and total cost burden as well as combined spending on housing and transportation.
- Currently performing an energy burden study for the State of Wisconsin
- Expertise in energy efficiency, building decarbonization, transportation electrification, and demand management
- Relative role of subcontractor not entirely clear

II. Subcontractors

- Beech Hill Research LLC
- Experience in primary research with underserved and environmental justice people and communities
- Maine-based
- Heat pump survey for Efficiency Maine
- Interviewed low- to moderate-income households
- Researched affordability for Mass Office of Ratepayer Advocacy

III. Organizational Chart

- 5 professionals
- Project lead, lead analyst, analyst and subcontractor, with senior advisor

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER:** Vermont Energy Investment Corporation (VEIC)

**DATE:** March 28, 2024

- IV. Litigation
  - None
- V. Financial Viability
  - NA
- VI. Certificate of Insurances
  - Provided

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER:** Vermont Energy Investment Corporation (VEIC)

**DATE:** March 28, 2024

**EVALUATION OF SECTION III  
Proposed Services**

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

**Evaluation Team Comments:**

**A. Services to be Provided**

- Covers all items included in RFP
- Provides examples of graphics that would be included in a final report
- Proposes robust, streamlined analysis that is geographically explicit and tailored to local conditions, while also facilitating regional comparisons and broader programmatic and policy recommendations
- Uses publicly available data (e.g., the American Community Survey) and modeled estimates (e.g., the DOE LEAD Tool)
- Would provide sharable energy burden spreadsheets that clearly identify underlying data sources, calculations, and assumptions
- Would include GIS maps of energy affordability

**B. Implementation – Work Plan**

- Detailed work plan proposes specific actions for how the Bidder would conduct data collection and analysis necessary to support the project that meets deadline expectations in RFP
- Provides timeline for major tasks, but timeline includes minimal data
- Shares link to previous work, CT and VT studies; formatting is clear and easily readable, with color and graphic elements used effectively
- Study will include all fuel types and energy uses including space and water heating, cooling, lighting, appliances, and other plug loads, and transportation
- Would prepare energy burden maps to show geographic patterns
- All excel spreadsheets and other data used to produce the report would be made available along with cover sheets to explain each data set, assumptions used in the report, and specific analyses performed
- Proposes webinar to present findings to ERAC
- Proposed additional tasks if funding and time allow:
  - Assess the impact of beneficial electrification on household budgets in Maine
  - Create measure lists that reduce energy burden

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER:** Vermont Energy Investment Corporation (VEIC)

**DATE:** March 28, 2024

- Develop interactive online energy burden maps
- Program/portfolio review

**STATE OF MAINE  
TEAM CONSENSUS EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER:** Vermont Energy Investment Corporation (VEIC)

**DATE:** March 28, 2024

**EVALUATION OF SECTION IV  
Cost Proposal**

---

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
<b>\$39,000</b>	,	<b>\$55,845</b>	<b>x</b>	<b>30 points</b>	<b>=</b>	<b>21</b>

**Evaluation Team Comments:**

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** Applied Economics Clinic

**DATE:** March 20, 2024

**EVALUATOR NAME:** Andrew Landry

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

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\*\*\*\*\*

**Individual Evaluator Comments:**

- I. Organization Qualifications and Experience
  - 1. Overview of Organization
    - Massachusetts based
    - Focused on “energy, environment, consumer protection, and equity”
    - Previous work for Maine GEO
    - Sample project 1 related to “meeting Maine’s renewable targets over the next decade and AEC’s role was to assess the equity impacts of those options.” Equity element is relevant
    - Sample project 2 related to “potential pathway for reducing emissions in the District of Columbia: equitable electrification.” Again, equity element is relevant
    - Sample project 3 related to “equity measurement and how underserved communities will be served” in the implementation of Massachusetts’ energy efficiency plan. Again, equity element is relevant
    - Other projects listed on linked website included “New England Housing Costs: Rent as a Share of Income” which is a very similar study
  - 2. Subcontractors
    - NA
  - 3. Organizational Chart
    - Org chart provided shows two senior professionals and unknown number of subordinates. Website shows 11 total professionals
  - 4. Etc. - NA

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** Applied Economics Clinic

**DATE:** March 20, 2024

**EVALUATOR NAME:** Andrew Landry

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

II. Proposed Services

1. Services to be Provided

- Addresses requirements set forth in RFP
- Addresses specifically approaches for primary and secondary research collection

2. Implementation – Work Plan

- Detailed work plan with tasks and timelines provided
- Details plan for collecting primary and secondary research



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** Applied Economics Clinic

**DATE:** March 20, 2024

**EVALUATOR NAME:** Elizabeth Deprey

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

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\*\*\*\*\*

**Individual Evaluator Comments:**

I. Organization Qualifications and Experience

1. Overview of Organization

- Based in Boston
- P - Created State of Maine Renewable Energy Goals Market Assessment for the Governor's Energy Office in 2021, clear and well-formatted for readability
- P - Extensive experience in energy data analysis including collecting, organizing, and analyzing data from the U.S. Energy Information Administration, U.S. Department of Energy, U.S. Census American Community Survey
- P – Has done assessments of energy burden for other states

2. Subcontractors

- NA

3. Organizational Chart

- Senior Economist, Researcher, Assistant Researchers and Research Assistants (no indication on org chart as to the number of staff, but write-up states 15 staff members)

4. Etc. - Provides applied, on-the-job learning experiences to graduate students

II. Proposed Services

1. Services to be Provided

- Two written memos: Energy and Equity Analysis using secondary sources and Energy Burden Analysis using primary sources; findings to be combined into final product report

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** Applied Economics Clinic

**DATE:** March 20, 2024

**EVALUATOR NAME:** Elizabeth Deprey

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

- Seems consistent with RFP deliverables, but no mention of computer modeling
- Q – pg. 4, “AEC will review primary data provided by the State of Maine” Are they expecting OPA to provide the data for them to analyze?

2. Implementation – Work Plan

- The timeline is clear but the implementation steps seem vague

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** Applied Economics Clinic

**DATE:** March 20, 2024

**EVALUATOR NAME:** Kristina Winther

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

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**Individual Evaluator Comments:**

- I. Organization Qualifications and Experience
  - 1. Overview of Organization
    - Company is in Massachusetts
  - 2. Subcontractors
    - NA
  - 3. Organizational Chart
    - 15 staff members – founded in 2017
  - 4. Etc. -
    - Non-profit specializing on energy, env., consumer protection and equity
  
- II. Proposed Services
  - 1. Services to be Provided
    - Has provided a report to Maine about equity impacts of energy goals
    - Similar in DC
    - Researcher + senior economist
  - 2. Implementation – Work Plan
    - Clear steps, initial meeting then collect information
    - Bar chart showing steps

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** CollinsCEA

**DATE:** March 20, 2024

**EVALUATOR NAME:** Andrew Landry

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

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\*\*\*\*\*

**Individual Evaluator Comments:**

- I. Organization Qualifications and Experience
  - 1. Overview of Organization
    - Based in Maine
    - Significant work experience with Efficiency Maine Trust
    - Senior consultant is an engineer. Project coordinator has experience in social work. Could be helpful.
    - Strong experience with data bases
    - Sample projects are focused on measuring energy use
    - Organization's focus appears to be on technical/engineering type analyses
  - 2. Subcontractors
    - NA
  - 3. Organizational Chart
    - 2 professionals - small
  - 4. Etc. - NA
  
- II. Proposed Services
  - 1. Services to be Provided
    - Addresses services requested in RFP
    - Provides detailed discussion of approach to major tasks
    - Addresses potential challenges of primary data collection
  - 2. Implementation – Work Plan
    - Provided high level timeline and high level list of tasks
    - Lists staff assignments

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** CollinsCEA

**DATE:** March 20, 2024

**EVALUATOR NAME:** Elizabeth Deprey

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

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\*\*\*\*\*

**Individual Evaluator Comments:**

I. Organization Qualifications and Experience

1. Overview of Organization

- Based in Maine
- P – Has worked with Efficiency Maine Trust for 15 years, currently working with Bureau of General Services as Maine’s Energy Manager
- P - Familiarity with Maine’s primary and secondary data sources

2. Subcontractors

- NA

3. Organizational Chart

- Two staff, principal and project coordinator

4. Etc. - NA

II. Proposed Services

1. Services to be Provided

- Consistent with RFP language
- Proposed to expand to consider energy burden change over time

2. Implementation – Work Plan

- P - Very detailed, clear steps and proposed partners to collect Maine-based data from
- I - States the timeline does not allow for proper primary data collection
- P - Proposed addition of data visualization with Microsoft Power BI

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** CollinsCEA

**DATE:** March 20, 2024

**EVALUATOR NAME:** Kristina Winther

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

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**Individual Evaluator Comments:**

- I. Organization Qualifications and Experience
  1. Overview of Organization
    - In Maine
    - Engineering & technical expertise
    - Worked with EMT for 15 years
  2. Subcontractors
    - NA
  3. Organizational Chart
    - NA
  4. Etc. - NA
  
- II. Proposed Services
  1. Services to be Provided
    - Proposal is a restatement of the RFP
  2. Implementation – Work Plan
    - Bar chart of tasks and dates

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** Exeter Associates, Inc.

**DATE:** March 20, 2024

**EVALUATOR NAME:** Andrew Landry

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

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**Individual Evaluator Comments:**

I. Organization Qualifications and Experience

1. Overview of Organization

- Large organization, based in Maryland
- Prior work experience in Maine and for the OPA
- Significant experience with data bases
- Stated experience with data sets related to energy burden
- Performed “comprehensive” assessments of energy consumption and costs on behalf of State of Maryland
- One sample project included energy burden analysis as part of RPS policy assessment
- A second included “the impacts of electrification on household-level customer outcomes.”
- A third required “familiarity with policy initiatives that influence residential customer energy burden.”

2. Subcontractors

- NA

3. Organizational Chart

- Org chart shows 16 professionals plus support staff

4. Etc. - NA

II. Proposed Services

1. Services to be Provided

- Proposal addresses scope of work requested in RFP

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** Exeter Associates, Inc.

**DATE:** March 20, 2024

**EVALUATOR NAME:** Andrew Landry

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

- Detailed discussion of data categories
- Detailed discussion of potential data sources
- Detailed discussion of similar studies performed recently in other states
- Detailed discussion of how to improve on the 2019 Study
- Detailed discussion of data platform to be used

2. Implementation – Work Plan

- Timeline provided for 12 identified tasks
- Plan presented for delegating and managing tasks



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** Exeter Associates, Inc.

**DATE:** March 20, 2024

**EVALUATOR NAME:** Elizabeth Deprey

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

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\*\*\*\*\*

**Individual Evaluator Comments:**

- I. Organization Qualifications and Experience
  - 1. Overview of Organization
    - Based in Maryland
    - P - Extensive experience in data analysis, including for OPA
    - P - Experience developing dynamic and visually appealing analysis, as applicable to the proposed interactive web-browser tool.
    - I - Developed comprehensive assessments of energy consumption and costs on behalf of the Maryland Department of Natural Resource's Power Plant Research Program
  - 2. Subcontractors
    - NA
  - 3. Organizational Chart
    - Three staff proposed to carry out project: Matthew Hoyt, a Principal with Exeter, Project Manager; Katherine Fisher, Senior Economist, assistant and alternative Project Manager; Riya Bhargava, research assistant.
  - 4. Etc. - NA
  
- II. Proposed Services
  - 1. Services to be Provided
    - Proposes to create a detailed written report and an interactive, public-facing web tool
  - 2. Implementation – Work Plan
    - Outlines data and source needed to expand from the last Energy Burden Study to what this RFP includes

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** Exeter Associates, Inc.

**DATE:** March 20, 2024

**EVALUATOR NAME:** Elizabeth Deprey

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

- P - Detailed and clear steps to complete project
- P - Detailed and clear tables of data needed and where it may be acquired
- I – Proposes to use housing stock characteristics as well as other data sources not outlined in the RFP

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** Exeter Associates, Inc.

**DATE:** March 20, 2024

**EVALUATOR NAME:** Kristina Winther

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\*\*\*\*\*

**Individual Evaluator Comments:**

- I. Organization Qualifications and Experience
  - 1. Overview of Organization
    - In Maryland
  - 2. Subcontractors
    - NA
  - 3. Organizational Chart
    - Will include a senior economist experience in energy, utilities, social programs
    - Research assistant with experience with econometric analysis, SNAP
  - 4. Etc. -
    - Has done a project for Maryland on electrification for State's energy policy
    - Effect of electrification on households
    - Another project looked at electric school buses, effect on low-income households
    - Similar look at effect of energy storage on low-income/disadvantaged households
  
- II. Proposed Services
  - 1. Services to be Provided
    - Table showing data to be assembled and the sources
    - Ideas for all of the topics raised in the RFP

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** Exeter Associates, Inc.

**DATE:** March 20, 2024

**EVALUATOR NAME:** Kristina Winther

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

- Long list of similar studies from other states to be used as reference
2. Implementation – Work Plan
    - NA

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** London Economics International LLC

**DATE:** March 20, 2024

**EVALUATOR NAME:** Andrew Landry

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

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\*\*\*\*\*

**Individual Evaluator Comments:**

- I. Organization Qualifications and Experience
  - 1. Overview of Organization
    - Based in Boston
    - Previous work in Maine for OPA and PUC
    - Strong data base and computer analysis capabilities
    - Sample project 1 is Maine OPA NEB BCA analysis
    - Sample project 2 is Maine PUC Public Power CBA analysis
    - Sample project 3 is an analysis of rates on industrial customers
    - None are closely related to the services sought
  - 2. Subcontractors
    - NA
  - 3. Organizational Chart
    - Org Chart proposes four professionals on project
    - Large organization
  - 4. Etc. - NA
  
- II. Proposed Services
  - 1. Services to be Provided
    - Proposed services cover those requested in the RFP
    - Limited detail regarding services
    - Addresses critical steps
  - 2. Implementation – Work Plan
    - Timeline provide for 8 identified tasks
    - Does not include significant detail

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** London Economics International LLC

**DATE:** March 20, 2024

**EVALUATOR NAME:** Elizabeth Deprey

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

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**Individual Evaluator Comments:**

- I. Organization Qualifications and Experience
  - 1. Overview of Organization
    - Based in Boston, large organization
    - Overview references Kansas and ratemaking often, both of which are not relevant
  - 2. Subcontractors
    - NA
  - 3. Organizational Chart
    - References that staff have experience in New Jersey and PJM issues, also not relevant
    - Senior advisor, project manager and support staff
  - 4. Etc. - NA
  
- II. Proposed Services
  - 1. Services to be Provided
    - Proposes creating customer prototypes based on income and location to drive estimates of fuel and electricity usage
    - P - Proposes surveys and interviews to add to publicly available data
  - 2. Implementation – Work Plan
    - Not highly detailed but includes the basics outlined in the RFP

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** London Economics International LLC

**DATE:** March 20, 2024

**EVALUATOR NAME:** Kristina Winther

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**Individual Evaluator Comments:**

- I. Organization Qualifications and Experience
  - 1. Overview of Organization
    - In Boston, Mass
    - Do work in energy & water
  - 2. Subcontractors
    - Would submit "profiles" to OPA(?)
  - 3. Organizational Chart
    - NA
  - 4. Etc. -
    - Rate setting, rate design
    - ROE
    - Tariff design
    - Performance-based ratemaking
    - Worked with OPA on NEB
  
- II. Proposed Services
  - 1. Services to be Provided
    - Thin description of methodology
  - 2. Implementation – Work Plan
    - Bar chart, not a lot of detail

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** PMG Consulting, LLC

**DATE:** March 20, 2024

**EVALUATOR NAME:** Andrew Landry

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

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**Individual Evaluator Comments:**

- I. Organization Qualifications and Experience
  - 1. Overview of Organization
    - Virginia based
    - Disabled Veteran-owned
    - Specializes in utility regulation and finance, and cybersecurity
    - Strong computer and statistics capabilities
    - 2 of 3 sample projects related to utility ratemaking
    - 3<sup>rd</sup> sample related to analytical support for CPCN
    - No sample project similar to requested services
  - 2. Subcontractors
    - NA
  - 3. Organizational Chart
    - Four professionals
  - 4. Etc. - NA
  
- II. Proposed Services
  - 1. Services to be Provided
    - Services to be provided reflect those requested in RFP
  - 2. Implementation – Work Plan
    - Work plan lacked any significant detail
    - No discussion of method of data collection



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** PMG Consulting, LLC

**DATE:** March 20, 2024

**EVALUATOR NAME:** Elizabeth Deprey

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

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**Individual Evaluator Comments:**

- I. Organization Qualifications and Experience
  - 1. Overview of Organization
    - Based in Indiana, D.C., New Jersey
    - Consultant work includes rate consulting for City of Auburn, IN; Texas Office of Public Utility – projects seem very numbers- and data-focused
  - 2. Subcontractors
    - NA
  - 3. Organizational Chart
    - CEO, Lead Case Manager, Expert in Utility Regulations and Senior Researcher
  - 4. Etc. – Submission errors:
    - Appendix A is a duplicate of Appendix B
    - Appendix C references a different RFP#
  
- II. Proposed Services
  - 1. Services to be Provided
    - Proposes to create a national, regional and state dataset
    - Analysis potentially based on income, housing type, tenure status, race, ethnicity, and age of occupant
  - 2. Implementation – Work Plan
    - Not heavy detailed, three bullets – create schedule with our office, share drafts of “all written materials.” Then “Assist the Office in proposing reasonable schedules and deadlines to the MPUC for each stage of the proceedings.”

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** PMG Consulting, LLC

**DATE:** March 20, 2024

**EVALUATOR NAME:** Kristina Winther

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

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**Individual Evaluator Comments:**

- I. Organization Qualifications and Experience
  - 1. Overview of Organization
    - In Boston, certificate of liability insurance
  - 2. Subcontractors
    - NA
  - 3. Organizational Chart
    - NA
  - 4. Etc. - NA
  
- II. Proposed Services
  - 1. Services to be Provided
    - Restatement of RFP
  - 2. Implementation – Work Plan
    - No timeline or tasks

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** Resource Refocus LLC

**DATE:** March 20, 2024

**EVALUATOR NAME:** Andrew Landry

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

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\*\*\*\*\*

**Individual Evaluator Comments:**

- I. Organization Qualifications and Experience
  - 1. Overview of Organization
    - California based
    - Women-owned
    - Emphasize experience in building performance analysis
    - Sample project 1 is a decarbonization analysis of buildings
    - Sample project 2 is residential codes research
    - Sample project 3 related to building-scale transportation, water, solid waste, and energy management strategies
  - 2. Subcontractors
    - NA
  - 3. Organizational Chart
    - 7 employees involved in project
    - 2 devoted to data visualization
  - 4. Etc. - NA
- II. Proposed Services
  - 1. Services to be Provided
    - Proposes using building type approach
    - Recommends using the National Renewable Energy Lab's (NREL) ResStock tool to collect and aggregate granular household energy expenditure, income, and energy burden information
    - Believes primary research is infeasible for budget
  - 2. Implementation – Work Plan
    - Timeline provided for 7 major tasks
    - Provides general overview of data collection and analyses tasks

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** Resource Refocus LLC

**DATE:** March 20, 2024

**EVALUATOR NAME:** Elizabeth Deprey

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

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\*\*\*\*\*

**Individual Evaluator Comments:**

- I. Organization Qualifications and Experience
  - 1. Overview of Organization
    - Based in California, New York
    - Experience in large scale data analysis, regression-based and inverse parameter modeling, building performance simulation, billing analysis, and statistical techniques
    - Projects listed are building/housing focused, includes energy management
  - 2. Subcontractors
    - NA
  - 3. Organizational Chart
    - Lists principal, business operations manager, project manager and 4 consultants, two of whom are designated for data visualization
  - 4. Etc. - NA
  
- II. Proposed Services
  - 1. Services to be Provided
    - Suggests using the National Renewable Energy Lab's (NREL) ResStock tool to collect and aggregate granular household energy expenditure, income, and energy burden information
      - Rather than primary data collection
      - Open-source modeling tool that represents the US building stock (based on more than 20 million simulations), 2018 data

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** Resource Refocus LLC

**DATE:** March 20, 2024

**EVALUATOR NAME:** Elizabeth Deprey

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

- Resource for state and local decision makers considering options for energy retrofits for their housing stock to reduce carbon emissions, energy use, and/or utility bills
  - ResStock includes a representative income for each dwelling unit (separated by geography, household size, federal poverty level, renter/owner status, and building type) to calculate the energy burden for occupied dwelling units, corresponding to the one-year energy bill as a percentage of household income for both baseline and retrofit results.
  - Does not include household transportation expenditures, electric or otherwise
  - Consultant would supplement ResStock data with secondary sources
2. Implementation – Work Plan
- Detailed schedule that meets the timeline
  - Deliverable: clearly written and reader-friendly report

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** Resource Refocus LLC

**DATE:** March 20, 2024

**EVALUATOR NAME:** Kristina Winther

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

\*\*\*\*\*

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\*\*\*\*\*

**Individual Evaluator Comments:**

- I. Organization Qualifications and Experience
  - 1. Overview of Organization
    - California
    - Engineering, architecture, technology
    - Building design
  - 2. Subcontractors
    - NA
  - 3. Organizational Chart
    - NA
  - 4. Etc. - NA
  
- II. Proposed Services
  - 1. Services to be Provided
    - Retrofits to housing stock
  - 2. Implementation – Work Plan
    - NA

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** Vermont Energy Investment Corporation (VEIC)

**DATE:** March 20, 2024

**EVALUATOR NAME:** Andrew Landry

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

\*\*\*\*\*

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\*\*\*\*\*

**Individual Evaluator Comments:**

I. Organization Qualifications and Experience

1. Overview of Organization

- Vermont based
- Experience in Maine
- Expertise in energy efficiency, building decarbonization, transportation electrification, and demand management
- Sample project 1, as operator of Efficiency Vermont, in 2016 led the state's first energy burden analysis to understand better how to reach low-income Vermonters by examining energy costs relative to income through census block group and zip code, updated in 2019 and 2023
- Sample project 2, in Connecticut analyzed geographic patterns in the affordability of energy, housing, transportation, and water. Using publicly available datasets for each category, VEIC estimated household spending and total cost burden as well as combined spending on housing and transportation.
- Sample project 3, in Maryland, performs comprehensive assessment of and recommendations for utility residential and low income energy efficiency plans

2. Subcontractors

- Beech Hill Research LLC
- Experience in primary research with underserved and environmental justice people and communities

3. Organizational Chart

- 5 professionals

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

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**DATE:** March 20, 2024

**EVALUATOR NAME:** Andrew Landry

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

4. Etc. - NA

II. Proposed Services

1. Services to be Provided

- Covers items included in RFP
- Proposes and provides examples of graphics that would be provided

2. Implementation – Work Plan

- Detailed work plan addressing specific proposals for how it would conduct data collection and analysis necessary to support the project
- Timeline for major tasks



**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

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**DATE:** March 20, 2024

**EVALUATOR NAME:** Elizabeth Deprey

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

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\*\*\*\*\*

**Individual Evaluator Comments:**

I. Organization Qualifications and Experience

1. Overview of Organization

- Based in Vermont
- In addition to full-service consulting, VEIC administers three large-scale sustainable energy programs: Efficiency Vermont, the nation's first statewide energy efficiency program; Efficiency Smart in Ohio; and the DC Sustainable Energy Utility (DCSEU).
- Experience conducting energy burden analyses; understands the metrics and data that are required for a comprehensive picture of energy affordability
- Led efforts to understand and measure energy burdens in several states: CT, NH, VT. Currently conducting in WI.

2. Subcontractors

- Maine-based Beech Hill Research LLC
  - Heat pump survey for Efficiency Maine
  - Interviewed low- to moderate-income households
  - Researched affordability for Mass Office of Ratepayer Advocacy

3. Organizational Chart

- Project lead, lead analyst, analyst and subcontractor, with senior advisor

4. Etc. - NA

II. Proposed Services

1. Services to be Provided

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

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**EVALUATOR DEPARTMENT:** Office of the Public Advocate

- Robust, streamlined analysis that is geographically explicit and tailored to local conditions, while also facilitating regional comparisons and broader programmatic and policy recommendations
  - Uses publicly available data (e.g., the American Community Survey) and modeled estimates (e.g., the DOE LEAD Tool)
  - Sharable energy burden spreadsheets that clearly identify underlying data sources, calculations, and assumptions
2. Implementation – Work Plan
- Very detailed with clear steps and data sources, meets deadline expectations in RFP
  - Shared link to previous work, CT and VT studies; formatting is clear and easily readable, with color and graphic elements used effectively
  - Study will include all fuel types and energy uses including space and water heating, cooling, lighting, appliances, and other plug loads, and transportation
  - Energy burden maps to show geographic patterns
  - All excel spreadsheets and other data used to produce the report will be made available along with cover sheets to explain each data set, assumptions used in the report, and specific analyses performed
  - Webinar to present findings to ERAC, will provide slide deck to us
  - Proposed additional tasks if funding and time allow:
    - Assess the impact of beneficial electrification on household budgets in Maine
    - Create measure lists that reduce energy burden
    - Develop interactive online energy burden maps
    - Program/portfolio review

**STATE OF MAINE  
INDIVIDUAL EVALUATION NOTES**

**RFP #:** 202402045

**RFP TITLE:** Energy Burden Study

**BIDDER NAME:** Vermont Energy Investment Corporation (VEIC)

**DATE:** March 20, 2024

**EVALUATOR NAME:** Kristina Winther

**EVALUATOR DEPARTMENT:** Office of the Public Advocate

\*\*\*\*\*

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\*\*\*\*\*

**Individual Evaluator Comments:**

- I. Organization Qualifications and Experience
  - 1. Overview of Organization
    - In Vermont
    - Has done energy burden studies in CT, NH
    - Currently doing one for Wisconsin right now
  - 2. Subcontractors
    - NA
  - 3. Organizational Chart
    - NA
  - 4. Etc. - NA
  
- II. Proposed Services
  - 1. Services to be Provided
    - GIS maps of energy affordability
    - Generic rewrite of OPA RFP
  - 2. Implementation – Work Plan
    - Timeline with minimal data



STATE OF MAINE  
OFFICE OF THE PUBLIC ADVOCATE

Janet T. Mills  
Governor

William S. Harwood  
Public Advocate

**AGREEMENT AND DISCLOSURE STATEMENT**  
**RFP #: 202402045**  
**RFP TITLE: Energy Burden Study**


I, Andrew Landry, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Office of the Public Advocate. 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

2/22/24  
\_\_\_\_\_  
Date



STATE OF MAINE  
OFFICE OF THE PUBLIC ADVOCATE

Janet T. Mills  
Governor

William S. Harwood  
Public Advocate

**AGREEMENT AND DISCLOSURE STATEMENT**  
**RFP #: 202402045**  
**RFP TITLE: Energy Burden Study**

I, Kristina Winther, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Office of the Public Advocate. 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

2/27/24  
\_\_\_\_\_  
Date



STATE OF MAINE  
OFFICE OF THE PUBLIC ADVOCATE

Janet T. Mills  
Governor

William S. Harwood  
Public Advocate

**AGREEMENT AND DISCLOSURE STATEMENT**  
**RFP #: 202402045**  
**RFP TITLE: Energy Burden Study**

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

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

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A handwritten signature in blue ink, appearing to be 'E. Deprey', written over a horizontal line.

Signature

A handwritten date '2/26/24' in blue ink, written over a horizontal line.

Date