

**CITY OF BOSTON**

**REQUEST FOR QUALIFICATIONS**

**FOR**

**BOSTON MUNICIPAL AGGREGATION PROGRAM**

**CONSULTING SERVICES**

**AUGUST 27, 2018**

**MARTIN J. WALSH**

Mayor

**CARL SPECTOR**

Commissioner of the Environment  
Department

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# 1. Introduction

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## 1.1. Introduction

**Official:** Carl Spector, Commissioner of the Environment  
Department

**Address:** 1 City Hall Square, Room 709, Boston, MA 02201

**RFQ Primary Contact Person:** David Musselman, Director of the Municipal Energy Unit

**Email:** [david.musselman@boston.gov](mailto:david.musselman@boston.gov)

This Request for Qualifications (RFQ) is being issued by the City of Boston (the “City”) to solicit the services of a qualified Municipal Electric Aggregator (the “Consultant”) to perform the following services.

- Develop a Municipal Aggregation Program (“Program”) to aggregate the electrical load of electricity customers within the City (“Program Participants”). Specifically, the City seeks to implement a Program that will prioritize cost stability, minimize costs relating to Program administration and commodity purchases, and provide Program Participants with opportunities to purchase electricity produced by renewable sources of power.
- In consultation with the Commonwealth’s Department of Energy Resources (DOER) and Department of Public Utilities (DPU), assist the City to develop and secure regulatory approval for the Program.
- Perform all services related to implementing and administering the Program as defined by, and in compliance with, M.G.L. c.164, §134 and any other applicable statute or regulation.

## 1.2. Goals of the Municipal Aggregation Program

The goals of the Municipal Aggregation Program are as follows:

- **Electricity cost stability:** providing electricity cost stability, as compared with the semi-annual variations in price per kilowatt hour (kWh) that characterize the default electricity rates offered by Eversource, the City’s local distribution company.
- **Program and electricity cost minimization:** minimizing the cost of Program administration and commodity purchases for all Program Participants.
- **Support of renewable energy and sustainability goals:** providing Program Participants with an option to purchase renewably-sourced electricity, which will advance the City’s sustainability goals by displacing fossil fuel electrical generation and reducing greenhouse gas (GHG) emissions. This can occur through direct investment in renewable energy projects, the purchase of market-based instruments such as renewable energy certificates (RECs), or other strategies. Options for Program Participants to receive electricity produced by renewable sources of generation may result in “additionality”—that is, the construction of new renewable energy projects. The City is interested in proposals or strategies that will evidence

such additionality. Whenever possible, depending on cost, such quantities of renewable power and/or RECs shall be above and beyond what is required by the Commonwealth of Massachusetts Renewable Portfolio Standard (RPS).

- **Highly effective communications and customer service:** that addresses the demographics of and needs specific to Boston residents.

The City's 2017 potential aggregate electric load equaled approximately 1.7 million MWh, excluding existing competitive supply customers.

The City desires to contract for Program electricity supply at rates (\$/kWh) lower than the rates that are reasonably projected to be charged by Eversource for default service. Consultants should assume that the favorability of Program rates will be considered over the entire length of the aggregation contract. To provide commodity pricing that is both favorable and stable, the term of commodity supply contracts may vary in duration from Eversource's electricity supply contracts. The times when the Program procures electricity to serve Program Participants may not be scheduled to be completed at regular intervals. The Consultant will work with the City and its advisor or broker to develop a strategy for electricity purchases.

### 1.3. Duration of Contract

The contract that the City will execute with the successful Respondent will be for a term of two years, and will include an option to renew and extend the contract for an additional one-year period. The option to renew and extend the contract will be exercised at the City's sole discretion.

## 2. RFQ Process

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### 2.1. Selection Process

A selection committee will determine which technical proposals meet the minimum evaluation criteria set forth in **Section 6** below, and will evaluate and rank the technical proposals of qualified Respondents.

During the evaluation process, the Selection Committee (in the following order) will undertake the following:

- review technical proposals that meet the minimum evaluation criteria;
- pose, as needed, written or in-person questions for clarification;
- evaluate provided references in order to determine each Respondent's experience, capability, integrity, and reliability to perform the work; Is
- perform any other due diligence;
- rank the technical proposals in accordance with the comparative evaluation criteria set forth in the **Section 6** below;
- conduct interviews with the five top-ranked Respondents, after which it will adjust technical proposal rankings if necessary; and then
- select the most advantageous technical proposal.

The City will then request a pricing proposal from the Respondent whose technical proposal has been deemed the most advantageous by the Selection Committee. The City would prefer pricing to be provided on a fee basis (that is, not a mill rate (\$/kWh)) for the aggregated load). Payment of fees shall be provided on a fixed or hourly basis for each of the activities, but the City may consider fees structured on a per account or per kWh basis after pricing on a fixed or hourly basis has been submitted. Such fees shall remain in effect, without escalation, during the entire term of the contract, including the one-year renewal of the contract should the City exercise its option to extend the contract term. Consideration will be given to the amount of work, functional tasks, and applied strategies during different years of the contract.

If the City and the top-ranked Respondent cannot come to a mutually satisfactory agreement on pricing, the City will negotiate pricing with the firm offering the next most advantageous technical proposal. The City will continue negotiating with ranked Respondents until a contract is successfully negotiated.

Subject to the approval of the Mayor, the Official will make the final determination of award.

### **3. Scope of Services**

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#### **3.1. Legislative Research**

In 1997, the Commonwealth of Massachusetts passed legislation relative to restructuring the electric utility industry which authorized municipal aggregation ("Municipal Aggregation"). Retail access to the electricity market commenced March 1, 1998. The Respondent shall complete the following tasks:

1. Analyze the existing legislation and its impact to the Municipal Aggregation/supply/energy Program efforts of the City;
2. Review any subsequent amendments to the 1997 legislation and conduct a review of any statutory changes pending within the General Court and any regulatory changes pending at the Commonwealth of Massachusetts Department of Public Utilities ("DPU");
3. Monitor relevant Federal legislation and regulations for potential impacts to the Program; and
4. Analyze the Solar Massachusetts Renewable Target (SMART) Program (which is replacing the Solar Carve-Out Program) and its effect on the additionality of renewable energy projects in the Commonwealth.

#### **3.2. Advise the City in its Discussions and Negotiations with Eversource**

In 2017, the residential and commercial load within the City (exclusive of distribution customers with existing third-party supply contracts) equaled approximately 1.7 million MWh. There are approximately 191,000 residential, 24,000 small commercial, and 7,000 large commercial customers currently receiving Eversource basic service. To implement the Program, the City will require the Consultant to support coordination with Eversource to design and deliver the Program. This will include determining the responsible parties for each phase of the administration and facilitation of the Program, including enrollment and disenrollment, customer

invoicing and reconciliation of revenue from customers, and payments to the applicable competitive supplier delivering electricity to Program Participants.

The Consultant's specific focus shall be on ensuring that the potential solutions are viable from an operational and administrative perspective.

### **3.3. Develop Aggregation Program**

#### **3.3.1 Feasibility Analysis**

The Consultant shall perform all technical and legal tasks necessary to completely and accurately analyze load data, and to assess the Program's current and future power supply requirements.

#### **3.3.2 Community Input**

The Consultant shall assist the City in seeking input on community-preferred default and opt-in/opt-out renewable energy options.

The Consultant shall assist the City with the development and distribution of content to inform City residents about the draft Program (3.3.3), and soliciting and evaluating their input.

The Consultant shall develop the community input and communication strategy to reflect the unique characteristics of the Boston community, including size and demographics, language, and other appropriate factors.

#### **3.3.3 Develop Aggregation Program**

The Consultant shall develop a Program that, in addition to meeting all statutory and regulatory requirements, includes the City's goals. The Consultant shall also include the following in the Program.

- **Document a strategy for determining the level and type of renewable energy to supply** in the default Program and other product offerings, including the extent to which the products require additionality. Document the methodology for calculating the impact of the Program in terms of GHG emissions reduced, MW of renewable energy capacity developed, and any other relevant environmental or sustainability metrics. The Consultant should produce preliminary analyses of such impacts based on the projected aggregate load of Program Participants.
- **Establish procedures to respond** to consumer queries and problems; power supplier problems; distribution company problems; media queries; and proposed changes in law or policy that may impact the Program.
- **Recommend a public education and information strategy** to be used to support all phases of the Program, including customer enrollment/disenrollment, and information updates and monitoring after enrollment.
- **Develop a program for ongoing customer support** including, but not limited to the following items.
  - A comprehensive communication Program spanning both the Opt-Out and post-implementation periods that includes printed materials, online resources,

community meetings, with the Consultant present, and other means which are designed to reach the full range of Boston residents and small businesses, including consideration of demographics, language and other appropriate factors.

- Commitment to attend meetings with municipal officials, as required.
- Providing written reports on a periodic basis regarding Program participation and achievement of contract milestones and goals.
- Continuous analysis regarding the development of marketing and regulatory issues, including advice on any proposed legal or regulatory changes that might affect the Program.
- **Monitoring all aspects of the Program** including all contracts with electricity suppliers, and resolving any supply contract issues that may arise.

### **3.4. Secure Approval of Aggregation Plan**

The Consultant shall prepare and submit, with City approval, the aggregation plan and all required filings with the DOER, the DPU, and any other appropriate state agency. Represent the City in all communications with these state authorities, and attend hearings and meetings as required. Ultimately secure approvals from the Massachusetts Department of Energy Resources (DOER) and Department of Public Utilities (DPU).

### **3.5. Assist with Electricity & Renewable Energy Procurements**

#### **■ Development of Electricity Supplier RFP**

The Consultant will assist the City and its electricity purchasing consultant with the development of Requests for Proposals (RFPs) for electric supply for the Program. The RFPs will include, at a minimum, the following key components:

- A description of the load aggregation;
  - the potential size and shape of the aggregated load; and
  - the number of customers or accounts and load within the City.
- Desired services and features;
- Qualifications criteria;
- Selection criteria;
- Essential provisions for the standard supply contract; and
- Terms of service.

Supply billing for Program Participants will be included in the electric bill from the local distribution company, Eversource.

The Consultant shall assist the City and its supply broker to assure that all Program supply contracts are in the best interests of the City and comply in every respect with the requirements

of the Program. Nothing herein shall preclude the City from having outside legal counsel review any such recommendations or requirements.

### ■ Assistance with Renewable Energy Procurements to Ensure Additionality

The Contractor will assist the City and its renewable energy purchasing consultant to develop RFPs to provide Program Participants with one or more options to add renewably sourced power to the default service offered through the Program. If a contract other than the primary electricity supply contract is needed to ensure the additionality of the renewable projects from which such power or attributes (RECs) are produced, the Consultant will provide recommendations to administer payments for all such purchases.

### **3.6. Program Participant Enrollment/Transition**

Upon execution of each electric or renewable energy supply contract, the Consultant will assist with the transfer of Program Participant data from Eversource to each new supplier.

### **3.7. Provide Public Education**

For both the Opt-In customer enrollment and post-enrollment periods of the Program the Consultant shall prepare, or cause to be prepared, all information and education materials for the general public and for the media, subject to approval of the City.

The Consultant should have programs to message and engage with different stakeholder groups within the City (e.g. residents, businesses, elected officials, and Program Participants). The Consultant will be responsible for ensuring that any such messaging and engagement programs are available and accessible to all Boston audiences including, but not limited to, the elderly, households with low or fixed incomes, and people who do not speak English as a first language.

Consultant shall seek to coordinate communication efforts with, and to the extent practicable, use, other resident communication programs including, but not limited to, Greenovate Boston and Renew Boston.

### **3.8. Manage and Monitor Program**

The Consultant will administer and provide technical oversight of the Program including but not limited to the following.

#### **3.8.1 Ongoing Customer Support for Boston Ratepayers**

- Administer the "opt-out" process for Program Participants;
- Respond to all questions received from Program Participants and other interested individuals, whether received via phone or email, in a timely manner (all such communications and responses will be logged and tracked to completion in a mutually agreed upon manner); and
- Provide a hotline and a webpage on the City's [www.boston.gov](http://www.boston.gov) domain where Program Participants and others can obtain relevant information concerning the features of the Program.



### 3.8.2 Ongoing Customer Support for City Officials Administering the Program Consulting Services Contract

- Prepare all required filings for the Department of Energy Resources ("DOER"), the Department of Public Utilities ("DPU"), or any other state agency, if applicable, with regulatory authority over the Program.
- Participate in negotiations with the competitive suppliers and the distribution company serving the City as it relates to the Program.
- Monitor and report on compliance by commodity suppliers relative to all subject contract terms and conditions as they relate to the Program, and the resolution of any commodity contract issues.
- Reports and Updates
  - Prepare written reports on the ongoing operations of the Program to be submitted on a quarterly basis, or other periodic term as agreed to by the City, and upon the request of City officials. Such reports should include information about Program participation, the achievement of Consultant contract milestones and municipal goals; as well as cost, energy and renewable data.
  - On an annual basis, provide a report that analyzes the Program's renewable energy component in terms of GHG emissions reductions, MW of renewable generation added to the grid, and any other metrics the Consultant deems relevant, including the evidence supporting these claims.
  - Provide routine updates and attend meetings with the City officials.
- Analysis:
  - Conduct ongoing review of market and regulatory issues and advise the municipality on any proposed changes in law or regulation which may affect the Program.

## 4. Submission of Proposals

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### 4.1. Content of Technical Proposals; Date, Time, Means, and Location of Submission

Respondents must submit their technical proposals no later than **4:00 o'clock p.m. EDT, October 10, 2018**, by making physical delivery to the office of the Official at the address provided in Section 1.1, above. **No late proposals will be accepted.** Technical proposals will be opened publicly in the presence of two or more witnesses at 10:00 o'clock a.m. EDT, October 11, 2018, at the office of the Official.

Respondents may submit their technical proposals via U.S. Mail, via courier, or in person. Respondents must submit one (1) complete technical proposal inside a sealed envelope together with one (1) searchable, digital copy of the identical technical proposal in .PDF file format (on a USB "thumb" drive). ("Searchable" means that a standard .PDF reader with a Find/Search tool may be used to search for a keyword in the technical proposal.) The naming convention for the digital .PDF copy should be "[COMPANY NAME]-RFQ for BMAP Consulting

Services”). **All physical deliveries must be made no later than 4 o’clock p.m. EDT, October 10, 2018. No late technical proposals will be accepted.**

Sealed envelopes containing technical proposals should be clearly marked as follows

[COMPANY NAME]

RFQ for BMAP Consulting Services

[DATE SUBMITTED]

and should be delivered or sent to

David Musselman  
Environment Department  
City Hall Room 709  
One City Hall Square  
Boston, MA 02201-2023

**Technical proposals delivered via U.S. Mail, courier (or in person), or overnight couriers should be placed inside a sealed envelope labeled pursuant to the instructions just stated PRIOR to being sealed inside the envelope/package used to make delivery**

All Respondents must also complete and sign the following documents, and return them inside the sealed envelope containing their submitted Technical Proposals:

- Certificate of Authority—Form CM 06 (Exhibit I)
- Standard Contract & Standard Contract General Conditions—Form CM 10-11 (Exhibit II)
- Contractor Certification—Form CM 09 (Exhibit III)
- CORI Compliance—Form CM 15A (Exhibit IV)
- Covered Vendors Living Wage Agreement—Form LW-2 (Exhibit V)
- Covered Vendors Living Wage Affidavit—Form LW-8 (Exhibit VI)
- Wage Theft Certification Form CM16 (Exhibit VII)

Electronic copies of the above documents can be accessed at <http://bit.ly/2P9ZMoO>. Many of the contract documents provided at that location can be populated/completed electronically. **The City requires Respondents to execute the above documents with original signatures. The City cannot accept electronic delivery of any technical proposal or any of the above required contract documents.**

Each of the following contract documents shall be merged into the executed contract, and should also be returned inside the sealed envelope containing each Respondent’s technical proposal.

- Specifications—Form CM 04 (Exhibit VIII)
- CORI Compliance Standards—Form CM 15B (Exhibit IX)
- Jobs and Living Wage Ordinance Notice to Vendors—Form LW-1 (Exhibit X)

- Advertisement (Exhibit XI)

## 4.2. Additional submission information

- The City assumes no liability for and will not reimburse any costs incurred by any Respondent (whether or not selected) in developing technical proposals in response to this RFQ.
- Failure of a Respondent to completely investigate the RFQ, and/or to be thoroughly familiar with this RFQ, shall in no way relieve any such Respondent from any obligation with respect to their submission.
- Submission of a technical proposal shall be deemed acknowledgement that the Respondent is familiar with the Massachusetts Public Records Law, M.G.L. c.66, §10 and is bound thereby. Disclosure of any information provided by any Respondent in connection with this RFQ shall be in strict accordance with the laws and regulations regarding such disclosure pursuant to M.G.L. c.66, §10.
- Submission of a technical proposal shall be deemed permission to the Selection Committee to make inquiries concerning the Respondent to any persons or firms deemed appropriate by the Selection Committee, including any named subcontractors.
- Each technical proposal will be reviewed for completeness, and incomplete submissions may be rejected without further consideration. A technical proposal will be considered complete if all requested sections and information, and all required contract documents, are included in the proper order. Respondents shall use the prescribed format to indicate their experience and qualifications and describe their approach to implementing the Program for the City.

## 4.3. Timeline

The timeline for the RFQ is as follows:

Event	Date	Time (EDT)
Release of RFQ	August 27, 2018	12:00 noon
Submit Written Questions to <a href="mailto:david.musselman@boston.gov">david.musselman@boston.gov</a>	September 14, 2018	4:00 p.m.
Posting Responses to <a href="http://bit.ly/2P9ZMoO">http://bit.ly/2P9ZMoO</a>	September 26, 2018	5:00 p.m.
Submission of Response	October 10, 2017	4:00 p.m.

## 5. Submission Requirements

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### 5.1. Minimum Eligibility Requirements

Respondents must:

- have previous experience analyzing and advising clients on DPU and DOER regulatory requirements related to municipal aggregation programs;
- have previous experience in the energy industry including, but not limited to
  - having demonstrated experience in electricity procurement, and
  - having expertise in renewable energy policy that can be implemented via a municipal aggregation program; and
- have demonstrated experience in community outreach, marketing and education.

### 5.2. Technical Proposal

Respondents shall submit technical proposals that include the following requirements. The City reserves the right to reject proposals submitted without these required items.

#### 5.2.1 Narrative Describing Approaches to Potential Program Challenges

Respondents must provide a narrative explaining the following:

- How their firm meets the minimum qualifications stated in the preceding Section 5.1;
- How their firm would approach renewable energy additionality, with a separate statement regarding the additionality of solar projects in Massachusetts in the context of the Solar Massachusetts Renewable Target (SMART) Program; and
- How their firm would address the financial, operational, and/or administrative challenges that may arise and proposed solutions to those challenges.

#### 5.2.2 Respondent Background

1. Provide background on the Respondent's firm, such as years in business, years operating in Massachusetts, services offered in addition to municipal aggregation, etc.
2. Note location of the offices from which the consulting services will be managed.
3. If Respondent has any financial interest in any energy supplier or renewable energy provider (or vice versa), Respondent should disclose such interests and provide a statement as to why such interest(s) will not limit or reduce the City's access to the most competitive process possible for its commodity procurements.

#### 5.2.3 Personnel

Respondents should describe projected resource availability for the anticipated duration of the consulting contract. This includes identifying and providing short biographies of the key project personnel that will work on the project, field(s) of expertise, years of experience, specific responsibilities on the project, and the percentage of estimated time they will work on the

project. Include any relevant experience, such as the number of similar projects in which the employee has directly participated.

#### **5.2.4 References**

Please select three (3) clients to serve as references, and provide the names, phone numbers, and emails (if available) of the responsible individuals employed by each such client. Please also provide a succinct description of the projects undertaken for each client (up to a half page each).

#### **5.2.5 Legal Proceedings**

Respondent shall include a statement of any legal proceedings pending or concluded within the past five (5) years relating to the performance of services by the Respondent.

#### **5.2.6 Optional Services/Extras**

At the option of the Respondent, propose additional and/or alternate elements to expand the scope of services to improve the ability of the City to meet the Program goals stated in Section 1.2.

#### **5.2.7 Qualifications for Implementing Municipal Aggregation**

1. Provide a description of the Respondent's experience with municipal aggregation in Massachusetts and aggregation programs in other states, if applicable. The description should highlight successes in achieving approval of aggregation programs and implementing effective public education and outreach programs.
2. Provide the following information:
  - a. MWh/year of aggregate load served by Massachusetts municipal aggregations for which your firm currently provides consulting services.
  - b. A list of all clients the Respondent has provided similar services to in the past three years or is currently providing similar services to. The preference is for clients for which the Respondent has successfully completed an aggregation, which will be defined as having achieved the following:
    - Approval of municipal aggregation program by the appropriate regulatory authorities;
    - Assistance with the procurement of commodity supplies for any such municipal aggregations; and
    - For any municipal aggregations which did not go forward, were not approved or have been terminated or suspended, provide information explaining the reasons they did not go forward or are no longer operating, including a comparison of the price between the basic service rates provided by the local utility distribution company and the rates offered by the municipal aggregation program, and any damages, penalties, or other charges incurred by the municipality associated either with the termination of the program, or the cancelation, termination, or suspension of any energy supply contract or renewable energy contracts.

- c. For each client listed included in clause “b” above, please indicate whether the first two milestones have been completed and please provide:
  - the name and location of the municipality;
  - total population served through the municipal aggregation or similar service;
  - the annual MWh load served; and
  - data indicating the monthly or term savings (or losses) for each municipal aggregation or similar service as compared to the basic service rates offered by the local distribution companies during the term.
3. Briefly describe Respondent’s understanding of the regulations in Massachusetts pertaining to municipal aggregations, including precedents established or rulings by the Department of Public Utilities that shape how such programs may be structured or what features may be included. This would include the ability of the City to implement ladder or hedged supply contracts, kWh adders to fund supporting staff or related Programs features or activities, termination and re-activation of programs, etc.
4. Provide an example of a past outreach strategy prepared to implement a municipal aggregation program along with representative samples of any outward-facing communications that were included. Please describe the firm’s experience providing translation services as part of past outreach strategies, including the presentation of materials to non-English speakers, or ESL speakers.

### **5.2.8 Qualifications for Delivering Renewable Energy Additionality**

1. Describe the Respondent’s understanding of additionality. What other attributes contribute to additionality? Can a link be made between additionality and GHG reductions? Can additionality be claimed when purchasing RECs from facilities that already exist? For renewable projects here in the Commonwealth do Massachusetts Class I RECs guarantee additionality? In light of the relatively clean electricity grid in New England, would higher levels of GHG reductions be achieved by pursuing additionality in less green independent system operator territories (e.g. PJM, MISO, etc.)?
2. Describe the Respondent’s experience identifying and procuring suitable renewable energy projects generally and renewable energy that would meet the additionality requirement of the Program.
3. Has the Respondent analyzed renewable energy purchases for additionality? If so, describe the process used and the client(s) for which such analyses were performed.

### **5.2.9 Technical Approach to Implementing the Scope of Services**

Describe in detail the work program, schedule, and mechanics of how the prospective Respondent will accomplish each task included the Scope of Services. Respondents should expand on the generalized outline of methods contained in the Scope, with specific details of how each of the tasks could be best accomplished. Respondent should describe unusual conditions or problems the Respondent believes may be encountered, or that may be unique to the City.

### 5.2.10 Technical Approach to Implementing the Scope of Services:

#### Procurement

1. Explain the methodology your firm would use to recommend which offers from third party commodity suppliers would be in the best financial interest of Program Participants.
2. Based on the Respondent's understanding of additionality, as described above, what strategy(ies) would it offer to encourage the development of new renewable energy generation? The City wishes to encourage innovative solutions and will also accept strategies for achieving additionality through
  - a. Direct Investment in a renewable energy project and
  - b. Other strategies

Number each strategy and for each strategy offered, describe the following:

- a. Characteristics of qualifying projects or purchases (e.g. REC attributes);
- b. Process for identifying and executing qualifying payments or purchases;
- c. Explanation of how each strategy ensures additionality;
- d. How to correlate Program renewable energy purchases with the quantities of renewable generation constructed and GHG emissions avoided (please note if and where there is any uncertainty regarding those quantities);
- e. Whether for any of the proposed strategies there are certain contracting lengths or structures that are required, or whether there are there any restrictions in terms of total load size or other municipal attributes that might limit the applicability of the strategy to the City?

### 5.2.11 Technical Approach to Implementing the Scope of Services: Outreach

For the task "Provide Public Education," Respondent should address how it would manage messaging and engagement differently for each key stakeholder group in a community - e.g. residents, business, public officials, etc. Respondent should also describe how it would tailor its engagement Program based on the characteristics of the City, including the diversity of its residents.

## 6. Evaluation Criteria

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### 6.1. Minimum Evaluation Criteria

In order to be considered responsive, a proposal must have all information and documents required in the Sections 4.1 and 5.2.

## 6.2. Comparative Evaluation Criteria

All responsive proposals will be evaluated in the following areas based on comparative evaluation criteria for Highly Advantageous (HA), Advantageous (A), or Not Advantageous (NA). Feedback gained from references may affect the rating assigned in any applicable category:

<b>5.2.1 Qualifications Relating to Addressing Potential Program Challenges</b>	
HA	Respondent demonstrates superior qualifications for assisting the City with developing approaches to addressing potential challenges of the Program via thoughtful and insightful feedback.
A	Respondent demonstrates good qualifications for assisting the City with developing approaches to addressing potential challenges of the Program by providing feedback to the questions posed.
NA	Respondent demonstrates poor qualifications for assisting the City with developing approaches to addressing potential challenges of the Program by not fully responding to the questions.

<b>5.2.2 and 5.2.3 Qualifications of Project Personnel and Firm</b>	
HA	Respondent demonstrate(s) superior training, educational background and work experience appropriate to the work described herein and all key work personnel demonstrate (s) professional experience well beyond the minimum requirements.
A	The Respondent's resume(s) demonstrate(s) that Respondent has adequate training, educational background and work experience appropriate to the work described herein and all key work personnel demonstrate(s) professional experience that meets or exceeds the minimum requirements.
NA	The Respondent's resume(s) do/does NOT demonstrate that proposer has adequate training, educational background and work experience appropriate to the work described herein.

<b>5.2.4 References</b>	
HA	References demonstrate high competence, responsiveness, creativity, and success in implementing similar programs.
A	References demonstrate adequate competence, responsiveness, creativity, and success in implementing similar programs.
NA	References do NOT demonstrate competence, responsiveness, creativity, and success in implementing similar programs.



<b>5.2.5 Legal Proceedings</b>	
HA	No legal proceedings pending or concluded within the past five (5) years related to the performance of services by the Respondent.
A	Few legal proceedings pending and no legal proceedings concluded adversely to Respondent within the past five (5) years related to the performance of services by the Respondent.
NA	Numerous legal proceedings or any legal proceedings concluded adversely to Respondent within the past five (5) years related to the performance of services by the Respondent.

<b>5.2.6 Optional Services/Extras</b>	
HA	Respondent identifies and has the capability to provide additional and/or alternate elements to expand the scope of services to significantly improve the ability of the City to meet the Program goals stated in Section 1.2
A	Respondent identifies and/or has some capability to provide additional and/or alternate elements to expand the scope of services to improve the ability of the City to meet the Program goals stated in Section 1.2
NA	Respondent does NOT identify and/or does not have the capability to provide additional and/or alternate elements to expand the scope of services to improve the ability of the City to meet the Program goals stated in Section 1.2

<b>5.2.7 Qualifications for Implementing Municipal Aggregation</b>	
HA	Respondent demonstrates superior experience in successful development of municipal aggregation programs, particularly in Massachusetts.
A	Respondent demonstrates adequate experience in successful development of municipal aggregation programs.
NA	Respondent does NOT demonstrate adequate experience in successful development of municipal aggregation programs and/or consulting engagements did not result in implementation of a municipal aggregation program, or had a municipal aggregation program which was terminated

<b>5.2.8 Technical Approach: Mechanisms for Achieving Renewable Energy Additionality</b>	
HA	Respondent provides highly convincing strategy for achieving additionality and provides strategy(ies) with broad applicability to the City.
A	Respondent provides convincing strategy for achieving additionality but provides strategy(ies) without broad applicability to the City.

NA	Respondent provides non-convincing strategy for achieving additionality.
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**5.2.9 Technical Approach to Implementing the Scope of Services**

HA	Proposal demonstrates a superior approach to the subject material.
A	Proposal demonstrates a good approach to the subject material.
NA	Proposal does NOT demonstrate an adequate approach to the subject material.

**5.2.10 Technical Approach: Procurement of Electricity**

HA	Respondent provides methodology that is objective, transparent and succinctly rates electrical supplier 3rd party supplier offers.
A	Respondent provides reasonably objective and understandable methodology, and somewhat clearly rates electrical supplier 3rd party supplier offers.
NA	Respondent does not provide objective, easily understandable methodology and/or does not clearly rate electrical supplier 3rd party supplier offers.

**5.2.11 Technical Approach: Education, Enrollment and Public Support**

HA	Proposal demonstrates a superior tailored approach to Program implementation relating to communication, education and building support for Boston residents and small businesses. It includes superior approach to the public engagement process.
A	Proposal demonstrates a good approach to Program implementation relating to communication, education and building support. It includes good approach to the public engagement process.
NA	Proposal does NOT demonstrate an adequate approach to Program implementation relating to communication, education and building support.