REQUEST FOR QUOTATIONS NO. PSC-20-15

TECHNICAL CONSULTING SERVICES TO ADVISE THE COMMISSION ON
ISSUES RELATED TO FORMAL CASE 1050

Issue Date: February 6, 2020

Due Date: February 20, 2020
No later than 4:00 PM Eastern Standard Time

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Public Service Commission of the District of Columbia
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A. SCOPE OF WORK

The Public Service Commission of the District of Columbia (Commission) seeks a Contractor to provide technical consulting services to the Commission on Formal Case No. 1050/RM9/RM40 – small generator interconnection standards and related matters.

The scope of work includes two specific areas:

(1) Revision of Interconnection/CREF/Net metering rules as a result of Working Group discussions; and
(2) Incorporating energy storage into the Interconnection/CREF/NEM rules.

A.1 Introduction:

On October 18, 2018, the Commission issued the first notice for FC1050/RM9/RM40 technical conference and according to Order No. 19676 and this notice, a new Working Group was established to: (1) address system upgrade costs related to the interconnection of community renewable energy facilities; (2) review the Commission’s NEM rules and propose Community Renewable Energy Facilities (CREF) specific rule changes for the Commission’s consideration and (3) consider whether the generation threshold for NEM systems for individual behind-the-meter generators should be increased beyond 100 percent of the customer’s historical usage. The Working Group has met 5 times so far and the meeting minutes can be found on the Commission website. The Commission plans to have further meetings on these 3 subjects and the final goal is to: (a) revise CREF/NEM rules to resolve the timeline and other issues for CREF interconnection; (b) consider socialization of part of the interconnection costs for CREF and; (c) consider revising NEM rules so that a more appropriate screening qualification can be adopted. Furthermore, the IREC (2019) rules were released in September 2019 and when revising our rules further, the IREC updated rules should be considered.

The second issue, the incorporation of storage facilities in the DG interconnection process, was raised by DC Department of Energy and Environment (DOEE) during the grid modernization proceedings, regarding The Commission has defined energy storage as follows:

“Energy storage” – A resource capable of absorbing electric energy from the grid, from a behind-the-meter generator, or other DER, storing it for a period of time and thereafter dispatching the energy for use on-site or back to the grid, regardless of where the resource is located on the electric distribution system. These resources include all types of energy storage technologies, regardless of their size, storage medium (e.g., batteries, flywheels, electric vehicles, compressed air), or operational purpose. (See NOFR in FC1130, RM-09-2017-01 and RM-40-2017-01)

A.2 Requirements

The Contractor shall provide the following services:

a) The Contractor shall assist the Commission and Staff in the review of D.C. specific interconnection rules and issues related to CREF and Small Generator Interconnection as a result of Working Group discussions.

b) The Contractor shall assist in incorporating energy storage into the Small Generator Interconnection rules and Net Metering rules for Small Generators,

c) The Contractor shall assist the Commission and staff in answering the following questions:

1. What is the best way to specifically call-out storage as a technology that is covered under the interconnection rules?
2. How should the minimum load screen be amended to treat solar projects without storage versus projects with a storage component?
3. Do the interconnection levels need to be updated to incorporate DER systems with a storage component? Should non-exporting systems be exempt under certain conditions?
4. How should the net generating capacity of an exporting DER system that includes storage be calculated from a hosting capacity standpoint?
5. Will the net metering eligibility criteria need to be amended when an eligible renewable energy system has a storage component?
6. How should the net metering rules be updated to reflect projects with a storage component, to ensure that only renewable energy export is covered? What is the best way to account for net metering credits (i.e. separate meter, estimates, etc.)?
7. What rules should be in place to govern unintended export from battery storage?
8. Which standards should storage devices be subject to (IEEE 1547-2018, UL Power Control Systems Certification Requirements, etc.)?
9. What’s the best way to leverage the independent interconnection certification program of the IEEE STD 1547? This interconnection certification captures the modes of operation of the proposed DER system and can significantly streamline the review process of

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2 Some states set the minimum load screens at different times of day depending on what type of device or system is being interconnected.
PV/Battery facilities. Battery capacity that is constrained to backup applications should not be considered in any review/supplementary.

10. What are the implications on deployment of some smart inverter functionality (IEEE 1547-2018 Standard) for interconnection and energy storage?

11. What is the best way to amend the rules to treat storage and advanced inverters as a potential alternative to the traditional back-bone upgrades required for DER interconnection?

12. When adding storage to an existing solar facility, should the request to add storage get expedited treatment, or should it go back to the interconnection queue?

13. Whether and how to meter the solar and storage facility separately when they are behind one inverter?

14. What is the Energy Storage impact on GHG reductions?

15. Should net metering rates be revised as a result of introducing energy storage?

16. Are there best practices from other states we can follow?

17. How should the rules or interconnection contracts be updated to cover islanding for storage systems during grid outages?

18. How should storage be treated as a new “load” from the perspective of the EDS and what is the best way to avoid double-counting (as both load and generation)?

d) The Contractor shall review the Working Group meeting minutes and advise the Commission and Staff regarding any necessary changes of the interconnection and net metering rules.

e) The Contractor shall participate in working group meetings and technical conferences, when requested.

f) The Contractor shall prepare analytical advisory memoranda as assigned.

g) The Contractor shall advise the Commission’s technical and legal staff in drafting orders in this proceeding; conferring with the Commissioners and Staff, as necessary; which includes reviewing all relevant filings in this proceeding, including, but not limited to quotes, comments, motions, testimony and responses.

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3 For example, for storage facilities, Minnesota Commission requires a specific form to be filed out for applying for interconnection. Multiple states and the FERC SGIP specifically call out storage in their interconnection rules and have specific defined processes for determining net generating capacity for projects with a storage component.
h) The Contractor shall attend working group meetings and technical conferences, as needed under the direction of the Commission.

k) The Contractor shall research issues as reflected in this scope of work.

B. **CONTRACT TERM**

It is anticipated that the contract term will be (twelve months from date of contract award, with two (2) one-year options to extend the term of the contract. This contract is not to exceed thirty-six (36) months.

C. **TYPE OF CONTRACT**

The contract resulting from this RFQ will be time and expenses with a fixed hourly rate.

D. **EVALUATION AND AWARD CRITERIA**

D.1 **Evaluation Process**

The Commission will award the contract to the Offeror whose submission, in light of all factors, is most advantageous to the Commission. Each Offeror will be evaluated in accordance with the Evaluation Criteria listed below, the procedures set forth in this RFQ and the Commission’s procurement regulations.

D.2 **Evaluation Committee**

Each submission shall be evaluated by an Evaluation Committee in accordance with the Evaluation Criteria. The Evaluation Committee shall prepare a written report summarizing its findings and submit the same to the selection official(s). The selection official will consider the report prepared by the Evaluation Committee, in making an award decision.

D.3 **Submission Evaluation**

Each submission will be scored on a scale of 1 to 100 points. In addition, Offerors will be eligible to receive up to 12 preference points for participation by Local, Small or Disadvantaged Business Enterprises. Thus, the maximum number of points possible is 112.

The Commission will use the following technical rating scale as a guide when assigning the final total technical points to each Offeror’s submission:
Technical Rating Scale

<table>
<thead>
<tr>
<th>Numerical Point Rating</th>
<th>Rating</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 - 59</td>
<td>Unacceptable</td>
<td>Fails to meet minimum requirements, major deficiencies</td>
</tr>
<tr>
<td>60 - 69</td>
<td>Poor</td>
<td>Marginally meets minimum requirements, significant deficiencies</td>
</tr>
<tr>
<td>70 – 79</td>
<td>Acceptable</td>
<td>Meets requirements, only minor deficiencies.</td>
</tr>
<tr>
<td>80 – 89</td>
<td>Good</td>
<td>Meets requirements, no deficiencies.</td>
</tr>
<tr>
<td>90 – 100</td>
<td>Excellent</td>
<td>Exceeds most, if not all requirements, no deficiencies.</td>
</tr>
</tbody>
</table>

D.4.1 Experience & Past Performance (35 points)

Offerors will be evaluated based on the demonstrated experience, qualifications, capabilities, and quality of past performance in completing projects of similar scope and complexity to that required by Section A of this RFQ.

Offerors shall list all projects that the Offeror has completed in the last 5 years that are similar to this scope of work with descriptions that best illustrate the Offeror’s relevant experience and capabilities. In addition, identify any personnel who were assigned to those projects, who are proposed to provide services required under this RFQ. Offeror shall provide at a minimum the following verifiable information:

1. Project name and location
2. Name, address, contact person, and telephone number of reference contact
3. Description of the work performed by the Offeror
4. Time period
5. Identification of Offeror’s personnel involved who are proposed as key personnel for this RFQ
6. Offerors shall return a completed Past Performance Evaluation Form Attachment D for each project.
D.4.2 **Key Personnel (15 points)**

Offerors will be evaluated on the experience and qualifications of the key individuals assigned to this project. Offerors shall identify the persons who will perform the work described in this RFQ and provide a detailed resume for each individual that describes the experience and qualifications applicable to the performance of the tasks for which they would be responsible.

Please include an organizational chart showing reporting relationships of team personnel. Offerors shall designate one individual as the Project Manager and this person shall be responsible for project management, reporting, coordination, and accountability for the entire project. The Commission must be notified of changes to the personnel assigned to work on this project(s).

D.4.3 **Technical Approach (30 points)**

The Offeror must describe clearly, specifically, and as completely as possible the details for carrying out the responsibilities of the duties associated with the Scope of Work contained in Section B.2 of this RFQ, including a mechanism and timeline for all deliverables. The submission must include a schedule that identifies key milestones, tasks, activities, and events pertinent to the tasks outlined in this RFQ.

Offerors must provide a Key Personnel Resource Schedule which shows the level of effort by number of hours and position that the Offeror believes will be necessary to support its proposed work plan. This Key Personnel Resource Schedule will be evaluated to determine whether the Offeror fully understands the project and has allocated appropriate resources for this project.

D.4.4 **Price (20 points)**

Offerors are required to quote fixed hourly rates and an estimated price for the Base Year as indicated on Attachment A.

The Commission may evaluate each Offeror’s price against its technical submission to determine which combination of price and technical merit is most advantageous to the Commission.

D.5 **Written or Oral Discussions**

Section 2202.12 of the Commission’s procurement regulations permits the Contracting Officer to conduct oral discussions with Offerors that tender submissions.
D.5.1 **Award Without Discussions**

The Commission may award the prospective contract without either written or oral discussions. Therefore, each Offeror is advised that it should submit a complete and thorough submission that is fully compliant with the instructions in this RFQ.

D.5.2 **Written or Oral Discussions**

If the Contracting Officer elects to hold discussions with Offerors, then a competitive range will be established based on the evaluation criteria set forth in this RFQ. Upon completion of discussions, the Contracting Officer will issue to all Offerors in the competitive range a request for best and final offers. After receipt of best and final offers, the Contracting Officer will not reopen discussions unless it is clearly in the best interest of the Commission to do so.

D.6 **Retention of Submissions**

All submissions shall be retained by the Commission and therefore shall not be returned to the Offerors.

D.7 **Examination of Submissions**

Offerors are expected to examine the requirements of all instructions (including all amendments, addenda, attachments and exhibits) in this RFQ. Failure to do so shall be at the sole risk of the Offeror and may result in disqualifications.

D.8 **Late Submissions: Modifications**

Any submission or best and final offer received at the office designated in this RFQ after the exact time specified for receipt shall not be considered. Any modification of a submission, including a modification resulting from the Contracting Officer’s request for best and final offers, is subject to the same condition.

The only acceptable evidence to establish the time of receipt at the Commission is the time-date stamp of the Commission on the submission cover page or other documentary evidence of receipt maintained by the Commission. Notwithstanding any other provisions of this RFQ to the contrary, a late modification of an otherwise successful submission that makes the terms more favorable to the Commission may be considered at any time it is received and may be accepted.

Submissions shall be irrevocable and remain in full force and effect for a period not less than 120 days after receipt of submissions.
D.9 **No Compensation for Preparation of Submissions**

The Commission shall not bear or assume any financial obligation or liability regarding the preparation of any submissions in response to this RFQ or prepared in connection therewith, including but not limited to any submissions, statements, reports, data, information, materials or other documents or items.

D.10 **Rejection of Submissions**

The Commission reserves the right, in its sole discretion:

1. To cancel this solicitation or reject all submissions.
2. To reject submissions that fail to prove the Offeror's responsibility.
3. To reject submissions that contain conditions and/or contingencies that, in the Commission's sole judgment, make the submission indefinite, incomplete, otherwise non-responsive, or otherwise unacceptable for award.
4. To waive minor irregularities in any submission provided such waiver does not result in an unfair advantage to any Offeror.
5. To take any other action within the applicable procurement regulations or law.
6. To reject the submission of any Offeror that has submitted a false or misleading statement, affidavit or certification in connection with such submission or this RFQ.

E. **RFQ ORGANIZATION AND SUBMISSION**

This section outlines specific information necessary for the proper organization of the Offeror's submission and manner in which the submission should be proffered.

E.1 **Submission Identification**

Submissions shall be submitted as one (1) original and three (3) copies, and each Offeror's submission shall be placed in a sealed envelope conspicuously marked: "Submission in Response to RFQ No. PSC-20-15: Technical Consulting Services to Advise the Commission on Issues Related to Formal Case 1050”

E.2 **Delivery or Mailing of Submissions**

Submissions shall be delivered or mailed to:
E.3 **Date and Time for Receiving Submissions**

Submissions shall be received no later than 4:00 p.m., EST, February 20, 2020. Offerors assume the sole responsibility for timely delivery of their submission, regardless of the method of delivery.

E.4 **Submission Size, Organization and Offeror Qualifications**

All submissions shall be submitted on 8-1/2” x 11” paper and typewritten. Telephonic, email, telegraphic, and facsimile submissions shall not be accepted. The Commission is interested in a qualitative approach to presentation material. Brief, clear, and concise material is more desirable than quantity. The submission shall be organized as follows:

E.4.1 **Table of Contents**

The pages of the submission must be numbered with index tabs included for each section.

E.4.2 **Disclosure Form**

Each Offeror shall submit a Disclosure Statement substantially in the form of Attachment B.

E.4.3 **Executive Summary**

Each Offeror should provide a summary of no more than three pages of the information contained in the following sections.

E.4.4 **General Team Information**

Each Offeror should provide the following information for the principal firm and any subconsultants or joint venture partner firms:

A. Name(s), address(es), and role(s) of each firm (including all sub-consultants)

B. Firm profile(s), including:
   i. Age
ii. Firm history(ies)

iii. Firm size(s)

iv. Areas of specialty/concentration

v. Current firm workload(s) projected over the next six months

vi. Provide a list of any contracts held by the Offeror where the contract was terminated (either for default or convenience). This list should also identify any contracts that resulted in litigation or arbitration between the Owner and the Offeror. If the Offeror has multiple offices, only contracts held by the office submitting this submission need be listed.

C. Corporate Information

Offerors, if incorporated, shall attach to the submission, a current franchise tax Certificate of Good Standing, issued by the District of Columbia Comptroller's Office. Offerors shall provide to the Commission, Offeror's 9-digit Federal Employer's Identification Number (FEI#) or Social Security Number (SSN) if Offeror is an individual. If a domestic corporation, Offerors shall also provide to the Commission the corporation's charter number issued by the District of Columbia Department of Consumer and Regulatory Affairs. If a foreign corporation, Offerors shall also provide to the Commission a copy of a valid Certificate of Authority to do business in the District of Columbia, issued by the District of Columbia Department of Consumer and Regulatory Affairs.

E.4.5 Experience and Past Performance

The Offeror should submit information consistent with the requirements delineated in Section D.4.1.

E.4.6 Key Personnel

The Offeror should submit information consistent with the requirements delineated in Section D.4.2

E.4.7 Technical Approach

The Offeror should submit information consistent with the requirements delineated in Section D.4.3
E.4.8 **Price**

The Offeror shall submit **Attachment A**, Form of Offer Letter. In addition, the Offeror should submit cost information consistent with the requirements delineated in Section D.4.4. **PRICE SUBMISSION INFORMATION SHALL BE SEPARATED FROM TECHNICAL SUBMISSION INFORMATION.**

E.4.9 **Tax Affidavit**

Each Offeror must submit a tax affidavit substantially in the form of **Attachment C**. In order to be eligible for this procurement, Offerors must be in full compliance with their tax obligations to the District of Columbia government.

E.4.10 **Form of Offer Letter**

The prices reflected in Attachment A represent the estimated price for fulfillment of the requirements as described in Section A, titled “Requirements” and fixed unit hourly rates for two (2) twelve (12) month option periods.

F.1 **Contact Person**

Any company or person wishing to obtain clarifying information about this RFQ may submit inquiries *in writing* to:

Karen M. Hester  
Contract Specialist  
Public Service Commission of the District of Columbia  
1325 G Street, N.W. 8th Floor  
Washington, D.C. 20005  
khester@psc.dc.gov

All inquiries must be made on or before **February 12, 2020**, to the attention of Karen M. Hester at the above-stated Commission's office or email address. RFQ No. PSC-20-15, must be identified as the subject.

G. **ANTICIPATED PROCUREMENT SCHEDULE**

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFQ Issuance</td>
<td>February 6, 2020</td>
</tr>
<tr>
<td>Deadline for RFQ questions</td>
<td>February 12, 2020</td>
</tr>
<tr>
<td>Responses to questions</td>
<td>February 14, 2020</td>
</tr>
<tr>
<td>Deadline for submission</td>
<td>February 20, 2020</td>
</tr>
<tr>
<td>Contract Executed</td>
<td>March 6, 2020</td>
</tr>
</tbody>
</table>
The Offeror’s Quote is based on and subject to the following conditions:

1. The Offeror agrees to hold its quote open for a period of at least one hundred twenty (120) days after the RFQ closing date.

2. Assuming the Offeror is selected by the Commission and subject only to the changes requested in paragraph 5, the Offeror agrees to enter into a contract with the Commission on the terms and conditions described in the RFQ Documents within ten (10) days of the notice of the award.

3. Both the Offeror and the undersigned represent and warrant that the undersigned has the full legal authority to submit this Quote form and bind the Offeror to the terms of the Quote. The Offeror further represents and warrants that no further action or approval must be obtained by the Offeror in order to authorize the terms of the Quote.

4. The Offeror and its principal team members hereby represent and warrant that they have not: (i) colluded with any other group or person that is submitting a quote in response to the RFQ in order to fix or set prices; (ii) acted in such a manner so as to discourage any other group or person from submitting a quote in response to the RFQ; or (iii) otherwise engaged in conduct that would violate applicable anti-trust law.

5. This Quote is being submitted on behalf of [INSERT FULL LEGAL NAME, TYPE OF ORGANIZATION, AND STATE OF FORMATION FOR THE OFFEROR].

Sincerely,

By: ______________________
Name: ____________________
Its: ______________________
Date: ____________________