

# Association of Bay Area Governments

## Executive Board

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November 17, 2022

Agenda Item 6.d.

### Bay Area Regional Energy Network (BayREN)

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#### Subject:

Approval of three firms for placement on the Evaluation, Measurement & Verification Bench for the Bay Area Regional Energy Network: Grounded Research and Consulting, LLC; Tierra Resource Consultants; and, Industrial Economics, Inc.; and authorization to negotiate and enter into contract(s) with bench firm(s) for evaluation, measurement and verification studies and services, provided the term of any one contract is within the time period from January 1, 2023 through December 31, 2024, and the amount of any one contract and the cumulative amount of all contracts does not to exceed \$586,000

#### Background:

Since 2013, BayREN has implemented a portfolio of energy efficiency programs across the region. The Association of Bay Area Governments (ABAG) serves as the program administrator and lead agency for a 10-member unincorporated association of local government entities.

On May 31, 2018, the California Public Utilities Commission (CPUC) issued Decision 18-05-041<sup>1</sup> which among other things, authorized funding for BayREN through 2025, allowed for modifications to the existing portfolio, and increased the portfolio's total and annualized budget. PG&E – as directed by the CPUC – is the fiscal agent for BayREN. The CPUC has also allowed PG&E and BayREN to negotiate contract terms independent of the CPUC. ABAG and PG&E have a contract for funding through December 2023 or FY 2023-24. The overall BayREN budget is developed each calendar year and the contracts have historically been amended on an annual basis or as needed.

As a Program Administrator of ratepayer funded energy programs, BayREN is authorized to conduct evaluation, measurement, and verification (EMV) studies of its programs, processes and other aspects related to administration of energy efficiency programs. Further, EMV consultants are authorized to conduct market research, focus groups, and other activities to understand if BayREN programs are serving those they intend to serve. BayREN also needs professional services to help develop compliance metrics as well as assistance with ensuring proper reporting of said metrics.

On August 30, 2022, ABAG released a Request for Qualifications (RFQ) seeking Statements of Qualification (SOQ) to provide Evaluation, Measurement & Verification (EMV) Studies and Support. The scope of services sought included conducting process evaluations, evaluability studies to ensure proper collection of program data, market studies to understand gaps in the market and how to better serve target audiences, and assistance with metrics tracking and development. The minimum qualifications for eligibility were experience conducting EMV studies

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<sup>1</sup> <http://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M215/K706/215706139.PDF>

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of energy efficiency programs approved by the CPUC, experience conducting EMV studies of local government activities, knowledge of EMV methodologies for both impact and process evaluations, and experience with project management throughout the process to ensure that study results are accurate and delivered in a timely matter. The term of the Bench is through December 31, 2024, with an option to extend the period for an additional two years to December 31, 2026.

An email advertising the RFQ was sent to 5,496 individuals/firms and was on the ABAG website. On September 22, 2022, ABAG received three SOQ. A review panel consisting of ABAG staff, and one outside panelist reviewed the submissions. The evaluation criteria – with a total of 100% - is listed below in descending order of importance:

1. EMV experience related to energy efficiency programs approved by the CPUC (30%)
2. Expertise of the personnel assigned to the project (30%)
3. Hourly rates (30%)
4. Communications (10%)

All three SOQs were determined to meet the Minimum Qualifications. Grounded Research and Consulting, LLC, a small, women owned firm, received the highest score from the reviewing committee (92/100), followed by Tierra Resource Consultants (84/100) and followed by Industrial Economics, Inc. (76/100). The evaluation committee recommends that these three firms be included on the Bench as they all demonstrated the requisite level of EMV expertise.

Any firms on the Bench will be eligible for work throughout the life of the Bench. Selection for entry into a contract with one of the pre-qualified consultants may take place by direct selection or via a mini-procurement, pursuant to ABAG's Third-Party Contracting Policies and Procedures. Additional firms may be added to the Bench in response to re-issuance of the RFQ in later cycles given certain conditions.

Contract periods of performance and amounts will be determined on a pre-contract basis based on the project solicited to the Bench. The amount included for this program in the proposed FY 2022-2023, FY 2023-24 and FY 2024-25 budget will be determined on a per-contract and project basis. Based on current contract amounts for this scope of services, staff estimates the costs of needed services at \$293,000 annually through 2024.

#### Issues:

None

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**Recommended Action:**

The ABAG Executive Board is requested to authorize awarding three firms with placement on the Evaluation, Measurement & Verification Studies and Support Services for the Bay Area Regional Energy Network (BayREN) Bench: Grounded Research and Consulting, Inc.; Tierra Resources Consultants; and Industrial Economics, Inc., and to authorize the Executive Director of the Metropolitan Transportation Commission, or her designee, on behalf of the Association of Bay Area Governments and the Bay Area Regional Energy Network, to negotiate and enter into one or more contract(s) with bench firm(s) for evaluation, measurement and verification studies and support, provided the term of any one contract is within the time period from January 1, 2022 through December 31, 2024, and the amount of any one contract and the cumulative amount of all contract(s) does not exceed \$586,000.

**Attachments:**

- A. Summary Approval – Bench

**Reviewed:**



Therese W. McMillan