

State of Maine
Master Score Sheet

RFP# 202312248									
Evaluating the Establishment of a Distribution System Operator in Maine									
Bidder Name:		Agile Fractal Grid	DNV Energy Insights USA Inc.	Energy and Environmental Economics, Inc.	Electric Power Engineers	Guide house	London Economics International	Power Advisory	Strategen
Proposed Cost:		\$191,800	\$245,370	\$321,237	\$250,115	\$397,400	\$225,886	\$197,650	\$214,996
Scoring Sections	Points Available								
Section I: Preliminary Information	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Section II: Organization Qualifications and Experience	35	15	33	25	25	27	30	23	32
Section III: Proposed Services	40	25	34	33	30	28	35	34	36
Section IV: Cost Proposal	25	25	19.5	14.9	19.2	12.1	21.2	24.3	22.3
TOTAL	<u>100</u>	<u>65</u>	<u>86.5</u>	<u>72.9</u>	<u>74.2</u>	<u>67.1</u>	<u>86.2</u>	<u>81.3</u>	<u>90.3</u>

Award Justification Statement
RFP# 202312248 Evaluating the Establishment of a Distribution System
Operator in Maine

I. Summary

The Governor's Energy Office (GEO), as directed by the Legislature,¹ is seeking proposals for an assessment of whether a Distribution System Operator (DSO) could be established in Maine to achieve energy cost savings for customers, improved system reliability, and achievement of the State's climate goals and growth of distributed energy resources. The purpose of the Distribution System Operator Study ("Maine DSO Study" or "DSO Study") is to evaluate the potential costs and benefits of establishing a Distribution System Operator in the state pursuant to Resolves 2023, chapter 67, Resolve, to Create a 21st-Century Electric Grid, ("the Resolve") enacted by the Maine Legislature in June 2023 with an effective date of October 25, 2023. As defined by the Legislature, the DSO is an entity designed to oversee integrated system planning and operate all electric grids in the State, administer an open and transparent market for distributed energy resources, and facilitate the achievement of the greenhouse gas reduction obligations and climate policies. The DSO's purpose would be to ensure all electric grids in Maine are operated to optimize efficiency, equity, reliability, and customer service.

Part I of the DSO Study will assess whether a DSO could be designed to achieve cost savings for customers, improved system reliability, and accelerated achievement of the State's climate goals and growth of distributed energy resources. Part I will entail discovery, stakeholder engagement, and analysis.

If the GEO determines, based on Study Part I, that a DSO could achieve those three objectives, the GEO will authorize the successful bidder to proceed with DSO Study Part II, in accordance with the requirements in Sections 3 and 4 of the Resolve.

II. Evaluation Process

Responses were provided to the RFP Coordinator on February 5th and then distributed by the RFP Coordinator the three additional members of the evaluation team for individual review. The evaluation team members met for team review on February 9th and February 13th.

Evaluators were selected for their qualifications and expertise related to transmission and distribution system planning.

III. Qualifications & Experience

¹ Resolves 2023, chapter 67

The bidders that scored higher in this section demonstrated the following qualification and experience factors:

- Direct and demonstrated experience related to services proposed
- Capacity to deploy proposed services
- Organizational longevity

IV. Proposed Services

The bidders that scored higher in this section demonstrated the following in their proposed services:

- Fully addressed each section of requested information
- Strength of description of implementation pathway that expanded upon information present in the RFP
- Thoughtfulness of community engagement approach

V. Cost Proposal

The cost proposal was scored as indicated in Section 5b of the RFP. The highest overall scoring bidder had the third highest score on cost proposal, indicating the third-lowest proposal.

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Section IV: Cost Proposal	25	25	19.5	14.9	19.2	12.1	21.2	24.3	22.3
TOTAL	<u>100</u>	<u>65</u>	<u>86.5</u>	<u>72.9</u>	<u>74.2</u>	<u>67.1</u>	<u>86.2</u>	<u>81.3</u>	<u>90.3</u>

VI. Conclusion

Out of 100 possible points, Strategen scored 90.3, which was the highest point total awarded by the Evaluation Team. The strengths of Strategen's proposal include a strong project team with relevant experience including DSO evaluation and implementation, grid operations familiarity, grid architecture evaluation and development, and familiarity with Maine. Strategen also included a complete proposed scope of service, and a competitive cost proposal. The Evaluation Team has determined the proposal submitted by Strategen represents the best value to the State of Maine.



STATE OF MAINE
Governor's Energy Office

Janet T. Mills
Governor

Dan Burgess
Director

March 7, 2024

Agile Fractal Grid
116 Main Street
Medway, MA, 02053

SUBJECT: Notice of Conditional Contract Awards under RFP #202312248,
Evaluating the Establishment of a Distribution System Operator in Maine

Dear John Reynolds:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Governor's Energy Office for Evaluating the Establishment of a Distribution System Operator in Maine. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract awards to the following bidder:

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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 black ink, appearing to read "Ethan Tremblay". The signature is stylized with a large, looped "E" and a long, sweeping underline.

Ethan Tremblay
Policy and Markets Program Manager
Governor's Energy Office
ethan.tremblay@maine.gov

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
Governor's Energy Office

Janet T. Mills
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Dan Burgess
Director

March 7, 2024

DNV Energy Insights USA Inc.
1400 Ravallo Dr
Katy, TX 77449

SUBJECT: Notice of Conditional Contract Awards under RFP #202312248,
Evaluating the Establishment of a Distribution System Operator in Maine

Dear Kristina Kelly:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Governor's Energy Office for Evaluating the Establishment of a Distribution System Operator in Maine. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract awards to the following bidder:

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Ethan Tremblay
Policy and Markets Program Manager
Governor's Energy Office
ethan.tremblay@maine.gov

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STATE OF MAINE
Governor's Energy Office

Janet T. Mills
Governor

Dan Burgess
Director

March 7, 2024

Energy and Environmental Economics, Inc
44 Montgomery Street, Suite 1500
San Francisco, CA 94104

SUBJECT: Notice of Conditional Contract Awards under RFP #202312248,
Evaluating the Establishment of a Distribution System Operator in Maine

Dear Eric Cutter:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Governor's Energy Office for Evaluating the Establishment of a Distribution System Operator in Maine. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract awards to the following bidder:

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Ethan Tremblay
Policy and Markets Program Manager
Governor's Energy Office
ethan.tremblay@maine.gov

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STATE OF MAINE
Governor's Energy Office

Janet T. Mills
Governor

Dan Burgess
Director

March 7, 2024

Electric Power Engineers
13001 W. Highway 70, Suite G100
Austin, Texas, 78738

SUBJECT: Notice of Conditional Contract Awards under RFP #202312248,
Evaluating the Establishment of a Distribution System Operator in Maine

Dear Hugo Mena:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Governor's Energy Office for Evaluating the Establishment of a Distribution System Operator in Maine. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract awards to the following bidder:

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Ethan Tremblay
Policy and Markets Program Manager
Governor's Energy Office
ethan.tremblay@maine.gov



STATE OF MAINE
Governor's Energy Office

Janet T. Mills
Governor

Dan Burgess
Director

March 7, 2024

Guidehouse Inc
1676 International Drive, Suite 800
McLean, VA 22012

SUBJECT: Notice of Conditional Contract Awards under RFP #202312248,
Evaluating the Establishment of a Distribution System Operator in Maine

Dear Eliana Albelbaisi:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Governor's Energy Office for Evaluating the Establishment of a Distribution System Operator in Maine. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract awards to the following bidder:

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Ethan Tremblay
Policy and Markets Program Manager
Governor's Energy Office
ethan.tremblay@maine.gov

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STATE OF MAINE
Governor's Energy Office

Janet T. Mills
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Dan Burgess
Director

March 7, 2024

London Economics International, LLC
717 Atlantic Avenue, Suite 1A
Boston, MA 02111

SUBJECT: Notice of Conditional Contract Awards under RFP #202312248,
Evaluating the Establishment of a Distribution System Operator in Maine

Dear Marie Fagan:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Governor's Energy Office for Evaluating the Establishment of a Distribution System Operator in Maine. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract awards to the following bidder:

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Governor's Energy Office
ethan.tremblay@maine.gov

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STATE OF MAINE
Governor's Energy Office

Janet T. Mills
Governor

Dan Burgess
Director

March 7, 2024

Power Advisory
22 Devens Street
Concord, Massachusetts, 01742

SUBJECT: Notice of Conditional Contract Awards under RFP #202312248,
Evaluating the Establishment of a Distribution System Operator in Maine

Dear Sarah Simmons:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Governor's Energy Office for Evaluating the Establishment of a Distribution System Operator in Maine. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract awards to the following bidder:

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STATE OF MAINE
Governor's Energy Office

Janet T. Mills
Governor

Dan Burgess
Director

March 7, 2024

Strategen Consulting, Inc
10265 Rockingham Dr.
Sacramento, CA 95827

SUBJECT: Notice of Conditional Contract Awards under RFP #202312248,
Evaluating the Establishment of a Distribution System Operator in Maine

Dear Matt McDonnell:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Governor's Energy Office for Evaluating the Establishment of a Distribution System Operator in Maine. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract awards to the following bidder:

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Governor's Energy Office
ethan.tremblay@maine.gov

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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Agile Fractal Grid

DATE: 2/9/24

SUMMARY PAGE

Department Name: Governor's Energy Office

Name of RFP Coordinator: Claire Swingle

Names of Evaluators: Robert Snook, Allie Rand, Ethan Tremblay, Claire Swingle

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	15
Section III. Proposed Services	40	25
Section IV. Cost Proposal	25	25
<u>Total Points</u>	<u>100</u>	<u>65</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Agile Fractal Grid

DATE: 2/9/24

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

A. Complete

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Agile Fractal Grid

DATE: 2/9/24

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	35	15

Evaluation Team Comments:

- I. Overview of the Organization
 - Community of practice with IT and energy consulting experts
 - Bidder does not demonstrate that this team has successfully completed a project of this scope and nature
- II. Subcontractors
 - TeMix – Ed Cazalet (board of directors at CAISO, DSO work in California, transactive energy)
 - Tenaska Power Services – energy management services for 7,580MW of generation, deep understanding of energy markets
 - Dragos – cybersecurity
 - CMG – planning and implementation
 - DRG Technical Solutions – system planning, T&D engineering, engineering and operations support for Duke Energy, AEG, etc.
 - Open Access Technology International, Inc- software to connect resources to wholesale energy markets, optimize power supply management efforts, services used by over 90% of utilities in the U.S.
- III. Organizational Chart
 - Provided, with staff and topic area identified for each subcontractor
 - Subcontractors with equal weighting, not clear what the role of the subcontractors will be within this scope of work
- IV. Litigation
 - No litigation identified
- V. Certificate of Insurances
 - Not included
- VI. Past Projects

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Agile Fractal Grid

DATE: 2/9/24

- Overall, projects demonstrate familiarity with the landscape of grid management, but not experience in evaluating, designing, or implementing a DSO, especially for primary contractor. No experience in Maine noted.
- IBM
 - i. Broadband assessments/engineering designs
- Southern California Edison
 - i. TeMix/Ed Cazalet: developed market design and cloud platform used by SCE in CalFUSE Dynamic Pricing Project
- North Carolina Electric Membership Corporation
 - i. OATI: NCEMC started with implementation of the OATI DSO solution platform (DERMS)

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Agile Fractal Grid

DATE: 2/9/24

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section III. Proposed Services	40	25

Evaluation Team Comments:

I. Proposed Services

A. DSO Study Part I Discovery

- Review Maine, ISO-NE and NMISA specific literature, including utility data, operations/planning handbooks and forecasts, etc,
- Aligned with RFP discovery tasks
- Incorporate stakeholder feedback into prioritization process
- Prioritization workshop
- Findings will be maintained in a living Requirements Register for prioritization
- Create preliminary concept of financial estimates of DSO (design-operation) part of programmatic plan for selected conceptual option

B. DSO Study Part I Stakeholder Engagement

- Aligned with RFP stakeholder tasks
- 4 Charettes with utilities, large companies and building facilities, government offices and transportation, consumer activist groups, educational institutions
- 2 webinars
- Individual interviews with key stakeholders

C. DSO Study Part I Assessment

- Develop key assumptions/criteria to solicit feedback
- Builds off four main responsibilities of DSO in RFP
- Proposes analyses that may be beyond the scope of the RFP, including proposing to construct a digital twin
- Reference using national lab partners (not listed as subcontractors)
- Overall, a lack of understanding by review team of methodology for assessment that meets the requirements of the RFP

D. DSO Study Part I Deliverables

- Complete, aligned with RFP requirements

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Agile Fractal Grid

DATE: 2/9/24

- Provided outline of the report
- E. DSO Study Part II
 - Yes, bidder confirms ability.
- F. Implementation – Work Plan
 - Finalize by October/November 2024
 - Gaant chart of activities provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Agile Fractal Grid

DATE: 2/9/24

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$191,800	,	\$191,800	x	25 points	=	25

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: DNV

DATE: 2/9/24

SUMMARY PAGE

Department Name: Governor's Energy Office

Name of RFP Coordinator: Claire Swingle

Names of Evaluators: Robert Snook, Allie Rand, Ethan Tremblay, Claire Swingle

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	33
Section III. Proposed Services	40	34
Section IV. Cost Proposal	25	19.5
<u>Total Points</u>	<u>100</u>	<u>86.5</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: DNV

DATE: 2/9/24

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

A. Complete

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: DNV

DATE: 2/9/24

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	35	33

Evaluation Team Comments:

- I. Overview of the Organization
 - Offices in US and Canada, over 4000 employees
 - Experience in Maine and New England, and New York
 - Experience developing DSO functions in the U.K (functional specification and implementation roadmap)
- II. Subcontractors
 - None
- III. Organizational Chart
 - Included with names identified, including Stakeholder engagement specialists
 - Strong technical expertise
- IV. Litigation
 - Included statement that no litigation that would materially affect ability to perform services under this contract
- V. Certificate of Insurances
 - Included, \$6M general liability
- VI. Past Projects
 - Overall, projects are highly relevant and demonstrate bidder's technical capabilities, familiarity with Maine and DSO models
 - OPA's Non-Wires Alternative Coordinator
 - i. Assess NWA T&D projects
 - Great Britain's Energy Networks Association (ENA) DSO Implementation Plan and Roadmap
 - i. Designed DSO implementation and roadmap Jan-June 2020
 - National Grid – DER Integration Strategy
 - i. Evaluated DER integration efforts throughout U.S, Australia, and UK to identify best practices in DER interconnection, valuation, and aggregation; conducted detailed market research and jurisdictional scans related to regulatory approval processes, wholesale market participation, and key program design elements

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: DNV

DATE: 2/9/24

- Additional Projects mentioned:
 - i. USEF design team for roles and responsibilities, market coordination, measurement and settlement
 - ii. Assessing implementation of DSO model in Ontario, including developing generalized DSO models with associated activities, roles, and functions.
 - iii. SMUD IDRP supporting planning (DER forecasting/roadmap, DSP)

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: DNV

DATE: 2/9/24

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section III. Proposed Services	40	34

Evaluation Team Comments:

I. Proposed Services

A. DSO Study Part I Discovery

- Initiation phase to define vision and expectations and develop stakeholder engagement plan
- Establish baseline of Maine energy system, review standards/forecasts, supplemented by stakeholder interviews
- Review DSO models in other jurisdictions, specific to Maine Objectives
- Establish principals to evaluate DSO models for Maine applicability
- Deliverables: presentation and discussion on DSO model assessment, baseline assessment Maine landscape

B. DSO Study Part I Stakeholder Engagement

- Discussion of approach
- Up to 10 interviews, with interview guide, transcribe interviews
- Stakeholder list that they will develop and vet by GEO
- Webinars (2) required in RFP
- Deliverables: memo summarizing webinars

C. DSO Study Part I Assessment

- Will take one DSO model that is most applicable to the Maine context based on discovery and stakeholder engagement and perform further assessment, but not clear how they will identify the one DSO model
- Electricity cost
 1. Investment to establish vs. cost savings at T&D levels (based on knowledge of NWA BCA)
 2. AESC, EIA Annual Energy Outlook projected energy prices
 3. Provides qualitative/conceptual table of potential impacts
- System Reliability
 1. Establish baseline of performance including CAID/SAIFI/SAIDI, local system plan/local area studies, etc. to identify gaps and where a DSO model might deliver critical system benefits (mostly qualitative)

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: DNV

DATE: 2/9/24

- State climate goals
 - 1. BAU to compare against DSO
- D. DSO Study Part I Deliverables
 - Complete, affirm all deliverables specified in RFP
 - Assistance to GEO preparing EUT presentation is not included in budget
- E. DSO Study Part II
 - Yes, affirm capabilities thoughtfully
- F. Implementation – Work Plan
 - Gaant chart with staff leads
 - March 15- March 31 2025, timeline may not be compatible with Resolve

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: DNV

DATE: 2/9/24

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
245,370	,	191800	x	25 points	=	19.5

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: E3

DATE: 2/9/24

SUMMARY PAGE

Department Name: Governor's Energy Office

Name of RFP Coordinator: Claire Swingle

Names of Evaluators: Robert Snook, Allie Rand, Ethan Tremblay, Claire Swingle

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	25
Section III. Proposed Services	40	33
Section IV. Cost Proposal	25	14.9
<u>Total Points</u>	<u>100</u>	<u>72.9</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: E3

DATE: 2/9/24

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

A. Complete

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: E3

DATE: 2/9/24

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	35	25

Evaluation Team Comments:

- I. Overview of the Organization
 - Long-standing consultancy founded in 1989 with offices in California, New York, Massachusetts, Alberta, would lead this project out of Massachusetts office
 - Familiarity with Maine (2030 RPS target, Maine Energy Storage Market Assessment)
 - Lighter experience with DSO/new model architecture and integrating with bulk transmission
- II. Subcontractors
 - No subcontractors for Part I
 - Potentially subcontractors for Part II
- III. Organizational Chart
 - Provided, specific staff identified
 - Strong experience, but light with DSO establishment and evaluation
- IV. Litigation
 - Provided statement affirming no litigation
- V. Certificate of Insurances
 - Provided, \$1M general liability for each occurrence
- VI. Past Projects
 - Overall, projects demonstrate understanding of grid operations, developing roadmaps, and DERs, and familiarity with Maine, but there could have been more information on experience with evaluating or establishing DSOs
 - National Grid implementing FERC 2222
 - i. In NYISO, ISONE markets, detailed input on ISO tariff language, processes, procedures,
 - FortisAlberta

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: E3

DATE: 2/9/24

- i. Provided DER integration roadmap considering consumer choice, market design, and technology adoption
- Joint Utilities of New York
 - i. Wrote chapter of Distributed System Implementation Plan for integrating DERs
- Other projects:
 - i. Participating in EPRI TSO & DSO Coordination for DER working groups
 - ii. Past experience working in Maine has been satisfactory

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: E3

DATE: 2/9/24

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section III. Proposed Services	40	33

Evaluation Team Comments:

- I. Proposed Services
 - A. DSO Study Part I Discovery
 - Lit review of Maine policies
 - Relevant DSO models (UK, NY, Australia)
 - Summary deck to be included in final report
 - B. DSO Study Part I Stakeholder Engagement
 - Interview questions developed, interviews
 - Webinars (3)
 - C. DSO Study Part I Assessment
 - Develop assessment framework to meet Objectives
 - Develop BAU counterfactual and enhanced BAU
 - Feasibility/cost studies
 - Consider multiple DSO models, including phased-in approach
 - D. DSO Study Part I Deliverables
 - Complete – report, presentation deck, available to testify before legislature, supporting materials/analyses provided
 - E. DSO Study Part II
 - Yes indicated
 - F. Implementation – Work Plan
 - Complete March 15- March 31 2025
 - September 2024 Analysis expected to be complete

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: E3

DATE: 2/9/24

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$321237	,	\$191800	x	25 points	=	14.9

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: EPE

DATE: 2/9/24

SUMMARY PAGE

Department Name: Governor's Energy Office

Name of RFP Coordinator: Claire Swingle

Names of Evaluators: Robert Snook, Allie Rand, Ethan Tremblay, Claire Swingle

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	25
Section III. Proposed Services	40	30
Section IV. Cost Proposal	25	19.2
<u>Total Points</u>	<u>100</u>	<u>74.2</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: EPE

DATE: 2/9/24

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

A. Complete

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: EPE

DATE: 2/9/24

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	35	25

Evaluation Team Comments:

- I. Overview of the Organization
 - Consultancy firm since 1968, with over 250 staff
 - Expertise in distribution system planning, DER integration, power system modeling
 - Has worked with the Maine PUC
 - Engineering expertise
- II. Subcontractors
 - None specified
- III. Organizational Chart
 - Provided with staff identified
 - Engineering heavy expertise, distribution planning and interconnection; DSO experience not specified
- IV. Litigation
 - No litigation reported
- V. Certificate of Insurances
 - Provided, up to \$2m per occurrence
- VI. Past Projects
 - Overall, projects demonstrate understanding of existing Maine utility operations and landscape, but not experience surrounding DSOs.
 - Maine PUC
 - i. Docket 2021-00039, assessed market/operations/technology upgrades needed in Versant and CMP, which included much stakeholder engagement
 - Deloitte
 - i. Engineering support to determine key performance indicators for Jordan National Electric Power Company
 - Maine PUC
 - i. Support integrated grid planning stakeholder process, during which EPE familiarized itself with Maine state policy, T&D planning processes, etc.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

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DATE: 2/9/24

- Other projects mentioned
 - i. Engineering analysis for developers operating in ISO-NE
 - ii. CMP & Versant budget analysis for Maine PUC

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: EPE

DATE: 2/9/24

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section III. Proposed Services	40	30

Evaluation Team Comments:

- I. Proposed Services
 - A. DSO Study Part I Discovery
 - Comparative analysis with potential goals and criteria, aligned with Resolve
 - Analysis of existing grid, focused on grid integration, including ISO-NE, NMISA, policy objectives
 - Assessment of existing technology deployment
 - B. DSO Study Part I Stakeholder Engagement
 - Work with GEO to identify stakeholders
 - Stakeholder engagement plan development
 - Interviews (unknown number)
 - 2 webinars, including to educate stakeholders about DSO concepts
 - Workshops (unknown number)
 - C. DSO Study Part I Assessment
 - Proposed additional criteria
 - Clear on potential criteria for reduction of electricity costs, improved reliability, and state goals, including DG integration and ISO-NE coordination
 - Evaluating multiple DSO models
 - D. DSO Study Part I Deliverables
 - Final Report, 1 draft iteration for GEO review
 - Only mentioned presentations for webinars
 - Did not mention providing unlocked excel/models
 - E. DSO Study Part II
 - Not mentioned.
 - F. Implementation – Work Plan
 - Gaant chart provided, final report proposed for November 1st
 - Not clear what form interim deliverables would take

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: EPE

DATE: 2/9/24

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$250115	,	\$191800	x	25 points	=	19.2

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Guidehouse

DATE: 2/9/24

SUMMARY PAGE

Department Name: Governor's Energy Office

Name of RFP Coordinator: Claire Swingle

Names of Evaluators: Robert Snook, Allie Rand, Ethan Tremblay, Claire Swingle

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	27
Section III. Proposed Services	40	28
Section IV. Cost Proposal	25	12.1
<u>Total Points</u>	<u>100</u>	<u>67.1</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Guidehouse

DATE: 2/9/24

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

A. Complete

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Guidehouse

DATE: 2/9/24

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	35	27

Evaluation Team Comments:

- I. Overview of the Organization
 - Established consultancy group
 - Indicates experience with FERC 2222 and DERMS capability assessment, utility DER forecasting and strategy development
 - Experience with California Energy Commission, California PUC, NJ BPU
- II. Subcontractors
 - None indicated
- III. Organizational Chart
 - Included with staff identified
 - Technical lead has expertise in DER integration into utility control systems, ADMS, interoperability, IOU systems
 - Management experience more emphasized than subject matter
 - No staff with DSO experience listed
- IV. Litigation
 - No litigation that would materially affect this project was identified
- V. Certificate of Insurances
 - Included, up to \$1 million per occurrence
- VI. Past Projects
 - National Grid/Eversource
 - i. Evaluation of grid modernization investments for MA DPU prudence review, conducted over 8 year period with annual evaluation studies for each – monitoring and control, volt-var optimization, telecommunications, distribution automation, ADMS/advanced load flow, first four years have been filed with DPU
 - Tennessee Valley Authority
 - i. Stakeholder engagement to assess DER enablement, explored changes that would be required to transition, Guidehouse facilitated series of workshops around common vision, future resource planning practices,

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Guidehouse

DATE: 2/9/24

assessed current state planning capabilities, identified gaps, with 10 year roadmap (DER/Load forecasting, DER integration, DER framework/governance)

- Duke Energy
 - i. Supporting FERC 2222 compliance plans – performed current state assessment, gaps, future state mapping (process maps/tools, internal/external coordination and communication process flows, data needs and timelines), assessed market participation model across T&D system interconnection, operations, metering, settlements, tariffs, demand response, cybersecurity (will be completed May 2024)
- Additional Projects:
 - i. National Grid Future Distribution System Orchestrator (DSO) vision – identify strategic options for Western Power Distribution as it adapts to becoming a DSO (workshops, series of strawmen, final strategy paper)
 - ii. NGED DSO to design and trial commercial arrangements to be deployed by the DSO following successful project completion in 2025
 - iii. EirGrid – understand role of TSO managing DER, international benchmark of TSO DSO operating models and recommended one for EirGrid

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Guidehouse

DATE: 2/9/24

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section III. Proposed Services	40	28

Evaluation Team Comments:

- I. Proposed Services
 - A. DSO Study Part I Discovery
 - Review Maine context
 - Interviews with key stakeholders
 - Review other DSO models around the U.S. and Europe, including those identified by GEO
 - Describe characteristics of each DSO model (functions, roles, regulatory considerations, implementation considerations) within Maine context (EDCs, ISO, DSO)
 - Desk Review
 - B. DSO Study Part I Stakeholder Engagement
 - Webinars (2)
 - Interviews
 - Recurring steering committee meetings, though the composition of steering committee is unclear
 - C. DSO Study Part I Assessment
 - Baseline from previous tasks
 - Benefits, costs, and risks of various DSO models in Maine
 - Will develop evaluation criteria to assess DSO models from other jurisdictions
 - Analysis will include: high-level estimates of cost savings, improved reliability, etc. relative to BAU baseline
 - High-level characterization of energy market structure and rate impacts of a DSO
 - Assessment process is unclear to review team
 - D. DSO Study Part I Deliverables
 - Complete
 - EUT presentation not included in proposed scope

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Guidehouse

DATE: 2/9/24

E. DSO Study Part II

- Not addressed

F. Implementation – Work Plan

- Discovery and Assessment expected to be complete in 4 months, July 15 2024
- Gaant chart included

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Guidehouse

DATE: 2/9/24

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$397400	,	\$191800	x	25 points	=	12.1

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: LEI

DATE: 2/13/24

SUMMARY PAGE

Department Name: Governor's Energy Office

Name of RFP Coordinator: Claire Swingle

Names of Evaluators: Robert Snook, Allie Rand, Ethan Tremblay, Claire Swingle

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	30
Section III. Proposed Services	40	35
Section IV. Cost Proposal	25	21.2
<u>Total Points</u>	<u>100</u>	<u>86.2</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: LEI

DATE: 2/13/24

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

A. Complete

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: LEI

DATE: 2/13/24

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	35	30

Evaluation Team Comments:

- I. Overview of the Organization
 - Strategic advisory firm
 - Experience in New England and Maine (Maine PUC, Maine OPA, ISO-NE)
 - DER integration experience
- II. Subcontractors
 - Frontier Economics Ltd (FEL)
 - i. Has DSO conceptualization and implementation experience, including assessing relationship between transmission system operators and distribution owners, practicality of separating asset ownership from system operation for DSOs
 - Specific scope of work of subcontractor is not clear
- III. Organizational Chart
 - Provided, with staff identified
 - Includes NWA expert, stakeholder engagement expert, New England leads, international specialists
 - Not clear from org chart who will be doing what part of the services required under the RFP
- IV. Litigation
 - Attests no ongoing litigation
- V. Certificate of Insurances
 - Provided, \$1M of coverage
- VI. Past Projects
 - Ontario Energy Board
 - i. Developing regulatory reforms; prepared concept paper on approaches to utility remuneration and incentives, including DSO model
 - Maine Public Utilities Commission

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: LEI

DATE: 2/13/24

- i. Analyzed short and long term costs and benefits of LD1646 to establish the Maine Power Delivery Authority – legal, regulatory, technical, financial, and operational issues, anticipated impacts of electricity rates, and developed alternatives
- Maine OPA
 - i. Examined costs and benefits of Maine’s Net Energy Billing program

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: LEI

DATE: 2/13/24

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section III. Proposed Services	40	35

Evaluation Team Comments:

- I. Proposed Services
 - A. DSO Study Part I Discovery
 - Review relevant literature
 - Include relevant information from stakeholder engagement
 - Identify DSO models from other jurisdictions – create inventory of possibilities then select two or three composite models for assessment in Maine
 - Considers equity implications
 - FEL would take the lead on analyzing and summarizing international case studies of DSOs
 - Identifies some data challenges, potential costs and benefits
 - B. DSO Study Part I Stakeholder Engagement
 - One on one interviews
 - At least two public webinars
 - Identifies illustrative group of stakeholders at organization level
 - C. DSO Study Part I Assessment
 - Define baseline status quo conditions
 - Create scenarios of Maine electricity sector evolution to benchmark DSO models
 - Develop evaluative criteria (identifies potential candidates)
 - Identify recommended model (best value) following assessment of multiple with CBA high-level assumptions
 - D. DSO Study Part I Deliverables
 - Complete
 - E. DSO Study Part II
 - No reference.
 - F. Implementation – Work Plan

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: LEI

DATE: 2/13/24

- Provides gaant chart with March 2025 final report deliverable

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: LEI

DATE: 2/13/24

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$225886	,	\$191800	x	25 points	=	21.2

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Power Advisory

DATE: 2/13/24

SUMMARY PAGE

Department Name: Governor's Energy Office

Name of RFP Coordinator: Claire Swingle

Names of Evaluators: Robert Snook, Allie Rand, Ethan Tremblay, Claire Swingle

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	23
Section III. Proposed Services	40	34
Section IV. Cost Proposal	25	24.3
<u>Total Points</u>	<u>100</u>	<u>81.3</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Power Advisory

DATE: 2/13/24

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

A. Complete

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Power Advisory

DATE: 2/13/24

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	35	23

Evaluation Team Comments:

- I. Overview of the Organization
 - Energy sector management consulting firm since 2007
 - Wholesale market design, rate design, social equity
 - New England familiarity
- II. Subcontractors
 - Ignite Energy Solutions (only Terri-Lynn Duque)
 - Primarily involved with stakeholder engagement
- III. Organizational Chart
 - Included with staff identified
 - No staff leads have DSO-specific experience
- IV. Litigation
 - Attests to no litigation
- V. Certificate of Insurances
 - \$2 million professional liability certificate of insurance
 - States that general liability certificate will be provided if awarded
- VI. Past Projects
 - Limited DSO experience
 - Toronto Hydro – development of demand response program rules and T-D coordination protocols
 - Enmax Future Utility Plan – establishment of framework linking activities of future utility to benefits realized by customers, evaluating multiple investments (NWA, grid modernization), prepare roadmap for investment over 8 years
 - Maine PUC contract negotiations with New England Aqua Ventus

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Power Advisory

DATE: 2/13/24

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section III. Proposed Services	40	34

Evaluation Team Comments:

I. Proposed Services

A. DSO Study Part I Discovery

- Review market structures and policy environments for local, state, and regional distribution systems
- Review existing DSO structures
- Describes four main DSO models to consider
- Deliverable is summary report in PowerPoint format outlining findings

B. DSO Study Part I Stakeholder Engagement

- Establish stakeholder engagement plan, interview questions, pre-interview briefing packages to ensure stakeholders are informed
- One on one interviews with stakeholders
- Identified preliminary list of stakeholder organizations
- 2 public webinars
- Deliverable is summary report in powerpoint format outlining findings

C. DSO Study Part I Assessment

- Develop assumptions and scenarios for DSO implementation structures
- Evaluation criteria, with list of proposed criteria
- Establish BAU case
- Multiple models analyzed, with list of metrics

D. DSO Study Part I Deliverables

- Complete, with all deliverables listed in the RFP

E. DSO Study Part II

- Confirms ability.

F. Implementation – Work Plan

- Gaant chart
- February 2025 final deliverable, may not be compatible with Resolve

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Power Advisory

DATE: 2/13/24

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$197650	,	\$191800	x	25 points	=	24.3

Evaluation Team Comments:

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Strategen

DATE: 2/13/24

SUMMARY PAGE

Department Name: Governor's Energy Office

Name of RFP Coordinator: Claire Swingle

Names of Evaluators: Robert Snook, Allie Rand, Ethan Tremblay, Claire Swingle

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)	N/A	N/A
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	35	32
Section III. Proposed Services	40	36
Section IV. Cost Proposal	25	22.3
<u>Total Points</u>	<u>100</u>	<u>90.3</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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DATE: 2/13/24

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

A. Complete

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

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BIDDER: Strategen

DATE: 2/13/24

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

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Organization Qualifications and Experience	35	32

Evaluation Team Comments:

- I. Overview of the Organization
 - Consultancy firm founded in 2005, minority and woman-owned
 - Grid modernization expertise, including DSO models with subcontractors
 - Prior experience with GEO
- II. Subcontractors
 - Energy Catalyst – systems architecture for Australia’s national electricity market
 - Lorenzo Kristov – grid architecture expert, has written extensively on design of DSO
- III. Organizational Chart
 - Provided with staff identified
 - Engineer on the team, Australia systems architect expert, other DSO expert
- IV. Litigation
 - Attests that there is no litigation
- V. Certificate of Insurances
 - Provided; \$2 million for each occurrence
- VI. Past Projects
 - Some Maine involvement, relevant experience, high quality subcontractors
 - NRDC
 - i. Expert witness testimony in Ameren and Commonwealth Edison’s grid plans (grid operations, smart inverter settings, flexible interconnection)
 - Independent Electricity System Operator, Ontario, Canada
 - i. Prepared a transmission-distribution interoperability framework to guide IESO/ compare alternative DSO models (functional capabilities, capabilities of different models, system actors, conceptual design for shared data platform)

**STATE OF MAINE
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DATE: 2/13/24

- CSIRO Australia
 - i. Develop (with Energy Catalyst) system architecture for Australia's national electricity market to guide transition
- Additional projects mentioned:
 - i. Energy System Integration Group – developed reports on how DERs could be integrated into wholesale markets/assessing DSO models in UK and Australia
 - ii. NARUC/NASEO Taskforce – designing integrated resource-distribution-transmission planning process

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER: Strategen

DATE: 2/13/24

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section III. Proposed Services	40	36

Evaluation Team Comments:

I. Proposed Services

- A. The Strategen approach “proposes that the credibility and defensibility of any assessment of DSO policy outcomes requires consideration of the structural or ‘architectural’ relationships between proposed DSO model(s) and the evolving power system and stakeholder ecosystem”
- B. DSO Study Part I Discovery
 - Maine/regional review, including current grid planning operational practices, DER market incentives
 - Other DSO models
- C. DSO Study Part I Stakeholder Engagement
 - Familiarity with Maine landscape
 - One on one interviews, stakeholder list initially identified
 - “Engage” U.S. based stakeholders (grid technology companies, Gridlab, Maryland PSC, CPUC staff, etc.)
 - “Engage” with international stakeholders in UK, Australia, Canada
 - Public webinars
- D. DSO Study Part I Assessment
 - Regulatory assessment
 - Review of different DSO models
 - Mostly qualitative/high-level, with comprehensive cost benefit analysis to be conducted in Part 2 of the study
 - Survey of qualitative/quantitative benefits available from previous DSOs
- E. DSO Study Part I Deliverables
 - Complete, per the RFP
- F. DSO Study Part II
 - Affirms capabilities
- G. Implementation – Work Plan

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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DATE: 2/13/24

- Provided, gaant chart
- Timeline may not be compatible with Resolve

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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BIDDER: Strategen

DATE: 2/13/24

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$214996	,	\$191800	x	25 points	=	22.3

Evaluation Team Comments:

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Agile Fractal Grid

DATE: 2/7/24

EVALUATOR NAME: Claire Swingle

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Deploys decentralized grid software and hardware with ability to participate in energy markets (microgrids), as well as telecommunications infrastructure (ISPs, utilities),
 - Energy as a Service for microgrids (modeling, managed service)
 - Doesn't identify specific familiarity within Maine
 2. Subcontractors
 - Lots of subcontractors listed:
 - TeMix – Ed Cazalet (board of directors at CAISO, DSO work in California, transactive energy)
 - Tenaska Power Services – energy management services for 7,580MW of generation, deep understanding of energy markets
 - Dragos – cybersecurity
 - CMG – planning and implementation
 - DRG Technical Solutions – system planning, T&D engineering, engineering and operations support for Duke Energy, AEG, etc.
 - Open Access Technology International, Inc- software to connect resources to wholesale energy markets, optimize power supply management efforts, services used by over 90% of utilities in the U.S.
 3. Organizational Chart
 - Provided
 - Specific staff and topic area identified for each subcontractor
 4. Litigation
 - None named
 5. Certificate of Insurance
 - Not included
 6. Past Projects
 - Overall, demonstrate familiarity with landscape of grid management, and grid-edge technologies, but potentially more on the ability to implement a DSO or provide technology than to conduct the evaluation
 - IBM

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Claire Swingle

EVALUATOR DEPARTMENT: Governor's Energy Office

1. Reference from IBM, 43 assessments/engineering designs for IBM for expanding broadband, limited detail on what the assessments entailed
- Southern California Edison
 1. TeMix/Ed Cazalet: developed market design and cloud platform used by SCE in CalFUSE Dynamic Pricing Project
- North Carolina Electric Membership Corporation
 1. OATI: NCEMC started with implementation of the OATI DSO solution platform (DERMS)

II. Proposed Services

1. DSO Study Part I Discovery
 - Identify DSO models from other jurisdictions and examine applicability to Maine
 - Findings will be maintained in a living Requirements Register for prioritization
 - Review Maine, ISO-NE and NMISA specific literature, including utility data, operations/planning handbooks and forecasts, etc.
 - Prioritization workshop
 - Work with engineers and service providers to plan set of capabilities needed by DSO to operationalize 3 objectives
2. DSO Study Part I Stakeholder Engagement
 - 4 Charettes with utilities, large companies and building facilities, government offices and transportation, consumer activist groups, educational institutions
 - individual interviews with key stakeholders
 - Public webinars
3. DSO Study Part I Assessment
 - Plan to ground analysis in regulatory and statutory context of Maine and existing electric grid operations
 1. Potentially will analyze legal regulations to determine compatibility with DSO model
 - Plan to ground analysis in clear assumptions related to design, structure, and responsibilities of DSO in Maine
 - Other proposed methods to conduct the analysis
 1. Stakeholder engagement

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 2/7/24

EVALUATOR NAME: Claire Swingle

EVALUATOR DEPARTMENT: Governor's Energy Office

2. Projection of costs, benefits, and risks over the intermediate term for preferred options
3. Review with stakeholders, GEO
4. Build off of assumptions and prioritization listed in discovery phase – continuous analysis, creation of the business processes, KPIs, Critical Success Factors, risk analysis, implementation strategies
5. Conceptual design options, preliminary programmatic plan creation, business analysis plan creation
 - Focus on the 4 main responsibilities of the DSO, as enumerated in the Act
4. DSO Study Part I Deliverables
 - Complete
 - Provides outline of report
5. DSO Study Part II
 - Bidder confirms ability and commitment to performing Part II requirements, if directed by the GEO
6. Implementation – Work Plan
 - Provides gaant chart

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: AGILE

DATE: 2/6/24

EVALUATOR NAME: Bob Snook

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization describing their qualifications and three project examples
 - Agile is a consulting firm which began as a defense contractor and expanded into energy.
 - Project 1. Agile worked with IBM on broadband programs.
 - Project 2. TeMix worked on a decentralized market design for DERMS and load management with CA PUC.
 - Project 3. OATI worked with the North Carolina Munis on a system to manage demand response and distributed energy resources.
 2. Subcontractors
 - TeMix which worked with CA to develop and implement CA's DSO system.
 - OATI which worked with North Carolina in DERMS integration.
 - Tanaka
 - Dragos
 - CMG
 - DRP
 3. Organizational Chart
 - Yes.
 4. Litigation
 - None.
 5. Certificate of Insurance
 - They say yes but I could not find it.
- II. Proposed Services
 1. DSO Study Part I Discovery
 - Literature review of Maine policies, NMISA, and ISO-NE data, and other relevant studies.
 - Agile will compile a list of relevant DSO models especially CA.
 - Presentation and discussion with GEO on various models.
 2. DSO Study Part I Stakeholder Engagement
 - Stakeholder engagement process based on interviews with stakeholders including utilities, government agencies, consumer groups, etc., and two webinars.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 2/6/24

EVALUATOR NAME: Bob Snook

EVALUATOR DEPARTMENT: Governor's Energy Office

3. DSO Study Part I Assessment
 - Agile will develop an integrated system plan for the state's utilities.
 - The system will operate the state's grids 24/7 and integrate DERS.
 - Will canvas world-wide for models how to operate a transparent DER market.
4. DSO Study Part I Deliverables
 - A report with executive summary on how the DSO will do system planning and operation and administer DER markets.
 - Presentation deck.
 - Excel datasets
 - Available to brief legislature.
5. DSO Study Part II
 - Note: Study Part II will be undertaken only if the GEO determines, based on Study Part I, that a DSO could achieve the objectives of the Act.
6. Implementation – Work Plan
 - Detailed chart with identified team members and time schedule.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Agile Fractal Grid

DATE: 2/7/2024

EVALUATOR NAME: Ethan Tremblay

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Agile Fractal Grid was originally formed during a sole sourced contract between Intel and The Department of Defense to tighten the security of the Defense Communications Network.
 - A large community of practice of sizable companies as well as small innovative companies to implement the concept of decentralization through mass customization employing reusable patterns at scale.
 2. Subcontractors
 - TeMIX – Ed Cazalet, transactive energy author, CAISO director, experience with DSO development and implementation in CA
 - Tenaska Power Services – energy management services, provide optimization, risk mgmt., and power trading and settlement services for more than 7,500 MW of generation and demand-side customers
 - Dragos – cybersecurity
 - CMG – strategic consulting firm, focus on smart cities/utilities/buildings/airports/transportation/interconnections
 - DRG Technical Solutions – electric infrastructure services – system planning, engineering for T/D/microgrids
 - Open Access Technology International, Inc – energy solutions provider, provides solutions including the industry-leading e-Tagging solution, industry registry tools, the OATI Hub, and integration capabilities
 3. Organizational Chart
 - Provided, naming one person from each subcontractor and AFG
 4. Litigation
 - Statement provided
 5. Certificate of Insurance
 - Proposal states “The certificate of insurance is concatenated below” but no certificate(s) appear.
 6. Past Projects
 - IBM – provides a reference for 43 broadband assessments and engineering designs from John Reynolds/Stratum Broadband
 - Southern California Edison – provides a reference for SCE CalFUSE Dynamic Pricing Project from TeMIX/Ed Cazalet. Pilot

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

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BIDDER NAME: Agile Fractal Grid

DATE: 2/7/2024

EVALUATOR NAME: Ethan Tremblay

EVALUATOR DEPARTMENT: Governor's Energy Office

project for market design and cloud platform to test California Flexible Unified Signal for Energy framework. Decentralized DSO concept.

- North Carolina Electric Membership Corporation provides a reference for OATI's webSmartEnergy DERMS platform.

II. Proposed Services

1. DSO Study Part I Discovery

- Affirm requirement to compile/review existing literature
- Propose creation of a Requirements Register for prioritization
- Propose refined vision for DSO operation based on stakeholder feedback and initial prioritization
- Propose to develop conceptual options to determine optimal path to achieve DSO goals, with associated KPIs
- Propose to develop a programmatic plan for selected conceptual option, including conceptual pro forma for costs/revenues and potential financing strategies

2. DSO Study Part I Stakeholder Engagement

- Propose key stakeholder interviews as directed by GEO – 1-on-1 interviews and small number of charettes, with proposed list of five stakeholder categories
- Affirms webinar requirement
- Propose prioritization workshop following preliminary gathering of findings
- In Assumptions section, provides a list of assumptions including that “arrangements for the facilities for the meetings and public webinars will be provided by the GEO” and “consultations with legal experts that are serving the GEO”

3. DSO Study Part I Assessment

- Generally discusses initial content that would be included in assessment
- Emphasis on utilization of digital twin methodology

4. DSO Study Part I Deliverables

- Affirms specifications contained in RFP
- Provides outline of proposed final report

5. DSO Study Part II

- Discussed

6. Implementation – Work Plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 2/7/2024

EVALUATOR NAME: Ethan Tremblay

EVALUATOR DEPARTMENT: Governor's Energy Office

- Emphasizes agile lean development process approach
- Provides gantt chart with task and subtask by month
 1. Most subcontractors all listed for each subtask
- Final report in October 2024
- Provides general cautions (risks) and mitigations approaches

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Agile Fractal Grid

DATE: 2/7/24

EVALUATOR NAME: Allie Rand

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Sole sourced contract between DoD and Intel to enhance security of Defense Communications Network
- Name originates from agreement w National Rural Electric Cooperatives Association
- CA, NY, TX team

2. Subcontractors

- TeMex, Ed Cazalet – CA DSO Approach
- Tenaska – energy mgmt. services
- Dragos – ICS/OT practitioners
- CMG – strategic consulting firm
- DRG – system planning and engineering
- Open Access Technology International – energy industry software solutions

3. Organizational Chart

- Provided, AFG, lead; equal level across subs

4. Litigation

- None

5. Certificate of Insurance

- Referenced, but not included

6. Past Projects

- Project One: IBM client, recommending applicant. Expanding of broadband services in the US
- Project Two: Southern California Edison, TeMix experience with similar deployment of DSO concept in CA
- Project Three: North Carolina Electric Membership Corporation (NC-EMC), DERMS platform

II. Proposed Services

1. DSO Study Part I Discovery

- Scope, Assumptions, Understanding the Requirements, Methods and resources reference Maine statute, did not reference other

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Agile Fractal Grid

DATE: 2/7/24

EVALUATOR NAME: Allie Rand

EVALUATOR DEPARTMENT: Governor's Energy Office

- resources noted in "Resources for Bidders". Describes team expertise.
 - Activities and subtasks aligned with RFP Discovery tasks; additionally notes to be used in prioritization process incorporating stakeholder input
 - Preliminary concept of financial aspects including illustrations of potential financing strategies
2. DSO Study Part I Stakeholder Engagement
 - Aligned with RFP Stakeholder engagement tasks
 - Proposed charrettes with example focused stakeholder areas
 - Two public webinars
 - Individual
 3. DSO Study Part I Assessment
 - AFG team will develop list of key assumptions, alternatives, and criteria to solicit feedback
 - Aligned with RFP Stakeholder engagement tasks
 - Expands on considerations related to four main responsibilities per legislation; notes New Brunswick Power connection and pathway from Nova Scotia to NYC of North America Super Grid
 - "In terms of debt taken on for the new renewables sources, the ability to overproduce potential power, and then deliver it to other parts of the country when needed, is a key element of the revenue plan needed by the members of the DSO to remain financially sustainable."
 - Notes need for 24x7 operation of system and reliance on IT systems
 - Notes utilizing national lab partners – "in addition to these direct subcontractors on the project itself, some 16 other specialty groups including NREL and Oak Ridge National Labs are part of the Digital Twin Consortium RB that have already reviewed the Resole and have already met to support the project as it unfolds through its various phases..."
 - Notes ISO NE public comment on carbon emission tax, the "need to evaluate the current technology infrastructure to support a DSO"; may include "technical audits, infrastructure evaluations, and technology capability assessments"
 4. DSO Study Part I Deliverables
 - Aligned with RFP

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Agile Fractal Grid

DATE: 2/7/24

EVALUATOR NAME: Allie Rand

EVALUATOR DEPARTMENT: Governor's Energy Office

- Provides detailed outline of anticipated structure of the report
5. DSO Study Part II
- Study Part II will be undertaken only if the GEO determines, based on Study Part I, that a DSO could achieve the objectives of the Act; however, bidders should indicate their understanding of the requirements enumerated in Sections 3 and 4 of the Resolve and confirm their ability and commitment to performing them if directed by the GEO.
6. Implementation – Work Plan
- Finalized by Nov 24
 - Stakeholder sessions in March – April (webinars as well as one on ones)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: DNV

DATE: 2/7/2024

EVALUATOR NAME: Allie Rand

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Experience developing DSO functions in the UK
- US & Canada, 4000+ employees
- Experience in ME and NE, supporting ME OPA and EMT as the Non Wires Alternative coordinator since 2020
- Work with National Grid and NYSERDA on investigating DER use to address grid constraints
- Contractor for GEO on energy markets

2. Subcontractors

- None

3. Organizational Chart

- Included
- Stakeholder engagement specialists, analysts, SMEs supporting

4. Litigation

- Included a statement regarding no litigation that would materially affect its ability to perform the services

5. Certificate of Insurance

- Included, \$6M general liability

6. Past Projects

- Project One: NWA Coordinator – conducts NWA assessments on T&D projects put forward by state's utilities
- Project Two: ENA DSO Implementation Plan and Roadmap – designed GB Distribution System Operation Implementation plan and roadmap Jan – June 2020
- Project Three: Distributed Energy Resource Integration Strategy – evaluation of best practices of DER interconnection to support NGrid

II. Proposed Services

1. DSO Study Part I Discovery

- Baseline: Demonstrates familiarity with key relevant reports (Maine Won't Wait, PUC Grid Planning)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: DNV

DATE: 2/7/2024

EVALUATOR NAME: Allie Rand

EVALUATOR DEPARTMENT: Governor's Energy Office

- Relevant DSO Model Compilation: includes specific examples ,and applicability to ME context highlighted as specific task
- Deliverable: baseline report of ME energy system, summary of DSO model review
- 2. DSO Study Part I Stakeholder Engagement
 - Development of stakeholder plan
 - Conduct 10 1-on-1 interviews
 - Deliverables: stakeholder lists, interview guide, transcripts and summaries, webinar materials, memo following each webinar
- 3. DSO Study Part I Assessment
 - Completion of three assessments based on evaluations criteria and assumptions and ME context
 - 1. Assessment 1: impact on electricity costs
 - 2. Assessment 2: impact on system reliability and performance
 - 3. Assessment 3: impact on state climate goals and DG growth ; notes utilization of approaches utilized in NYSERDA and DPS study
 - Valuation to get to one DSO model could provide additional detail
- 4. DSO Study Part I Deliverables
 - Aligns with RFP
- 5. DSO Study Part II
 - Notes understanding of requirements and qualifications
- 6. Implementation – Work Plan
 - Through Q1 2025, does not align with timeline in Resolve

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Agile

DATE: 2/6/24

EVALUATOR NAME: Bob Snook

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization describing their qualifications and three project examples

- Bidder has extensive, worldwide experience and over 4,000 energy employees. Bidder has experience in Maine with the Non-Wires Alternatives program. Each of the team members has an extensive resume. The three projects are:
- Project 1. DNV is the Maine NWA coordinator. DNV has developed relationships with the state's EDCs and knows the distribution system and has experience with both front of meter and BTM.
- Project 2. Bidder worked with the UK's transmission and distribution operators to build a Distribution System Operator. This is a much larger scale version of what Maine is attempting.
- Project 3. DNV worked with National Grid to develop best practices for DER integration.
- Project 2 is the most relevant to this RFP.

2. Subcontractors

- N/A

3. Organizational Chart

- Yes. List of task leads and staff for each step with CVs.

4. Litigation

- Details confidential but affirms no litigation material to this RFP.

5. Certificate of Insurance

- Yes

II. Proposed Services

1. DSO Study Part I Discovery

- DNV will have a kick-off meeting with GEO to set objections and then establish a Maine energy baseline based on its NWA work and a detailed examination of DER operations in the state.
- Literature review of Maine policies, ISO-NE data, relevant studies.

2. DSO Study Part I Stakeholder Engagement

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Agile

DATE: 2/6/24

EVALUATOR NAME: Bob Snook

EVALUATOR DEPARTMENT: Governor's Energy Office

- Stakeholder engagement process based on DNV's work in ME, CA, and UK, etc. including developing a stakeholder list, an interview guide for GEO, interviews, webinars.
- 3. DSO Study Part I Assessment
 - DNV will compile a list of relevant DSO models based on its world-wide work.
 - Presentation and discussion with GEO on various models.
- 4. DSO Study Part I Deliverables
 - DNV will assess impacts of proposed DSO model on consumer costs, reliability and Maine's climate goals.
 - DNV will prepare a draft and final report.
- 5. DSO Study Part II
 - Note: Study Part II will be undertaken only if the GEO determines, based on Study Part I, that a DSO could achieve the objectives of the Act.
 - DNV will develop a design for the DSO model to be implemented in ME and an implementation plan for the DSO, utilities and stage agencies.
- 6. Implementation – Work Plan
 - The implementation plan will consider DSO function, roles and responsibilities, policy and regulatory modifications if needed.
 - Some potential DSO services include acting as the primary interface between ISO-NE and ME state EDCs, operating an open market for DERs, state integrated distribution system planning, optimizing distribution operations, infrastructure growth, demand management and energy efficiency programs.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: DNV

DATE: 2/6/24

EVALUATOR NAME: Claire Swingle

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Many years of consulting experience around the world
- Experience developing DSO functions and DER flexibility markets in U.K. (functional specifications and an implementation roadmap)
- Knowledge of Maine's distribution system and its stakeholders
- Expertise with stakeholder engagement
- Identifies specific staff with the required experience identified in the Act

2. Subcontractors

- None

3. Organizational Chart

- Project team includes primary staff working as the Maine NWA coordinator, very familiar with utilities' distribution system planning processes and regulatory landscape in Maine
- Provided, with names identified

4. Litigation

- Indicates litigation is confidential but confirms that there is none that would materially affect its ability to perform the services under this contract

5. Certificate of Insurance

- Included, \$6M in general liability per incident

6. Past Projects

- Overall, highly relevant and demonstrate bidder's technical capabilities
- OPA's Non-Wires Alternative Coordinator
 1. Assessing capital project plans, developing potential NWA options and analyzes technical and economic feasibility of each option. Demonstrates understanding and relationships with existing regulatory and operational concerns and stakeholders
- Great Britain's Energy Networks Association (ENA) DSO Implementation Plan and Roadmap
 1. Work with distribution network operators, transmission owners, electricity system operators to deliver Distribution

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

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BIDDER NAME: DNV

DATE: 2/6/24

EVALUATOR NAME: Claire Swingle

EVALUATOR DEPARTMENT: Governor's Energy Office

System Operation implementation plan and roadmap.
Demonstrates similar DSO assessment and planning and stakeholder communication

- National Grid – DER Integration Strategy
 1. Evaluated DER integration efforts throughout U.S, Australia, and UK to identify best practices in DER interconnection, valuation, and aggregation; conducted detailed market research and jurisdictional scans related to regulatory approval processes, wholesale market participation, and key program design elements
- Additional Projects Mentioned, including:
 1. USEF design team for roles and responsibilities, market coordination, measurement and settlement
 2. Assessing implementation of DSO model in Ontario, including developing generalized DSO models with associated activities, roles, and functions. Future phases will include evaluating and comparing the viability, economic benefits, risks and opportunities, and implementation requirements for generalized DSO models in Ontario; assessing the needs, value, costs, and benefits of DSO based on system conditions, DER growth and deployment, and the cost of developing DSO functionality; and synthesize all phases to determine the least-cost, least-regret model and implementation considerations for DSO and local energy markets (LEMs) in the Ontarian energy system.

II. Proposed Services

1. Project Initiation
 - Project plan with defined deliverables, stakeholder engagement plan, kick-off meeting with GEO
2. DSO Study Part I Discovery
 - Assess other jurisdictions, including UK, Netherlands, Germany and relevant DSO models and assess how elements might apply to the Maine context regarding respective responsibilities, flexibility of price signals, existence of neutral market facilitator, etc.
 - Establish baseline of Maine context from ongoing NWA work
 - Maine broader context: wholesale markets, federal policies, etc.
 - ISO-CELT, EIA, Maine Won't Wait

**STATE OF MAINE
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EVALUATOR NAME: Claire Swingle

EVALUATOR DEPARTMENT: Governor's Energy Office

- Identify gaps in current constraint management practice, policy and markets arrangements and establish needs case for implementing new DSO functions subject to different levels of DER penetration and other system conditions
- 3. DSO Study Part I Stakeholder Engagement
 - Identify staff lead for stakeholder engagement
 - Interviews (up to 10), interview guide
 - Webinars
 - Stakeholder engagement list
- 4. DSO Study Part I Assessment
 - Electricity cost
 - 1. Investment to establish vs. cost savings at T&D levels (based on knowledge of NWA BCA)
 - 2. AESC, EIA Annual Energy Outlook projected energy prices
 - 3. Provides qualitative/conceptual table of potential impacts
 - System Reliability
 - 1. Establish baseline of performance including CAID/SAIF, SAIDI, local system plan/local area studies, etc. to identify gaps and where a DSO model might deliver critical system benefits (mostly qualitative)
 - State climate goals
 - 1. BAU to compare against DSO
 - Will take one DSO model that is most applicable to the Maine context based on discovery and stakeholder engagement and perform further assessment
- 5. DSO Study Part I Deliverables
 - Complete
 - Assistance to GEO preparing EUT presentation is not included in budget
- 6. DSO Study Part II
 - Bidder indicates their understanding of the requirements enumerated in Sections 3 and 4 of the Resolve and confirm their ability and commitment to performing them if directed by the GEO.
- 7. Implementation – Work Plan
 - Gaant chart + staff leads
 - March 15- March 31 2025

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: DNV Energy Insights USA Inc.

DATE: 2/7/2024

EVALUATOR NAME: Ethan Tremblay

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Energy Systems business area includes more than 4,000 energy experts and technical advisors who include internationally recognized thought leaders and experts in the fields of engineering, market research, economic analysis, and EM&V
 - First-of-a-kind experience in developing DSO functions and DER Flexibility Markets in leading energy systems including developing DSO functional specifications and an implementation roadmap in the U.K
 - Primary staff working as the Maine NWA coordinator and have intimate familiarity with the utilities' distribution system planning processes and the regulatory landscape surrounding grid planning in Maine
 - Specialized team can anticipate and plan for potential challenges on how DERs can participate in the distribution and wholesale markets
 - Known prior experience in Maine – current contractor to OPA as NWA coordinator; previous contractor for GEO on OSW markets and strategies; EMT implementation
 2. Subcontractors
 - No subcontractors
 3. Organizational Chart
 - Provided, with project role and team structure.
 4. Litigation
 - “Information regarding litigation is confidential and not subject to disclosure. However, we confirm that DNV Energy Insights USA Inc. has had no litigation that would materially affect its ability to perform the services under this contract.”
 5. Certificate of Insurance
 - Provided
 6. Past Projects
 - Maine Office of the Public Advocate – Non-Wires Alternative Coordinator. Assesses capital project plans, screens based on established exclusion criteria and a high-level assessment of potential NWAs, develops potential NWA options, analyzes the

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: DNV Energy Insights USA Inc.

DATE: 2/7/2024

EVALUATOR NAME: Ethan Tremblay

EVALUATOR DEPARTMENT: Governor's Energy Office

technical and economic feasibility of each option, and makes recommendations on if and how a capital project can be deferred or avoided, cost effectively, by an NWA

- Great Britain Energy Networks Association DSO Implementation Plan and Roadmap. Worked with all GB distribution network operators (DNOs), Transmission Owners (TOs) and the Electricity System Operator (ESO) to deliver the GB Distribution System Operation (DSO) Implementation Plan and accompanying online roadmap.
- National Grid – Distributed Energy Resource Integration Strategy. Evaluated DER integration efforts from utilities and regions throughout the U.S., Australia, and the U.K. to identify best practices in DER interconnection, valuation, and aggregation to support National Grid in improving their program efforts to increase customer DER installations.
- Seven additional examples provided.

II. Proposed Services

1. DSO Study Part I Discovery

- Initial project initiation phase to define vision and goals, expectations, schedule, roles, etc. and develop stakeholder engagement plan
- Establish baseline of Maine energy system, inventory and review of wide range of policy and technical literature, standards, forecasts, supplement with stakeholder interviews
- Compile review of DSO models in North America and across the world. Notes requirements from Resolve likely differ from other models
- Establish principles to prioritize elements of other models for Maine application
- Deliverable:
 1. A presentation and discussion on key findings following the baseline assessment of Maine's energy landscape, including relevant inputs from stakeholder interviews and the desktop review of DSO models world.
 2. A presentation and discussion on DSO models assessment and DNV's recommendation for the DSO model which will be used in the assessment Task of this study.

2. DSO Study Part I Stakeholder Engagement

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 2/7/2024

EVALUATOR NAME: Ethan Tremblay

EVALUATOR DEPARTMENT: Governor's Energy Office

- Discussion of principles and approach for effective stakeholder engagement
 - Up to 10 1-on-1 in-depth interviews; DNV will develop stakeholder list with GEO input/approval
 - Draft and final interview guide reviewed with GEO, record/transcribe interviews where permitted
 - Two public webinars – first on vision, approach, and objectives; second summarizing assessment and obtaining feedback. Detailed approach for webinars. Provide memo to GEO summarizing afterward.
3. DSO Study Part I Assessment
- Propose three assessments of one DSO model.
 - Cost/benefit, implementation cost and T&D benefits. Benchmark cost to other jurisdictions. Table of potential categories of costs/benefits provided.
 - Reliability/performance – high level due diligence review, baseline construction, gap analysis, assess DSO impact on gaps
 - Statutory goals – will evaluate extent to which DSO model could enable incremental renewable deployment and renewable generation
4. DSO Study Part I Deliverables
- Affirms provision of all deliverables required by RFP except presentation to legislature
5. DSO Study Part II
- Affirms understanding and capabilities
6. Implementation – Work Plan
- Gantt provided with task by date
 - Final report Q1 2025
 - Table with staff assigned by task

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: E3

DATE: 2/8/2024

EVALUATOR NAME: Allie Rand

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Markets, planning, strategy, policy, regulation – engagement led from New England office in Cambridge
- 2 ME specific studies over past 3 years: 2021 2030 RPS study, and 2022 Energy Storage Market Assessment
- Support of NGrid FERC 2222 implementation including in ISONE

2. Subcontractors

- None
- Possibly involving subcontractors for part 2

3. Organizational Chart

- Lead partner, Project lead and project manager supported by subject matter experts (4) and analysts (2)

4. Litigation

5. Certificate of Insurance

- Yes - \$1M general liability

6. Past Projects

- National Grid – Implementation of FERC 2222
- Fortis Alberta – Expert testimony in Alberta Utility Commission's Distribution Inquiry
- Joint Utilities of New York – writing vision chapter for DSIP filings

II. Proposed Services

1. DSO Study Part I Discovery

- Includes preliminary list of resources, including Climate Plan, IGP, CMP and Versant rate cases, NMISA and ISONE resources
- Includes preliminary list of DSO studies for review
- Proposed deliverable: summary deck that can serve as an appendix to the DSO Feasibility Study

2. DSO Study Part I Stakeholder Engagement

- 5 part stakeholder engagement strategy, at least three public webinars

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

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BIDDER NAME: E3

DATE: 2/8/2024

EVALUATOR NAME: Allie Rand

EVALUATOR DEPARTMENT: Governor's Energy Office

- Proposed deliverable: summary of engagement process including consolidated notes from interviews
- 3. DSO Study Part I Assessment
 - Assessment Framework, including high level overview of common criteria to evaluate DSOs; stakeholder working sessions noted as part of framework development process
 - Use of BAU counterfactual to the DSO to define current and future issues for Maine's grid; also proposes an "enhanced BAU case" to compare DSO to an improvement on current model
 - Cost and benefit analysis based on framework and structures
- 4. DSO Study Part I Deliverables
 - Complete
- 5. DSO Study Part II
 - Bidder indicates their understanding of the requirements enumerated in Sections 3 and 4 of the Resolve and confirm their ability and commitment to performing them if directed by the GEO.
- 6. Implementation – Work Plan
 - Start: March 15, 2024 – Final study date proposed in September
 - End: March 31, 2025

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: E3

DATE: 2/6/24

EVALUATOR NAME: Bob Snook

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization describing their qualifications and three project examples
 - E3 is an energy consulting firm focused on North America. E3 has done two studies in Maine.
 - Project 1. E3 worked with National Grid in implementing FERC Order 2222 in integrating DERs in NY.
 - Project 2. E3 provided testimony before the Alberta PUC on integrating DERs in that Province.
 - Project 3. E3 worked with NY utilities to develop their Distribution Implementation Plan filings.
2. Subcontractors
 - None unless DOE approves implementation and E3 may work with a subcontractor.
3. Organizational Chart
 - Yes. Detailed CVs of team as well.
4. Litigation
 - None in last five years.
5. Certificate of Insurance
 - Yes.

II. Proposed Services

1. DSO Study Part I Discovery
 - Literature review of Maine policies, NIMSA, and ISO-NE data, and other relevant studies. Research ME PUC dockets.
 - E3 will compile a list of relevant DSO models especially including NY and Alberta but also including the UK, Ca and Australia.
 - E3 will prepare a summary and discuss with GEO on models.
2. DSO Study Part I Stakeholder Engagement
 - E3 will develop a stakeholder engagement process with public meetings and prepared questions and at least three webinars.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Bob Snook

EVALUATOR DEPARTMENT: Governor's Energy Office

3. DSO Study Part I Assessment
 - E3 will use the materials gathered above to develop a DSO assessment framework to meet the goals of reducing costs, improving reliability and meeting ME climate goals.
 - Working with GEO to develop a DSO plan that integrates system planning, operates the state's electric system and administers a market for DERs.
 - E3 will also produce a business-as-usual counterfactual model for comparison.
 - Will develop a feasibility study to estimate costs to develop a DSO.
4. DSO Study Part I Deliverables
 - A final report.
 - Presentation deck.
 - Excel datasets
 - Available to brief legislature.
5. DSO Study Part II
 - Note: Study Part II will be undertaken only if the GEO determines, based on Study Part I, that a DSO could achieve the objectives of the Act.
 - Based on final feasibility report, develop a DSO plan including any needed legislative or regulatory changes to implement.
 - Identify a potential state agency to house the DSO.
 - Identify any regulatory authority the DSO may need.
6. Implementation – Work Plan
 - Three steps, discovery, stakeholder engagement and assessment leading to a final DSO plan.
 - Detailed chart with identified tasks and time schedule.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: E3

DATE: 2/7/24

EVALUATOR NAME: Claire Swingle

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Long-standing consultancy
 - Familiarity with Maine (2030 RPS target, Maine Energy Storage Market Assessment)
 - Policy – DER integration
 2. Subcontractors
 - No subcontractors for Part I
 - Potentially subcontractors for Part II
 3. Organizational Chart
 - Provided, specific staff identified
 - Strong experience, but light in DSO field
 4. Litigation
 - None
 5. Certificate of Insurance
 - Provided, \$1M general liability for each occurrence
 6. Past Projects
 - Overall projects demonstrate understanding of grid operations, developing roadmaps, and DERs, and familiarity with Maine, there could have been more information on experience with evaluating or establishing DSOs
 - National Grid implementing FERC 2222
 1. In NYISO, ISONE markets, detailed input on ISO tariff language, processes, procedures,
 - FortisAlberta
 1. Provided DER integration roadmap considering consumer choice, market design, and technology adoption
 - Joint Utilities of New York
 1. Wrote chapter of Distributed System Implementation Plan for integrating DERs
 - Participating in EPRI TSO & DSO Coordination for DER working groups
 - E3 was a primary author in the cost effectiveness framework incorporated in the yet unpublished Distribution System Platform

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: E3

DATE: 2/7/24

EVALUATOR NAME: Claire Swingle

EVALUATOR DEPARTMENT: Governor's Energy Office

(DSPx) Report being sponsored by the Electricity Office of the US
DOE

- Maine Renewable Energy Goals Assessment

II. Proposed Services

1. DSO Study Part I Discovery

- Maine context, grounded in deep experience in New England
- Identify DSO models from other jurisdictions (California, New York, Australia, UK)
- Deliverables: summary of discovery process

2. DSO Study Part I Stakeholder Engagement

- Develop stakeholder engagement plan
- Key questions
- Stakeholder meetings
- Webinars (3)
- Summary of key takeaways

3. DSO Study Part I Assessment

- Will develop qualitative/quantitative assessment, provides a few indicative criteria, including DER interconnections enabled, electric system costs/savings, cost to establish/implement DSO
- Develop BAU, enhanced BAU (more progressive utilities) and DSO
- Helpful conceptual utility function taxonomy
- Consider phased-in DSO

4. DSO Study Part I Deliverables

- Complete

5. DSO Study Part II

- Bidder indicated their understanding of the requirements enumerated in Sections 3 and 4 of the Resolve and confirm their ability and commitment to performing them if directed by the GEO.

6. Implementation – Work Plan

- Complete March 15-March 31 2025
- Gaant chart that seems reasonable

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Energy and Environmental Economics, Inc. (E3)

DATE: 2/8/2024

EVALUATOR NAME: Ethan Tremblay

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Founded in 1989, E3 helps utilities, system operators, regulators, policy makers, developers, and investors make the best strategic decisions possible in an industry that is rapidly transitioning its electric and gas sectors.
- E3 specializes in supporting complex analytical processes that are informed by stakeholders and tailored to our clients' needs and concerns. Our approach draws on our extensive experience assisting governments, regulators, service providers, and utilities in developing plans and programs for decarbonization, grid technology investments, business model evolution, energy efficiency, integrated resource planning, and rate designs.
- Offices in CA, NY, MA, and Alberta. This engagement led from Cambridge, MA.
- Previous work in Maine – GEO Renewable Energy Goals Market Assessment; GEO Energy Storage Market Assessment

2. Subcontractors

- None

3. Organizational Chart

- Provided as specified, including matrix with qualifications and team member biographies, and resumes

4. Litigation

- Statement provided

5. Certificate of Insurance

- Provided

6. Past Projects

- National Grid - supporting National Grid with implementation of FERC Order 2222 in the NYISO and ISONE markets.
- FortisAlberta - provide expert testimony in the Alberta Utilities Commission's (AUC) Distribution Inquiry. E3's testimony provided a specific and actionable roadmap for the integration of DERs of all technologies and outlined that the challenges of DER integration will be unique to each jurisdiction based on consumer choice, market design, and technological advancement.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Energy and Environmental Economics, Inc. (E3)

DATE: 2/8/2024

EVALUATOR NAME: Ethan Tremblay

EVALUATOR DEPARTMENT: Governor's Energy Office

- Joint Utilities of New York - assist in writing the vision chapter for their Distributed System Implementation Plan (DSIP) filings. The DSIPs are biennial plans that describe how each of the six Joint Utilities will develop distributed system platforms (DSPs). A core element in the Reforming the Energy Vision (REV) proceeding, DSPs are a platform for information sharing, DER integration services, and DER market services.
- Three additional examples provided.

II. Proposed Services

1. DSO Study Part I Discovery

- Develop an in-depth understanding of the current and future state of Maine's electric grid
 - 1. Provides preliminary list of resources
- Identify DSO models from other jurisdictions their applicability to the Maine DSO Study
 - 1. Provides preliminary list of jurisdictions/model resources
 - 2. Will supplement with GEO and stakeholder input
- Deliverable: a summary of the discovery process.

2. DSO Study Part I Stakeholder Engagement

- Proposes a five-part stakeholder engagement strategy
 - 1. Stakeholder engagement plan development, stakeholders identified by GEO
 - 2. Establish key stakeholder questions for Part 1 Assessment
 - 3. Conduct stakeholder meetings, including agenda development and summaries
 - 4. At least three public webinars, one at start; one presenting proposed DSO framework; one following initial findings of the study. Collect comments and incorporate feedback.
 - 5. Summarize engagement and feedback in powerpoint to become appendix in final report.
- Deliverable: summary of the stakeholder engagement process, including consolidated notes from interviews.

3. DSO Study Part I Assessment

- Develop DSO Assessment Framework based on prior tasks and internal experience
 - 1. Qualitative and quantitative criteria to be used for feasibility assessment, incorporating legislative requirements and stakeholder feedback

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 2/8/2024

EVALUATOR NAME: Ethan Tremblay

EVALUATOR DEPARTMENT: Governor's Energy Office

2. Provides example/common criteria to assess DSO against business-as-usual
 - Work with GEO to establish DSO model(s) – minimum one, maximum unspecified
 - Develop BAU as counter-factual
 - Cost assessment based on implementation, rely on utility cost information where available and applicable
 - Qualitative assessment outlining opportunities and challenges, qualitative rankings with justification
 - Consider phased-in approach
4. DSO Study Part I Deliverables
 - Affirms all deliverables as required
5. DSO Study Part II
 - Affirms qualifications and capability for Part II if directed.
6. Implementation – Work Plan
 - Gantt with task and subtask by week
 - Final Part 1 proposed in September

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: EPE

DATE: 2/8/2024

EVALUATOR NAME: Allie Rand

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Consulting firm est. in 1968, electricity network planning
 - 250+ team members
 - Experience in distribution system planning
 - Experience with Maine PUC
 2. Subcontractors
 - None
 3. Organizational Chart
 - Included, project lead supported by subject matter experts and project engineer
 4. Litigation
 - No ongoing litigation, mediation, arbitration regarding performance of services within the past five years
 5. Certificate of Insurance
 - Provided
 6. Past Projects
 - Maine PUC
 1. Investigating the design and operation of distribution system by PUC, filed under docket 2023-00039.
 - Deloitte Consulting
 1. Engineering support for Energy Sector Support Activity to assist Jordan's Energy and Minerals Regulatory Commission ; determination of the Jordan National Electric Power Co and key distribution KPIs
 - Maine PUC – Grid Planning
 1. Facilitation of stakeholder engagement process
 - Additional projects listed include budget comparison of IOUs in ME, ISO NE impact studies
- II. Proposed Services
 1. DSO Study Part I Discovery
 - Notes existing knowledge of Maines T&D systems resulting from transmission studies and grid modernization road map process, IOU T&D budget comparison and IGP engagement efforts

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

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BIDDER NAME: EPE

DATE: 2/8/2024

EVALUATOR NAME: Allie Rand

EVALUATOR DEPARTMENT: Governor's Energy Office

- Literature review to include: DSO model comparative analysis; grid infrastructure and utility data analysis; technology advancement review; ISO NE and NMISA document review; Decarbonization goals and Climate Plan analysis
- 2. DSO Study Part I Stakeholder Engagement
 - EPE to work with GEO to identify relevant stakeholders
 - EPE to develop comprehensive engagement plan including info sessions and workshops
 - Focused group discussions and 1:1 interviews
 - Two webinars, one following study kick off and one following initial draft findings
- 3. DSO Study Part I Assessment
 - Consolidates discovery and stakeholder information phases
 - “The core value proposition of a DSO is to enable new capabilities and services for new and existing DER. Consequently, the cost-effectiveness of DSO implementation will be evaluated based on the ability of alternative solutions to address the goals identified in the Resolve”
 - Identifies specific elements – costs, benefits -- to be assessed within each key goal as identified by the legislature
- 4. DSO Study Part I Deliverables
 - Final report summarizing findings from the discovery and stakeholder engagement phase
 - An initial draft report will be provided to GEO for review
 - Once review of initial draft report completed, a pre final report to be provided
 - Presentation developed for public engagement; final report provided after webinar is complete capturing feedback from webinar
- 5. DSO Study Part II
 - Did not see note of acknowledgement for Part II
- 6. Implementation – Work Plan
 - Begins 3/15, final report delivered by end of 2024, support to GEO for presentation to EUT through 2/8

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: EPE

DATE: 2/6/24

EVALUATOR NAME: Bob Snook

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization describing their qualifications and three project examples
 - EPE is an energy consulting firm with experience in distribution system planning, DER integration, power studies, etc., and has worked in ISO, NYISO, PJM, ERCOT, CAISO, etc. Has Maine experience.
 - Project 1. EPA worked with the ME PUC investigation the operations of CMP and Versant on utility practices including DER integration.
 - Project 2. EPE worked with the government of Jordan ME with respect to the administration of the national power company.
 - Project 3. EPE worked with the ME PUC in implementing the Act Regarding Utility Accountability and Grid Planning by facilitating the stakeholder engagement process.
2. Subcontractors
 - Could not find any information in the bid.
3. Organizational Chart
 - Yes. Detailed CVs of team as well.
4. Litigation
 - None in last five years.
5. Certificate of Insurance
 - Yes.

II. Proposed Services

1. DSO Study Part I Discovery
 - EPE will prepare an in-depth analysis of the Maine grid with EPE's extensive prior knowledge gained through projects with the ME PUC and worked done with ISO-NE
 - Literature review of Maine policy document and NMISA systems
 - EPE will compile a list of relevant DSO models.
2. DSO Study Part I Stakeholder Engagement
 - EPE will work with GEO to identify stakeholders and hold two webinars.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: EPE

DATE: 2/6/24

EVALUATOR NAME: Bob Snook

EVALUATOR DEPARTMENT: Governor's Energy Office

3. DSO Study Part I Assessment

- EPE will use the materials gathered above to evaluate the feasibility and costs of a DSO structure in Maine, focusing on such matters as: technical feasibility, relevant business models, cost effectiveness and alternatives and implementation barriers.
- develop a DSO assessment framework to meet the goals of reducing costs, improving reliability and meeting ME climate goals.
- With the assessment complete, will work with GEO to design DSO(s) and a counterfactual and then evaluate the cost/benefits of multiple DSO models.
- Based on final feasibility report, develop a DSO plan including any needed legislative or regulatory changes to implement.
- Identify a potential state agency to house the DSO.
- Identify any regulatory authority the DSO may need.

4. DSO Study Part I Deliverables

- A final report.
- Presentation deck.
- Excel datasets
- Available to brief legislature.

5. DSO Study Part II

- Not mentioned

6. Implementation – Work Plan

- Three steps, discovery, stakeholder engagement and assessment leading to a final DSO plan.
- Detailed chart with identified tasks and time schedule.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Electric Power Engineers (EPE)

DATE: 2/7/24

EVALUATOR NAME: Claire Swingle

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Respected consultancy firm
 - Expertise in distribution system planning, DER integration, power system modeling, etc.
 - Has worked with the Maine PUC
 - Engineering expertise – modeling proposed site viability (production, curtailment, etc)
 2. Subcontractors
 - None specified
 3. Organizational Chart
 - Provided with staff identified
 - Engineering heavy expertise, distribution planning and interconnection, understanding related to equipment, control capabilities, data analysis, process modifications, and regulatory requirements; DER integration, capacity and voltage planning,
 - Non-wire alternative analysis, time-series analysis
 - DSO experience not specified
 4. Litigation
 - None
 5. Certificate of Insurance
 - Provided, up to \$2m per occurrence
 6. Past Projects
 - Overall, projects demonstrate understanding of existing Maine utility operations and landscape. Second project does not seem relevant.
 - Maine PUC
 1. Docket 2021-00039, assessed market/operations/technology upgrades needed in Versant and CMP, which included much stakeholder engagement
 - Deloitte
 1. Engineering support to determine key performance indicators for Jordan National Electric Power Company
 - Maine PUC

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EVALUATOR DEPARTMENT: Governor's Energy Office

1. Support integrated grid planning stakeholder process, during which EPE familiarized itself with Maine state policy, T&D planning processes, etc.
- Other projects mentioned
 1. Engineering analysis for ISO-NE
 2. CMP & Versant budget analysis for Maine PUC

II. Proposed Services

1. DSO Study Part I Discovery

- Maine electric grid and relevant regulatory frameworks – potential to support a DSO model (grid's capacity to integrate DERs, forecasts for growth of load/DER, progress in implementing technologies critical to DSO functionality – ADMS, DERMS, AMI. – essentially use 00039 roadmap)
- Rules, tariffs, protocols, agreements and procedures from NMISA, ISO-NE, FERC
- DSO model comparative analysis – identify assets, tech requirements, different functional roles/responsibilities required in different conceptual DSOs
- Market structures, energy pricing mechanisms, and regulations that govern electricity distribution and transmission in the state of Maine
- Decarbonization and climate goals analysis (ev integration, demand response management implications)

2. DSO Study Part I Stakeholder Engagement

- Educating stakeholders about DSO concepts (information sessions, workshops) - # not specified
- One on one interviews - # not specified
- 2 webinars

3. DSO Study Part I Assessment

- Each DSO model will be evaluated separately for its ability to achieve stated goals: technical feasibility, regulatory and business model feasibility, cost-effectiveness and relevant alternatives, implementation barriers
- Centered around value proposition of DSO enabling new capabilities and services for new and existing DER
- Reduction of electricity costs – savings: improving operational/planning process efficiencies, facilitating participation of

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EVALUATOR DEPARTMENT: Governor's Energy Office

additional resources in market constructs, improving utilization of DER for ancillary or other services, improved utilization of distribution capacity, deferring/preventing new construction, reduction of technical energy losses, improved reliability; cost: staff, technology, integration/coordination with existing utility staff

- Improved system reliability – DSO impact on system planning (forecasting, integration of new technology, infrastructure/capital planning), real time grid management (managing day to day grid dynamics, responding to unplanned disruptions) and coordination with ISO-NE (how collaboration can optimize research dispatch, manage inter-regional power flows, ensure integration of distribution and transmission systems)
- State goals – how DSO facilitate integration of DG resources (role in interconnection, developing policies), economic incentives and market mechanisms (tariff structures, financial incentives, market-based mechanisms)

4. DSO Study Part I Deliverables

- Complete, though did not mention providing unlocked excel/models

5. DSO Study Part II

- Not referenced

6. Implementation – Work Plan

- Complete
- Gaant chart (March 15- December 2024)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Electric Power Engineers, LLC (EPE)

DATE: 2/8/2024

EVALUATOR NAME: Ethan Tremblay

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Prominent consulting firm established in 1968 and a pioneer in electricity network planning. EPE places particular emphasis on being an industry leader in providing a holistic approach to enable a clean energy transition and build the grid of the future.
 - More than 250 staff, national footprint and experience in all major markets
 - Known prior experience in Maine – Maine PUC grid planning investigation and subsequent integrated distribution planning support
 2. Subcontractors
 - None
 3. Organizational Chart
 - Provided
 - CVs also provided
 4. Litigation
 - Statement provided
 5. Certificate of Insurance
 - Provided
 6. Past Projects
 - Maine Public Utilities Commission - investigate the design and operation of the distribution system by the two investor-owned T&D utilities operating within the state. This investigation resulted in a series of reports about current utility practices, public stakeholder input and perspective on distribution system needs, a gap analysis comparing current tools and practices to those likely to be necessary to meet future needs, and a roadmap detailing key changes and investments to address the identified gaps.
 - Deloitte Consulting - EPE provided engineering support for Energy Sector Support Activity (ESSA) to assist Jordan's Energy and Minerals Regulatory Commission (EMRC) with the administration, calculation, and determination of the Jordan National Electric Power Company (NEPCO) and distribution key performance indicators (KPIs).

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DATE: 2/8/2024

EVALUATOR NAME: Ethan Tremblay

EVALUATOR DEPARTMENT: Governor's Energy Office

- Maine PUC - support the MPUC in implementing the Act Regarding Utility Accountability and Grid Planning for Maine's Clean Energy Future by facilitating the stakeholder engagement process, which sought to identify stakeholder priorities, processes and requirements for the forthcoming Integrated Grid Plan Order.
- Two additional project examples provided.

II. Proposed Services

1. DSO Study Part I Discovery

- Proposes comparative analysis with list of potential goals/criteria including those required
- Proposes detailed assessment of existing grid infrastructure and capabilities with a focus on DER integration
- Proposes assessment of existing progress in enabling technology deployment
- Review of ISO-NE and NMISA documentation and policy objectives

2. DSO Study Part I Stakeholder Engagement

- Work with GEO to identify stakeholders
- Propose development of comprehensive stakeholder engagement plan
- Unspecified number of one-on-one interviews and focused group discussions
- Two webinars – one at kickoff, including feedback form afterward, and one with initial draft findings. Feedback from both incorporated subsequently.

3. DSO Study Part I Assessment

- Proposes additional related criteria to refine those required
- Cost analysis focused on potential cost reductions and implementation cost
- Reliability/performance focused on system planning and forecasting, real-time grid management, ISO coordination, and demand side programs.
- Policy focused on enhancing DG integration and economic incentives/market mechanisms

4. DSO Study Part I Deliverables

- Proposes final report with one draft iteration with GEO. Presentation proposed for webinars only.

5. DSO Study Part II

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DATE: 2/8/2024

EVALUATOR NAME: Ethan Tremblay

EVALUATOR DEPARTMENT: Governor's Energy Office

- Not mentioned
- 6. Implementation – Work Plan
 - Table provided. Final report proposed by November 1.

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INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Guidehouse

DATE: 2/8/2024

EVALUATOR NAME: Allie Rand

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Consulting service provider with experience in management, energy, technology, and other areas
- Experience with DSO related projects
- 17,000+ employees in over 55 locations globally
- Acquired by Bain Capital on December 14 2023, notes that "All of the resources required to successfully execute performance of this proposal remain with Guidehouse."

2. Subcontractors

- None

3. Organizational Chart

- Included; engagement oversight with project team consisting of subject matter specialists, support analysts, one technical lead and a project manager

4. Litigation

- None included, notes that Guidehouse has acquired several companies in past five years and this only includes claims against GH Inc and does not include claims against acquired entities
- "Outside of employment claims that arise in the normal course of business for a professional services firm of our size and scope, Guidehouse is not currently and has not within the past five years been involved in litigation where we have paid a claimant either as part of a settlement or by decree"

5. Certificate of Insurance

- Included

6. Past Projects

- National Grid/Eversource – Guidehouse is completing the evaluation of EDC performance under MA DPU grid modernization plans. GH has completed evaluations for the first four years of the program (2018 – 2021) and evaluation period was extended for an additional four years (through 2025)

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BIDDER NAME: Guidehouse

DATE: 2/8/2024

EVALUATOR NAME: Allie Rand

EVALUATOR DEPARTMENT: Governor's Energy Office

- Tennessee Valley Authority – partnered with TVA in 2019 to complete stakeholder engagement process to assess need for a DER enablement model in TVA.
- Duke Energy – Guidehouse performed current state assessment of Duke Energy Midwest Operations with respect to requirements in FERC 2222 and PJM and MISO compliance filings; defined requirement gaps. Project is ending May 2024
- Additional projects listed, noted that GH is working on an ongoing project with ME DAFS for verification and validation of Workday implementation

II. Proposed Services

1. DSO Study Part I Discovery

- Proposes Phase 0: Project launch to confirm scope, formalize governance structure and meeting cadence
- In Phase 0, GH to submit a data request in the form of a prioritized list and explanations of why data is needed
- 1a: Conduct contextual analysis to understand current ecosystem for DSO, the data request formulated in Phase 0 will be the basis for review. GH to solicit support from GEO to request utility specific data
- 1b: Desk review will leverage existing DSO models and determine applicability to Maine, includes analysis of impacts of FERC 2222
- Discovery deliverables: Rapid contextual analysis, stakeholder interviews, desk review report

2. DSO Study Part I Stakeholder Engagement

- Collaborate with GEO to identify stakeholders; lists examples to include
- High level stakeholder engagement plan; references recurring meetings such as weekly status updates and monthly Steering Committee meetings
- Stakeholder engagement to inform Assessment phase
- Two public webinars at the start of the assessment phase, and following the development of study draft findings

3. DSO Study Part I Assessment

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EVALUATOR DEPARTMENT: Governor's Energy Office

- Analysis determining DSO feasibility in ME will include high level cost savings, reliability, and timeline to climate goal achievement relative to BAU
 - High level characterization of energy market structure and rate impacts of DSO in Maine
 - Operational impacts, and technical, economic and policy impacts
4. DSO Study Part I Deliverables
- Public Webinars
 - Final Report – DSO Feasibility Study
 - Final Deck
 - Supporting Data
 - Additional capabilities separately scoped note expert witness testimony and federal funding and grants
 - Note: Appendix of pertinent Guidehouse research is included
5. DSO Study Part II
- Note: Study Part II will be undertaken only if the GEO determines, based on Study Part I, that a DSO could achieve the objectives of the Act; however, bidders should indicate their understanding of the requirements enumerated in Sections 3 and 4 of the Resolve and confirm their ability and commitment to performing them if directed by the GEO.
6. Implementation – Work Plan
- Project start March 15
 - Project end final report 7/15

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RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Guidehouse

DATE: 2/6/24

EVALUATOR NAME: Bob Snook

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization describing their qualifications and three project examples

- Guidehouse is a large, world-wide energy consulting firm. Guidehouse has a specialized group that provides consulting services to government agencies in the Northeast.
- Guidehouse has experience with "DSO-related" subjects.
- Project 1. Guidehouse is evaluating the Grid Modernization Plans of the three Massachusetts utilities for the MA DPU.
- Project 2. Guidehouse is working for the TVA to develop a stakeholder engagement process in the context of a plan involving integrating DERs.
- Project 3. Guidehouse is working with Duke Energy in meeting its compliance obligations under FERC Order 2222 involving DERs.

2. Subcontractors

- None.

3. Organizational Chart

- Yes. Description of team as well.

4. Litigation

- None included. Guidehouse has purchased several companies and makes no representation about litigation before mergers. Guidehouse excludes "employment claims that arise in the normal course of business."

5. Certificate of Insurance

- Yes.

II. Proposed Services

1. DSO Study Part I Discovery

Pre-Discovery

- Kick-off meeting with GEO to align on objectives and approaches.
- Guidehouse will issue a Data Request to obtain relevant Maine policies, NMISA, and ISO-NE data, and other relevant studies.
- Guidehouse will prepare a project plan.

Discovery

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EVALUATOR NAME: Bob Snook

EVALUATOR DEPARTMENT: Governor's Energy Office

- From the above materials, a Current State Contextual Analysis will be prepared.
- Guidehouse will review the DSO models being considered by GEO and evaluate which functions will be performed by the ISO, DSO, and EDCs.
- 2. DSO Study Part I Stakeholder Engagement
 - Guidehouse will engage stakeholders early on and will include webinars.
- 3. DSO Study Phase I Assessment
 - Guidehouse will use the materials gathered above and is in-house Guidehouse Insights team to build a baseline of current utility situation in Maine and produce a Desk Review.
- 4. DSO Study Part I Deliverables
 - Rapid Contextual Analysis
 - Stakeholder Interviews.
 - Desk Review Report
- 5. DSO Study Phase II
 - Guidehouse then analyze and compare to the various DSO models to identify the benefits and drawbacks relative to Maine's three goals and develop an analysis of DSO models with webinars and internal meetings with GEO.
 - There will be a Draft Report and webinar.
 - Final Report on the feasibility of a DSO for Maine assessing the objectives of lower costs, improved reliability and climate goals.
- 6. Implementation – Work Plan
 - Guidehouse provides a schedule for each phase.

RFP Part II not referenced

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BIDDER NAME: Guidehouse

DATE: 2/8/24

EVALUATOR NAME: Claire Swingle

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Indicates experience with DSO adoption for public and private sector entities – FERC 2222 and DERMS capacity assessments, utility DER forecasting and strategy development
 - Experience with California Energy Commission, California PUC, NJ BPU
 - Established consultancy group
 2. Subcontractors
 - None
 3. Organizational Chart
 - Included with staff identified
 - Technical lead has expertise in DER integration into utility control systems, ADMS, interoperability, IOU systems
 - No staff with DSO experience listed
 4. Litigation
 - None included
 5. Certificate of Insurance
 - Included, up to \$1m per occurrence
 6. Past Projects
 - Overall, projects demonstrate some familiarity with ISO-NE though not in Maine specifically, and DER integration, evaluations and roadmap creation
 - National Grid/Eversource
 1. Evaluation of grid modernization investments for MA DPU prudency review, conducted over 8 year period with annual evaluation studies for each – monitoring and control, volt-var optimization, telecommunications, distribution automation, ADMS/advanced load flow, first four years have been filed with DPU
 - Tennessee Valley Authority
 1. Stakeholder engagement to assess DER enablement, explored changes that would be required to transition, Guidehouse facilitated series of workshops around common vision, future resource planning practices, assessed current

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EVALUATOR DEPARTMENT: Governor's Energy Office

state planning capabilities, identified gaps, with 10 year roadmap (DER/Load forecasting, DER integration, DER framework/governance)

- Duke Energy
 1. Supporting FERC 222 compliance plans – performed current state assessment, gaps, future state mapping (process maps/tools, internal/external coordination and communication process flows, data needs and timelines), assessed market participation model across T&D system interconnection, operations, metering, settlements, tariffs, demand response, cybersecurity (will be completed may 2024)
- Additional projects mentioned:
 1. National Grid Future Distribution System Orchestrator (DSO) vision – identify strategic options for Western Power Distribution as it adapts to becoming a DSO (workshops, series of strawmen, final strategy paper)
 2. NGED DSO to design and trial commercial arrangements to be deployed by the DSO following successful project completion in 2025
 3. EirGrid – understand role of TSO managing DER, international benchmark of TSO DSO operating models and recommended one for EirGrid

II. Proposed Services

1. DSO Study Part I Discovery
 - Review Maine context
 - Interviews with key stakeholders
 - Review other DSO models
 - Describe characteristics of each DSO model (functions, roles, regulatory considerations, implementation considerations) within Maine context
2. DSO Study Part I Stakeholder Engagement
 - Webinars
 - Interviews
3. DSO Study Part I Assessment

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EVALUATOR DEPARTMENT: Governor's Energy Office

- Overall, outcomes described seem sufficient/comprehensive/appropriate but methodology for analysis is not provided with enough detail
 - Benefits, costs, and risks of various DSO models in Maine
 - Will develop evaluation criteria to assess DSO models from other jurisdictions
 - Analysis will include: high-level estimates of cost savings, improved reliability, etc. relative to BAU baseline
 - High-level characterization of energy market structure and rate impacts of a DSO
 - Operations, efficiency, equity, affordability characterization
 - Operational and business process recommendations
4. DSO Study Part I Deliverables
 - Complete
 - EUT presentation not mentioned (expert witness testimony would be additional)
 5. DSO Study Part II
 - Not mentioned
 6. Implementation – Work Plan
 - Discovery and Assessment expected to be complete in 4 months
 - Gaant chart included

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BIDDER NAME: Guidehouse

DATE: 2/8/2024

EVALUATOR NAME: Ethan Tremblay

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Leading global provider of consulting services to public and commercial clients with extensive experience in management, energy, technology, environmental sustainability, and risk consulting.
 - More than 17,000 staff in more than 55 locations globally
 - Manages large-scale transformations for state governments across New England, including the State of Maine, the Commonwealth of Massachusetts, the State of Vermont, and the State of New Hampshire.
 2. Subcontractors
 - None
 3. Organizational Chart
 - Yes, with team members by role. Most team members focused on organizational design/design, some energy/utility expertise in SME/technical roles
 4. Litigation
 - None listed.
 5. Certificate of Insurance
 - Provided.
 6. Past Projects
 - National Grid and Eversource – The Massachusetts Department of Public Utilities (DPU) pre-authorized elements of Grid Modernization Plans (GMPs) made by the three state electric distribution companies (EDCs) –National Grid, Eversource, and Unitil. However, cost recovery for these investments is contingent on a prudency review that includes a formal grid modernization evaluation. The evaluation objective is to measure the progress made toward the achievement of DPU's grid modernization. Guidehouse is completing the evaluation (including an evaluation plan and evaluation studies) over an 8-year period to ensure a uniform statewide approach and to facilitate coordination and comparability.
 - Tennessee Valley Authority - Guidehouse partnered with Tennessee Valley Authority (TVA) to complete a multistakeholder engagement process with both TVA and representatives from

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EVALUATOR NAME: Ethan Tremblay

EVALUATOR DEPARTMENT: Governor's Energy Office

TVA's local power companies (LPCs) to assess the need for a Distributed Energy Resources (DER) enablement model in the Tennessee Valley. To evaluate emerging integrated planning approaches, TVA formed a Distributed Resource Plan (DRP) Study Group to explore the changes that will be required to transition toward a distributed and diverse energy portfolio and engaged Guidehouse to serve as strategic advisor and facilitator.

- Duke Energy - the team performed a current state assessment of Duke Energy Midwest Operations with respect to the requirements in FERC Order 2222 and PJM and MISO Compliance Filings and defined requirement gaps based on the current state and future state mapping. In addition, Guidehouse defined process maps/tools, internal & external coordination & communication process flows, identify criteria/data needs and associated timelines to ensure successful facilitation and operational reliability. Lastly, Guidehouse assessed the selected market participation model option and developed future state recommendations and implementation roadmap on how to implement the recommendations across the seven functional areas.
- Six additional examples in table

II. Proposed Services

1. Phase 0

- Project launch, kick-off to formalize scope and approach. Stakeholder identification in collaboration with GEO. Develop high-level stakeholder engagement plan. Consideration of a project steering committee.
- Development of a data request, followed by interviews/discovery meetings.
 - 1. Q – for distribution utilities, RTOs, unclear if other entities.
- Development of Project Management Plan.

2. DSO Study Part I Discovery

- Propose Current State Contextual Analysis and Desk Review
- Current State Contextual Analysis. Includes list of data types to request primarily from electric utilities, and categories of analysis components.

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EVALUATOR NAME: Ethan Tremblay

EVALUATOR DEPARTMENT: Governor's Energy Office

- “Guidehouse expects to investigate a set of DSO models currently being considered by Maine” – unclear if expecting a list to be provided; assume utilizing list compiled in Desk Review
 - Desk Review - leverage existing DSO models being planned or already successfully implemented in other jurisdictions and consider their design, structure, and DSO responsibilities relative to applicability to Maine.
 - Consider models from US and Europe
 - Propose utilizing proprietary Guidehouse Insights research related to DSO models and FERC 2222
3. DSO Study Part I Stakeholder Engagement
 - Propose an iterative stakeholder visioning process
 - Two public webinars – at the start of Assessment and presenting draft Part I Report
 - Targeted interviews as needed during Discovery
 4. DSO Study Part I Assessment
 - Propose evaluation criteria based on requirements in Resolve
 - High-level cost and savings estimates, reliability impact, and timeline for statutory goals relative to a BAU scenario
 5. DSO Study Part I Deliverables
 - Affirms all required deliverables, proposes legislative support as separate scope
 6. DSO Study Part II
 - Not addressed
 7. Implementation – Work Plan
 - Provides high level timeline by phase with deliverable dates
 - Proposes final report delivered by July 15, 2024

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: London Economics International, LLC

DATE: 2/12/2024

EVALUATOR NAME: Allie Rand

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Global economic, financial and strategic advisory firm specializing in energy and infrastructure
 - Experience with DSO model in engagement with Ontario Energy Board
 - 25+ years experience in ISO NE and active in discussion of DERS in ME and NE
 2. Subcontractors
 - Frontier Economics – experience with DSO implementation in Europe; relevant experience
 3. Organizational Chart
 - Included
 - Includes Stakeholder Engagement/North America Team (including New England Lead and Specialist, and NWA expert) and International Specialists
 4. Litigation
 - “LEI is not currently named in any litigation and has not been a party in any case that has closed within the past five years”
 5. Certificate of Insurance
 - Included
 6. Past Projects (overall, ME and NE specific experience, and DSO relevant experience in other jurisdictions)
 - Ontario Energy Board to assist in developing regulatory reforms with respect to utility remuneration, preparation of concept paper on different approaches explored DSO model as an option
 - Maine PUC, analysis of short and long term costs and benefits to establish Maine Power Delivery Authority (LD 1646)
 - Maine OPA, examination of costs and benefits of Maine’s NEB program
 - Additional projects also listed, included ME PUC’s investigation of CMP mgmt. issues and related ratemaking and performance incentive mechanisms; and East Cambridge substation assessment

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BIDDER NAME: London Economics International, LLC

DATE: 2/12/2024

EVALUATOR NAME: Allie Rand

EVALUATOR DEPARTMENT: Governor's Energy Office

II. Proposed Services

1. DSO Study Part I Discovery

- Compile and review relevant literature
 1. Provides illustrative list of sources
 2. LEI to “distill inventory of possibilities into two or three composite models for assessment in Maine” based on matching of theoretical permutations based on range of DSO functionalities with existing models in US, Europe and UK
 3. Sub FEL to lead international case study analysis work ; FEL experience supporting England’s Northern Powergrid transition to DSO
- Include info from stakeholder engagement
- Identify DSO models form other jurisdictions
 1. Begin with series of problem statements
 2. Benefit cost analysis utilizing high level assumptions
 3. “While the SOW refers to “least cost,” LEI’s preference
 4. would be to identify best value, taking into account the balance of costs and benefits that a particular model may bring”

2. DSO Study Part I Stakeholder Engagement

- Concurrent with the above, conduct stakeholder engagement with one on one interviews with key stakeholders and at least two public webinars
- At least two public webinars
- Includes illustrative list; notes experience with Iowa Utilities Board
- Following development of the draft of the report, proposes “developing a short slide pack to present to stakeholders that provides an overview of results and a list of potential FAQs”

3. DSO Study Part I Assessment

- Analysis and narrative
- Defining status quo against DSO models under consideration -> creation of scenarios of ME electricity sector evolution for benchmarking -> develop evaluation criteria (includes proposed example criteria) -> ID recommended model

4. DSO Study Part I Deliverables

- Aligned with RFP

5. DSO Study Part II

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INDIVIDUAL EVALUATION NOTES**

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DATE: 2/12/2024

EVALUATOR NAME: Allie Rand

EVALUATOR DEPARTMENT: Governor's Energy Office

- No reference
- 6. Implementation – Work Plan
 - Assumes Feb 15 start date
 - Gantt chart indicates 4 one on one interviews with key stakeholders
 - Draft report by Feb 2025, Final Report by March 2025

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: LEI

DATE: 2/7/24

EVALUATOR NAME: Bob Snook

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization describing their qualifications and three project examples

- London Economics International (LEI) is an international energy consulting firm with 25 years' experience in New England and that has done many projects with Maine PUC. DSO experience in Canada, NY, Middle East and FEL in EU.
- Project 1. LEI prepared a DSO concept paper for the Ontario Energy Board.
- Project 2. LEI worked with the ME PUC on the costs/benefits of the proposed Maine Power Delivery Authority.
- Project 3. LEI worked with the Maine Office of the Public Advocate to evaluate the costs/benefits of the proposed Maine Net Energy Billing Program.

2. Subcontractors

- Frontier Economics Ltd.

3. Organizational Chart

- Yes.

4. Litigation

- None in last five years.

5. Certificate of Insurance

- Yes.

II. Proposed Services

1. DSO Study Part I Discovery

- Literature review of Maine policies, NIMSA, and ISO-NE data, and other relevant studies. Research ME PUC dockets.
- LEI will compile a list of relevant DSO models from the US, EU and the UK.
- LEI will distill a summary down to two or three DSO models most useful to Maine and discuss with GEO on models.
- LEI will list the powers relevant to DSOs that can be deployed by MPUC.

2. DSO Study Part I Stakeholder Engagement

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: LEI

DATE: 2/7/24

EVALUATOR NAME: Bob Snook

EVALUATOR DEPARTMENT: Governor's Energy Office

- LEI will develop a stakeholder engagement process with public meetings and prepared questions and webinars.
3. DSO Study Part I Assessment
 - LEI will use the DSO models and costs as a starting point.
 - Define the status quo to compare against the DSO.
 - Create scenarios for the Maine grid for evaluation against status quo and identify the recommended model.
 4. DSO Study Part I Deliverables
 - A final report.
 - Presentation deck.
 - Excel datasets
 - Available to brief legislature.
 5. DSO Study Part II
 - Not mentioned
 6. Implementation – Work Plan
 - Detailed chart with identified tasks and time schedule.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: LEI

DATE: 2/12/24

EVALUATOR NAME: Claire Swingle

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Strategic advisory firm
- Experience in New England and Maine (Maine PUC, Maine OPA, ISO-NE)
- DER integration experience

2. Subcontractors

- Frontier Economics Ltd (FEL) with DSO conceptualization and implementation experience, including assessing relationship between transmission system operators and distribution owners, practicality of separating asset ownership from system operation for DSOs
- In Proposed Services section, details FEL's support of Northern Powergrid in relation to transition to DSO – supporting business plan and DSO strategy development; cost benefit analysis of DSO governance options (qualitative and quantitative); assessment of implications of DSO transition for cost benchmarking; involved in transition to DSO over FIIO-ED2 (ratemaking period) and map these to baseline expectations set out in Ofgem (UK regulator) guidance including network monitoring and operations, customer and network flexibility requirements and procurement, data sharing – experience developing counterfactual base case and comparing to DSO, roll-out costs
- "FEL resources will serve as a panel to provide input as needed to deliverables for the project and to participate as needed in presentations with GEO" suggests that the involvement of the subcontractor will not be extensive

3. Organizational Chart

- Provided, with staff identified
- Includes NWA expert, stakeholder engagement expert, New England leads, international specialists
- Not clear from org chart who will be doing what part of the services required under the RFP
- Resumes not provided, but information on personnel experience is in Proposed Services section

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: LEI

DATE: 2/12/24

EVALUATOR NAME: Claire Swingle

EVALUATOR DEPARTMENT: Governor's Energy Office

1. Project Manager has mostly natural gas experience
2. Managing director has a lot of transmission, power markets experience (not a lot of direct involvement)
3. FEL – development of DSO capabilities (pricing structures, strategy, trading and settlement platforms), TSO-DSO operating models and tariff design, regulatory; modeling
4. Litigation
 - Attests no ongoing litigation
5. Certificate of Insurance
 - Provided, \$1M of coverage
6. Past Projects
 - Ontario Energy Board
 1. Developing regulatory reforms; prepared concept paper on approaches to utility remuneration and incentives, including DSO model
 - Maine Public Utilities Commission
 1. analyzed short and long term costs and benefits of LD1646 to establish the Maine Power Delivery Authority – legal, regulatory, technical, financial, and operational issues, anticipated impacts of electricity rates, and developed alternatives
 - Maine OPA
 1. examined costs and benefits of Maine's Net Energy Billing program
 - Could've included a past project example/more specifics on involvement with DSOs (subcontractor experience described in Proposed Services section)

II. Proposed Services

1. Provides overview of DSOs with some key considerations and New York case study, which showed familiarity with the relevant questions
2. DSO Study Part I Discovery
 - Review relevant literature – does not identify anything in addition to the sources listed in the RFP
 - Include relevant information from stakeholder engagement
 - Identify DSO models from other jurisdictions – create inventory of possibilities then select two or three composite models for assessment in Maine

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 2/12/24

EVALUATOR NAME: Claire Swingle

EVALUATOR DEPARTMENT: Governor's Energy Office

- Considers equity implications
 - FEL would take the lead on analyzing and summarizing international case studies of DSOs
 - Identifies some data challenges, potential costs and benefits
 - “Deployed by Maine PUC”
3. DSO Study Part I Stakeholder Engagement
 - One on one interviews
 - At least two public webinars
 - Identifies illustrative group of stakeholders at organization level
 - Notes experience hosting policy charettes, workshops, town halls
 4. DSO Study Part I Assessment
 - Define baseline status quo conditions
 - Create scenarios of Maine electricity sector evolution to benchmark DSO models
 - Develop evaluative criteria (identifies potential candidates)
 - Identify recommended model – assess multiple with CBA high-level assumptions; best value
 5. DSO Study Part I Deliverables
 - Complete
 6. DSO Study Part II
 - No reference
 7. Implementation – Work Plan
 - Provides gaant chart with March 2025 final report deliverable

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: London Economics International, LLC (LEI)

DATE: 2/9/2024

EVALUATOR NAME: Ethan Tremblay

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Global economic, financial, and strategic advisory firm specializing in the energy and infrastructure sector.
 - Track record in designing market policies, strategic plans and regulatory frameworks to facilitate energy sector expansion, market reforms and deployment of renewable technologies around the globe.
 - Prior and current experience in Maine including for PUC and OPA.
 2. Subcontractors
 - Frontier Economics Ltd. (FEL)
 - All required information provided
 3. Organizational Chart
 - Provided
 4. Litigation
 - Provided statement
 5. Certificate of Insurance
 - Provided
 6. Past Projects
 - Ontario Energy Board - assist in developing regulatory reforms with respect to utility remuneration to support the evolution of the sector. As part of this engagement, the LEI team prepared a concept paper on approaches to utility remuneration and incentives (which included exploring DSO model as an option)
 - Maine PUC - analyze the short- and long-term costs and benefits of the Maine legislature's proposal (as presented in L.D. 1646) to establish the Maine Power Delivery Authority ("MPDA"). LEI examined the legal, regulatory, technical, financial and operational issues related to the L.D. 1646 proposal and its implementation
 - Maine OPA - assist in examining the costs and benefits of Maine's Net Energy Billing program. This involved examining the true cost of solar (including profile costs, network costs, balance costs, locational costs, and the potential indirect impact on the cost of Standard Offer service). It also involved estimation of potential benefits such as price suppression and impact on load at peak times.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: London Economics International, LLC (LEI)

DATE: 2/9/2024

EVALUATOR NAME: Ethan Tremblay

EVALUATOR DEPARTMENT: Governor's Energy Office

II. Proposed Services

1. Provides initial overview and literature review related to DSO design and function
2. DSO Study Part I Discovery
 - Conduct literature review, distill 2-3 composite models to assess based on objectives
 - FEL lead analysis and summary of international case studies
3. DSO Study Part I Stakeholder Engagement
 - Emphasizes importance of stakeholder engagement
 - One-on-one interviews to determine and test assumptions
 - Two webinars to provide results and obtain public feedback and comments
 - Webinar content developed in tandem with GEO
4. DSO Study Part I Assessment
 - Propose developing detailed list of potential benefits and methods for estimating associated value
 - Prefer best value objective
 - Propose detailed cost benefit framework and evaluation
5. DSO Study Part I Deliverables
 - Provided as specified
6. DSO Study Part II
 - Not discussed
7. Implementation – Work Plan
 - Provided
 - Project completion (Part I report) in February 2025

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Power Advisory

DATE: 2/7/24

EVALUATOR NAME: Bob Snook

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization describing their qualifications and three project examples

- Power Advisory (PA) is an energy consulting firm. PA has experience with DSOs in Calgary and DERs and has worked in Maine on floating OSW tech.
- Project 1. PA worked with Toronto Hydro on a benefits layering plan that appears to include T-D coordination as a DSO.
- Project 2. PA working with ENMAX on a Future Grid project that includes "DSO functionality."
- Project 3. PA working with MPUC on negotiations on the OSW Research Array.

2. Subcontractors

- Ignite

3. Organizational Chart

- Yes.

4. Litigation

- None in last five years.

5. Certificate of Insurance

- Yes.

II. Proposed Services

1. DSO Study Part I Discovery

- PA will use its experience with ME and ISO-NE and will review of plans and documents from utilities, NESCOE, New England state policies.
- PA will use the above to build a business-as-usual model and then compare this to a set of four main DSO models.

2. DSO Study Part I Stakeholder Engagement

- PA will rely on Ignite Energy Service to work with GEO to develop a list of stakeholders and then it will develop a stakeholder engagement process with public meetings and prepared questions and at least two webinars.
- Ignite will prepare a summary report for GEO.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 2/7/24

EVALUATOR NAME: Bob Snook

EVALUATOR DEPARTMENT: Governor's Energy Office

3. DSO Study Part I Assessment

- PA will use the materials gathered above to develop a DSO assessment framework to meet the goals of reducing costs, improving reliability and meeting ME climate goals.
- PA will compare the four DSO models to business-as-usual counterfactual.
- Will take the results and develop a Final Maine DSO Feasibility study.

4. DSO Study Part I Deliverables

- A final report.
- Presentation deck.
- Excel datasets
- Available to brief legislature.

5. DSO Study Part II

- Note: Study Part II will be undertaken only if the GEO determines, based on Study Part I, that a DSO could achieve the objectives of the Act.
- Based on final feasibility report, PA will evaluate costs and benefits from a DSO.
- Identify a potential state agency to house the DSO.
- Identify any regulatory authority the DSO may need.

6. Implementation – Work Plan

- Three steps, discovery, stakeholder engagement and assessment leading to a final DSO plan.
- Detailed chart with identified tasks and time schedule.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Power Advisory

DATE: 2/12/24

EVALUATOR NAME: Claire Swingle

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Energy sector management consulting firm since 2007
- Wholesale market design, rate design, social equity
- New England familiarity – working with Maine PUC in contract negotiations with New England Aqua Ventus; Northern Maine Transmission RFP; though most work is in Canada

2. Subcontractors

- Ignite Energy Solutions (only Terri-Lynn Duque) – stakeholder engagement and oversight; mostly– electric utility experience (Director of Strategic Innovation at ENMAX Power)

3. Organizational Chart

- Included with staff identified
- Ami Khalsa and Roy Hran subject matter leads but neither have worked on DSOs specifically

4. Litigation

- Attestation to no litigation

5. Certificate of Insurance

- \$2M professional liability certificate of insurance
- Says general liability certificate will be provided if awarded

6. Past Projects

- Some but limited DSO experience, limited international experience where most DSO happening
- Strongest expertise in project development, deep understanding of wholesale market
- Toronto Hydro – development of demand response program rules and T-D coordination protocols
- Enmax Future Utility Plan – establishment of framework linking activities of future utility to benefits realized by customers , evaluating multiple investments (NWA, grid modernization), prepare roadmap for investment over 8 years
- Maine PUC contract negotiations with New England Aqua Ventus
- Additional projects include
 1. Power to Connect (Ontario) analysis of LDCs becoming Fully Integrated Network Orchestrators (FINOs) seems relevant

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Power Advisory

DATE: 2/12/24

EVALUATOR NAME: Claire Swingle

EVALUATOR DEPARTMENT: Governor's Energy Office

II. Proposed Services

1. DSO Study Part I Discovery

- Review market structures and policy environments for local, state, and regional distribution systems
- Review existing DSO structures
- Describes four main DSO models to consider
- Deliverable is summary report in powerpoint format outlining findings

2. DSO Study Part I Stakeholder Engagement

- Establish stakeholder engagement plan, interview questions, pre-interview briefing packages to ensure stakeholders are informed
- One on one interviews with stakeholders
- Identified preliminary list of stakeholder organizations
- 2 public webinars
- Deliverable is summary report in powerpoint format outlining findings

3. DSO Study Part I Assessment

- Develop assumptions and scenarios for DSO implementation structures
- Evaluation criteria, with list of proposed criteria
- Establish BAU case
- Multiple models analyzed, with list of metrics

4. DSO Study Part I Deliverables

- Complete, with all deliverables listed in the RFP

5. DSO Study Part II

- Confirms ability

6. Implementation – Work Plan

- Gaant chart
- February 2025 final deliverable

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Power Advisory LLC

DATE: 2/12/2024

EVALUATOR NAME: Ethan Tremblay

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Energy sector management consulting firm focused on the North American electricity markets with expertise in wholesale market design and market products.
 - Founded in 2007
 2. Subcontractors
 - Ignite Energy Solutions
 - Ignite Energy Solutions (Terri-Lynn Duque) will be a member of the Power Advisory project leadership team. In addition to supporting strategic oversight of the project direction and delivery, she will support stakeholder engagement planning and delivery to ensure a thoughtful, efficient, and effective stakeholder management process. She will also be integral in assessing feasibility of the solutions, given her broad and extensive utility experience.
 - All required information provided
 3. Organizational Chart
 - Provided as specified
 4. Litigation
 - Statement provided
 5. Certificate of Insurance
 - Provided
 6. Past Projects
 - Toronto Hydro - Power Advisory is a partner and strategic advisor associated with Toronto Hydro's pilot project. Leveraging their local demand response program, Power Advisory has supported Toronto Hydro in the development of the program rules and T-D coordination protocols.
 - ENMAX Power - lead the development of ENMAX's Future Utility Plan which includes a detailed plan of initiatives related to electrification, and non-wires solutions deployment, grid modernization, and customer services.
 - Maine PUC - assist in contract negotiations with New England Aqua Ventus (NEAV), which is developing a floating OSW project in the Gulf of Maine
 - Eleven additional project examples provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Power Advisory LLC

DATE: 2/12/2024

EVALUATOR NAME: Ethan Tremblay

EVALUATOR DEPARTMENT: Governor's Energy Office

II. Proposed Services

1. Detailed project plan prepared and approved at outset
2. DSO Study Part I Discovery
 - Propose comprehensive literature review of existing resources, planning manuals, etc.
 - Examination of existing DSO structures across various jurisdictions, beginning with list of capabilities and functions (examples provided)
3. DSO Study Part I Stakeholder Engagement
 - Primary focus of subcontractor is stakeholder engagement
 - One on one interviews as directed by GEO, assume approximately 10
 - Two public webinars as specified
 - Will work with GEO to develop list of stakeholders
4. DSO Study Part I Assessment
 - Propose to first develop assumptions and alternatives, focus on governance, ownership, and DER adoption
 - Working meeting with stakeholders to establish
 - Assessment of benefits using baseline and DSO structure scenarios
 - Examples of assessment considerations provided
 - Powerpoint deck deliverable
5. DSO Study Part I Deliverables
 - All required deliverables provided as specified
6. DSO Study Part II
 - Requirements and capabilities confirmed
7. Implementation – Work Plan
 - Provided as specified
 - Final report proposed Feb 2025

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Power Advisory

DATE: 2/12/2024

EVALUATOR NAME: Allie Rand

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Energy sector mgmt. consulting firm founded 2007
- Team members with experience with “alternative regulatory frameworks”

2. Subcontractors

- Ignite Energy Solutions

3. Organizational Chart

- Included, Project manager with stakeholder and policy/regulatory affairs support; ISO NE and Maine Electricity Market review

4. Litigation

- There are no current or closed cases within the past five (5) years in which Power Advisory paid the claimant either as part of a settlement or by decree.

5. Certificate of Insurance

- Included

6. Past Projects

- Toronto Hyrdo – Grid Innovation Fund Benefits Stacking Pilot (ongoing); development of program rules and T&D protocols for DR program
- ENMAX Power – Future Utility Plan (2021); development of detailed plan of “initiatives related to electrification, non wires solutions deployments, grid modernization and customer services”
- Maine PUC – Aqua Ventus
 - 1. Assisted in contract negotiations with New England Aqua Ventus, which is developing floating OSW project in Gulf of Maine
- Additional projects listed, multiple projects in Canada

II. Proposed Services

1. DSO Study Part I Discovery

- Kick off meeting and scoping ; proposes monthly 2hr long checkins throughout the project btw GEO and PA; notes PA will provide document management services

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Power Advisory

DATE: 2/12/2024

EVALUATOR NAME: Allie Rand

EVALUATOR DEPARTMENT: Governor's Energy Office

- Review of market structures and policy for local, state, regional distribution systems
 - Includes overview and figures for four high level models to consider: No DSO, Hybrid DSO, Total DSO, Independent DSO
 - Provides illustrative list of resources to be used
2. DSO Study Part I Stakeholder Engagement
- “Power Advisory will conduct one-on-one interviews with key stakeholders as directed by GEO.”
 - At least two public webinars
 1. First focused on disseminating information and seeking comments/feedback
 2. Second following the initial draft findings to gather input for final deliverable
 - Includes proposed list of potential partners
 - PA will establish a stakeholder engagement plan; prep interview guide; conduct interviews and summarize findings; conduct webinars and summarize findings
3. DSO Study Part I Assessment
- Development of Assumptions and Alternatives identified as its own task
 - PA proposes conducting a working meeting with GEO and its selected partners in establishing key assumptions and alternatives; proposes to prep for and facilitate this meeting
 - Establish a BAU case based on present forecasts for DER adoption, renewable energy capacity, costs, and reliability.
 - Provides example assessment metrics
4. DSO Study Part I Deliverables
- Aligned with RFP
5. DSO Study Part II
- Bidder indicates their understanding of the requirements enumerated in Sections 3 and 4 of the Resolve and confirm their ability and commitment to performing them if directed by the GEO.
6. Implementation – Work Plan
- Kick off March 2024
 - Final study complete by March 2025

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Strategen Consulting

DATE: 2/12/2024

EVALUATOR NAME: Allie Rand

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Global, impact driven consulting firm, est. 2005
- Minority and woman owned business
- DSO experience, recent regulatory proceedings

2. Subcontractors

- Energy Catalyst (Australia) – specialist consulting practice advising on pathways for accelerating ‘whole system’ energy transformation.
- Lorenzo Kristov – independent consultant previously at CAISO, CEC

3. Organizational Chart

- Included, though specific roles not specified beyond “SME;” bios provided

4. Litigation

- None

5. Certificate of Insurance

- Included

6. Past Projects

- NRDC – Illinois Multi Year Integrated Grid Plan: Strategen was retained by NRDC to represent coalition of NGOs to provide expert testimony in review of Ameren and Commonwealth Edison grid plans
- Independent Electricity System Operator – Development of a Transmission-Distribution Interoperability Framework – Strategen supported IESO efforts to “specify and compare alternative DSO models...” (includes link to report)
- CSIRO (Australia’s national science agency) – Strategen and Energy Catalyst developed “Systems Architecture for Australia’s National Electricity Market (NEM)” to guide transition. Considered DSO models.

II. Proposed Services

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 2/12/2024

EVALUATOR NAME: Allie Rand

EVALUATOR DEPARTMENT: Governor's Energy Office

1. DSO Study Part I Discovery
 - Consistent with RFP/resolve
 - Review cost, reliability, and progress towards climate -> review current grid planning operational practices including reference to 2021-00039, 2022-0322, CMP and Versant rate cases → review current and proposed DER market incentives
 - “Review and compile all information on DSOs from other jurisdictions that the Strategen Team has directly worked in..”, includes US, Australia, Canada specific examples
2. DSO Study Part I Stakeholder Engagement
 - Proposes engagement with Maine, US, and international stakeholders, provides example lists
 - Will conduct one on one interviews with key stakeholders as directed by GEO
 - At least 2 public webinars; one following study kick off, and one following initial drafting findings.
3. DSO Study Part I Assessment
 - Review of current regulatory structure and progress to meet each policy objective
 - Review of different DSO models, at minimum including: Total DSO and Dual Participation DSO
 - Includes assessment of how one or more DSO models may be cost effectively and expeditiously integrated in the regulatory and stator context in Maine
 - Include survey of qualitative and quantitative benefits from other DSO examples in other jurisdictions
4. DSO Study Part I Deliverables
 - Aligned with RFP
5. DSO Study Part II
 - Yes
6. Implementation – Work Plan
 - Project kick off mid Feb 2024
 - Study completion March 2025

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Strategen Consulting

DATE: 2/7/24

EVALUATOR NAME: Bob Snook

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization describing their qualifications and three project examples
 - Strategen Consulting (SC) is a worldwide energy consulting firm. SC has experience with DSOs and DERs and has worked in New England (Maine and Massachusetts).
 - Project 1. SC worked with NRDC in a docket before the IL PUC involving IL utilities' DER plans.
 - Project 2. SC worked with Ontario's ISO to develop a T-D interoperability plan which includes a DSO.
 - Project 3. SC worked with Australia to address the massive influx of DERs and IBRs in that country and the development of a DSO.
2. Subcontractors
 - Energy Catalyst
 - Lorenzo Kristov
3. Organizational Chart
 - Yes. Detailed CVs of team as well.
4. Litigation
 - None in last five years.
5. Certificate of Insurance
 - Yes.

II. Proposed Services

1. DSO Study Part I Discovery
 - SC will use its experience with ME, ISO-NE and worldwide and will conduct a literature review of plans and documents from utilities, NMISA, New England state policies.
 - SC will review DSO practices from places that SC has worked on and gather relevant information.
2. DSO Study Part I Stakeholder Engagement
 - SC will rely on its work in ME and elsewhere to develop a list of stakeholders and then it will develop a stakeholder engagement process with public meetings and prepared questions and at least two webinars.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

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DATE: 2/7/24

EVALUATOR NAME: Bob Snook

EVALUATOR DEPARTMENT: Governor's Energy Office

3. DSO Study Part I Assessment
 - SC will initially review the current utility structure and grid function.
 - SC will assess how one or more DSO models can meet the goals of reducing costs, improving reliability and meeting ME climate goals.
 - SCs will provide a high-level study to provide the information needed should the decision be made.
4. DSO Study Part I Deliverables
 - A final report.
 - Presentation deck.
 - Excel datasets
 - Available to brief legislature.
5. DSO Study Part II
 - Note: Study Part II will be undertaken only if the GEO determines, based on Study Part I, that a DSO could achieve the objectives of the Act.
 - Based on final feasibility report, SC will prepare a plan for implementation including the legislative and regulatory changes needed, tariff changes, costs and organizational changes.
6. Implementation – Work Plan.
 - Detailed chart with identified tasks and time schedule.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Strategen

DATE: 2/12/24

EVALUATOR NAME: Claire Swingle

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

I. Organization Qualifications and Experience

1. Overview of Organization

- Consultancy firm founded in 2005, minority and woman-owned
- Grid modernization expertise, including DSO models with subcontractors
- Prior experience with GEO

2. Subcontractors

- Energy Catalyst – systems architecture for Australia's national electricity market
- Lorenzo Kristov – grid architecture expert, has written extensively on design of DSO

3. Organizational Chart

- Provided with staff identified
- Engineer on the team, Australia systems architect expert, other DSO expert

4. Litigation

- Attests that there is no litigation

5. Certificate of Insurance

- Provided; \$2m for each occurrence

6. Past Projects

- Some maine involvement, relevant experience, high quality subcontractors
- NRDC – expert witness testimony in Ameren and Commonwealth Edison's grid plans (grid operations, smart inverter settings, flexible interconnection)
- Independent Electricity System Operator, Ontario, Canada – prepared a transmission-distribution interoperability framework to guide IESO/ compare alternative DSO models (functional capabilities, capabilities of different models, system actors, conceptual design for shared data platform)
- CSIRO Australia – develop (with Energy Catalyst) system architecture for Australia's national electricity market to guide transition
- Additional projects mentioned:

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Strategen

DATE: 2/12/24

EVALUATOR NAME: Claire Swingle

EVALUATOR DEPARTMENT: Governor's Energy Office

1. Energy System Integration Group – developed reports on how DERs could be integrated into wholesale markets/assessing DSO models in UK and Australia
2. NARUC/NASEO Taskforce – designing integrated resource-distribution-transmission planning process
3. Grid Modernization Advisory Council (Massachusetts) – supported establishment and review of plans

II. Proposed Services

1. The Strategen approach proposes that the credibility and defensibility of any assessment of DSO policy outcomes requires consideration of the structural or 'architectural' relationships between proposed DSO model(s) and the evolving power system and stakeholder ecosystem
2. DSO Study Part I Discovery
 - Maine/regional review, including current grid planning operational practices, DER market incentives
 - Other DSO models
 1. Cites grid planning in MA, IL, NY
 2. Identifies several Australian and Canadian examples
3. DSO Study Part I Stakeholder Engagement
 - Familiarity with Maine landscape
 - One on one interviews, stakeholder list initially identified
 - "engage" U.S. based stakeholders (grid technology companies, gridlab, Maryland PSC, CPUC staff, etc.)
 - "Engage" with international stakeholders in UK, Australia, Canada
 - Public webinars
4. DSO Study Part I Assessment
 - Regulatory assessment
 - Review of different DSO models
 - Mostly qualitative/high-level, with comprehensive cost benefit analysis to be conducted in Part 2 of the study
 - Survey of qualitative/quantitative benefits available from previous DSOs
5. DSO Study Part I Deliverables
 - Complete, per the RFP
6. DSO Study Part II
 - Affirms capabilities

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Strategen

DATE: 2/12/24

EVALUATOR NAME: Claire Swingle

EVALUATOR DEPARTMENT: Governor's Energy Office

7. Implementation – Work Plan
 - Provided, gaant chart

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 2023122448

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

BIDDER NAME: Strategen Consulting, Inc.

DATE: 2/12/2024

EVALUATOR NAME: Ethan Tremblay

EVALUATOR DEPARTMENT: Governor's Energy Office

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Globally connected, impact-driven firm on a mission to decarbonize energy systems.
 - Founded in 2005.
 - Certified minority and woman-owned business.
 - Prior experience supporting GEO in utility rate case proceeding.
 2. Subcontractors
 - Energy Catalyst – all required information provided
 - Lorenzo Kristov – all required information provided
 3. Organizational Chart
 - Provided with staff names only
 4. Litigation
 - Statement provided
 5. Certificate of Insurance
 - Provided
 6. Past Projects
 - Natural Resources Defense Council - Strategen conducted a comprehensive review and provided expert witness testimony regarding each utility's integrated grid planning and grid operations processes with the goal of integrating and fully utilizing DERs. Strategen made several recommendations regarding grid planning, hosting capacity analysis, value of DER analysis, non-wires alternatives, and access to customer, system, and market data. Strategen also made several recommendations regarding grid operations, smart inverter settings, flexible interconnection, DER control strategies, and the use of emergent technologies, including advanced metering infrastructure (AMI), advanced distribution management systems (ADMS), and distributed energy resource management systems (DERMS). Finally, Strategen supported the Joint NGOs during in-depth technical discussions with the utilities throughout the proceedings, which led to positive settlement terms on several topics.
 - Independent Electricity System Operator, Ontario - Prepared a report, "Development of a Transmission-Distribution Interoperability Framework" (May 2020), to inform and guide Ontario's Independent

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Electricity System Operator's (IESO) efforts to specify and compare alternative distribution system operator (DSO) models and frameworks for market and operational coordination between distribution utilities and the bulk system/wholesale market operator (IESO).

- CSIRO (Australia's national science agency) - In this unique 'postcard from the future' context, Strategen and Energy Catalyst were commissioned to develop a world-first Systems Architecture for Australia's National Electricity Market (NEM) to guide its transition. Supported by an international expert panel from the United States, the United Kingdom and the European Union, this work interrogates in detail the integrated transition pathways from the grid's legacy past to its very high-VRE / high-DER future. As critical functions in such future power systems, DSO models and their wider system relationships were considered in detail.

II. Proposed Services

1. DSO Study Part I Discovery

- Compile and review relevant information related to objectives, current practices and operations, policies and programs
- Jurisdictional review focuses on US – MA, IL, NY examples – Australia, Canada (Ontario), UK, and EU

2. DSO Study Part I Stakeholder Engagement

- Proposes structured engagement with Maine stakeholders, including example list; other US stakeholders; and international stakeholders
- Engagement designed to obtain feedback, obtain information, and guide priorities
- Two webinars, one at kickoff and one at draft results

3. DSO Study Part I Assessment

- Identifies two potential assessment frameworks consistent with the Resolve
- Proposes high-level qualitative and quantitative assessment using survey of examples from previous and ongoing related efforts in other jurisdictions

4. DSO Study Part I Deliverables

- All deliverables provided as specified

5. DSO Study Part II

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- Discussed throughout
 - Part 2 approach description provided
6. Implementation – Work Plan
- Provided as specified
 - Feb 2025 final report proposed



Janet T. Mills
Governor

GOVERNOR's ENERGY OFFICE

Dan Burgess
Director

AGREEMENT AND DISCLOSURE STATEMENT RFP #: 202312248

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

I, Allie Rand, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Governor's Energy Office. 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

2/6/2024

Date



Janet T. Mills
Governor

GOVERNOR's ENERGY OFFICE

Dan Burgess
Director

AGREEMENT AND DISCLOSURE STATEMENT RFP #: 202312248

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

I, Ethan Tremblay, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Governor's Energy Office. 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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February 5, 2024

Signature

Date



Janet T. Mills
Governor

GOVERNOR's ENERGY OFFICE

Dan Burgess
Director

AGREEMENT AND DISCLOSURE STATEMENT RFP #: 202312248

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

I, Robert Snook accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Governor's Energy Office. 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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/s/ Robert Snook
Signature

2/5/24
Date



Janet T. Mills
Governor

GOVERNOR's ENERGY OFFICE

Dan Burgess
Director

AGREEMENT AND DISCLOSURE STATEMENT RFP #: 202312248

RFP TITLE: Evaluating the Establishment of a Distribution System Operator in Maine

I, Claire Swingle accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Governor's Energy Office. 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

2/5/24

Date