

Unsolicited Proposals By Stakeholders and Interested Parties

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Overview

- Process applies to any proposals requiring “significant” PA commitment of funds or personnel from:
 - Stakeholders
 - Private companies or individuals
 - Non-profits
 - Community Groups
 - Associations
 - Local Government
- Process does not apply to proposals from:
 - State or federal agencies; handled individually on a case-by-case basis

- Third party contacts a PA or DOER with an “idea” and an intent to request a significant time or money commitment from the PAs.
- Request is forwarded to RMC or C&IMC for review & consideration.
- Response is sent to the party within five working days outlining the process including:
 - Explanation of the process and why it is needed, as well as the basic requirements of funding (e.g., payment for savings not activity)
 - Process flow chart and timelines
 - Outline of requirements for initial written “letter proposal”
- The third party submits letter proposal synopsis (by deadline), two weeks prior to the quarterly review.



Process

- Proposals are reviewed quarterly by the appropriate committee (RMC or C&IMC)
 - Committees offer conditional approval or deem as not warranting approval
 - Those not approved receive a letter stating such within 10 working days
 - Conditionally approved proposals required to submit detailed proposal including a work plan with timelines, budgets, deliverables, etc.
- Process for formal proposals handled on case-specific basis based on negotiations between the proposing party and the PAs
- NOTE: Technology-specific proposals are managed and assessed by the Massachusetts Technical Assessment Committee (“MTAC”) and follow a different process.



Proposal Requirements

- Each formal proposal must include the following elements:

Objective: Overview of proposal; Opportunity, concern, gap, or problem to be addressed; Target market.

Approach: New and innovative designs, partnerships, concepts, measure mixes, marketing strategy, incentive strategy etc.

Value Add:

Potential to acquire verifiable cost effective savings at a lesser or equal cost to current program delivery models, and how those savings will be verified. How the proposal complements or improves existing programs in terms of market uptake, depth of savings, cost-effectiveness, etc.

Cost: Proposal implementation costs, vendor's fee structure

Measures for success: Specific goals, objectives and outcomes, expected participation, savings and costs.

Examples

- Powering Pittsfield and Northampton
 - Early use of the Unsolicited Proposal process
 - Very useful in coaching submitters to define goals and measurement strategies to gauge success.
 - Example: original goal of “raising energy awareness” replaced with documentation of therm and kWh savings.
 - This measurement strategy was used as the basis for determination of success of goals identified by the submitters.
 - Ultimately led to the unmistakable conclusion that goals had not been achieved and further funding was not warranted.
- The Massachusetts Ice Rink Energy Savers Program
 - Proposal not accepted for further consideration
 - Existing initiatives and agreements, particularly with DCAMM and DCR, already serve this market need. Additionally, PAs have MOUs in place with many large educational organizations who own/operate these facilities. Other, non-educationally owned facilities already active participants in existing programs.
 - PAs will work with proposer through existing programs