# Scope of Services for GMAC Consultant

# OVERVIEW

The DOER, acting on behalf of the GMAC, is seeking technical consulting services for the purpose of reviewing, assessing, and making recommendations related to 2024 Electric-Sector Modernization Plans (ESMPs) developed by the Massachusetts electric distribution companies (EDCs). The selected Contractor will be a crucial partner and resource in helping the GMAC achieve and fulfill its obligations as they relate to reviewing and providing recommendations on the ESMPs. The selected Contractor will assist the GMAC in advancing its priorities as set forth in the Scope of Work and in various GMAC resolutions issued regarding the 2024 ESMP. GMAC priorities include but are not limited to the following:

* Encourage least-cost investments in the electric distribution systems,
* Encourage alternatives to the investments or alternative approaches to financing investments that will facilitate the achievement of the statewide greenhouse gas emission limits and sublimits under chapter 21N
* Increase transparency and stakeholder engagement in the grid planning process.
* Monitor and ensure the EDCs’ progress toward the ESMP timelines and strategies.

The selected Contractor will serve as a resource for the GMAC members to facilitate the GMAC understanding of the electric-sector modernization plans, goals, and outcomes. The selected Contractor shall also support the Council’s planning role in establishing priorities and goals for future ESMPs. Other responsibilities include developing and maintaining the GMAC website and other communication materials for the GMAC. The selected Contractor shall develop work plans and budgets for technical services to the GMAC (generally on an annual basis). DOER will manage the Contractor’s work, on behalf of the GMAC.

# SCOPE OF WORK AND DELIVERABLES

The selected Contractor will provide technical consulting services for the purpose of reviewing, assessing, and making recommendations related to the ESMPs proposed by the Massachusetts EDCs. Services to be provided are described in detail below and fall within the following general service areas:

1. Technical support
2. Evaluation and monitoring
3. Administration, coordination, and communication
4. Strategic planning

Proposals will be considered that include either the entire Scope of Work or select task(s) as specified within the Scope of Work. Each respondent must specify in its response which task(s) its proposal addresses. DOER may select one or more respondents to provide the services specified in this RFQ. DOER prefers team applications, or applications with specified subcontractors, where a single applicant would otherwise not adequately demonstrate experience in both the administrative AND technical areas.

## Technical Support regarding the GMAC’s Review of the Electric Sector Modernization Plans

1. Review and analyze the EDC ESMPs submitted to the GMAC on September 1st, 2023.
2. Clearly and transparently present recommendations and key observations on the EDC ESMPs to the GMAC for GMAC discussion and review. Recommendations should be made to ensure that the ESMPs:
   1. maximize customer benefits and demonstrate cost-effective investments in the distr. grid,
   2. support investments to enable interconnection of, and communication with, distributed energy resources and transmission-scale renewable energy resources,
   3. facilitate electrification of buildings, transportation and other sectors,
   4. improve grid reliability and resiliency, and
   5. minimize or mitigate impacts on ratepayers.
3. Present an understanding of Massachusetts distribution system planning, including the ability to speak on relevant procedural history and technical grid knowledge.
4. Review goals, plans, program designs, associated budgets, cost allocation proposals and/or performance incentives or penalties.
5. Review and recommend key performance indicators and equity metrics, program tracking data, program strategies and tactics.
6. Review and describe the impact of the draft ESMPs on Massachusetts long-term climate requirements.
7. Review and describe the equity impacts of programs and investments proposed in the ESMPs.
8. Review and describe the cost-efficiency of programs and investments proposed in the ESMPs.
9. Work with DOER as the GMAC Chair, EDCs, and GMAC members where relevant to develop presentations and written materials on recommendations. Communicate ideas and information effectively through oral and written presentations (e.g., Microsoft Office Power Points and Excel Spreadsheets), and other written documents.
10. Coordinate and manage the GMAC recommendations on the draft ESMPs such that the GMAC has a unified set of recommendations ready to provide to the EDCs on their draft ESMPs no later than 80 days after September 1, 2023.
11. Provide technical support, summaries, and updates on the status of the DPU ESMP docket in 2024, including, as needed, support managing information requests intervenors may ask of the GMAC in the discovery process.
12. Present to the GMAC on technical topics related to distribution system planning as needed and within the technical experience of the consultant.

## Evaluation and Monitoring of Electric-Sector Modernization Plans

1. After the DPU issues an Order approving, modifying, or rejecting the ESMPs, anticipated in late 2024, analyze, summarize, and present the findings of the final Order to the GMAC.
2. In accordance with the approved 2024 ESMPs, track and analyze EDC progress on the goals, programs, investments, and plans based on legislatively required biannual reporting process the EDCs must submit to the DPU and Massachusetts Joint Committee on Telecommunications, Utilities and Energy on deployment of approved investments in accordance with any performance metrics. Ensure alignment of ESMP implementation with GMAC priorities.
3. Present results from the legislatively required biannual reporting process to the GMAC and track GMAC feedback, comments, and concerns on the reports.
4. Assess whether EDCs are achieving the goals set forth in their ESMPs and in compliance with 2022 Climate Law and the Department of Public Utilities orders and guidelines.
5. Promptly notify the GMAC of any concerns about achieving plan goals, including the statewide greenhouse gas emissions limits and sublimits, under chapter 21N and any issues surrounding ESMP planning, implementation, or evaluation.
6. Communicate ideas and information effectively through oral and written presentations (e.g., Power Points), spreadsheets, and other written documents.
7. Engage in regular communication with GMAC member, including recognizing, distilling, and sharing common issues and concerns with the GMAC.
8. Create and maintain a feedback loop that includes GMAC members and EDCs on all of the above activities.

## Administrative, Coordination, and Communication Services

1. Provide administrative support to the GMAC, including developing and managing agendas and recording meeting minutes at the GMAC and GMAC Executive Committee meetings, and other Committee meetings as required and in accordance with Open Meeting Law requirements. Provide, as needed, support with virtual and hybrid meeting technologies.
2. Provide the GMAC with a quarterly report summarizing the consultant’s activities and progress on its deliverables.
3. Maintain a website for the GMAC that contains current information on all relevant materials, including all GMAC, Executive Committee, and other Committee meeting materials.
4. If a respondent subcontracts any portion of the work, the respondent will coordinate and oversee work, including work performed by subcontractors, to ensure delivery of timely, coordinated services within budget. This should include a designated project manager that monitors and tracks work across subcontractors, reviews and ensures accuracy and appropriateness of subcontractor invoices and expenses, communicates directly with DOER, and is responsible for timely and concise reporting on consultant activities to the GMAC.
5. Manage public comments,
6. Communicate ideas and information effectively through oral and written presentations (e.g., Microsoft Office Power Points and Excel Spreadsheets), and other written documents.
7. Coordinate with the GMAC members in order to monitor ESMP implementation and ensure alignment with Council priorities and Massachusetts greenhouse gas emissions reduction goals.

## Strategic planning

1. Beginning in 2025, work with the GMAC to develop a strategy and recommendations for the second ESMP process and GMAC review of the second ESMPs, anticipated in late 2028.
2. Recommend best practices for integrated distribution system planning to assist the Massachusetts EDCs for inclusion in their ESMPs. Best practices should include but not be limited to items that:
   1. Improve grid reliability, communications and resiliency;
   2. Enable increased, timely adoption of renewable energy and distributed energy resources;
   3. Promote energy storage and electrification technologies necessary to decarbonize the environment and economy;
   4. Prepare for future climate-driven impacts on the transmission and distribution systems;
   5. Accommodate increased transportation electrification, increased building electrification and other potential future demands on distribution and, where applicable, transmission systems; and
   6. Minimize or mitigate impacts on the ratepayers of the Commonwealth.
3. Identify appropriate metrics to measure and evaluate performance and effectiveness of programs and strategies in the ESMPs that help the Commonwealth realize its statewide greenhouse gas emissions limits and sublimits under chapter 21N.
4. Identify alternatives to the investments or alternative approaches to financing investments that will facilitate the achievement of the statewide greenhouse gas emission limits and sublimits under chapter 21N and increase transparency and stakeholder engagement in the grid planning process.
5. Maintain and update the GMAC website.
6. Create and maintain a feedback loop that includes GMAC members and EDCs on all of the above activities.
7. Communicate ideas and information effectively through oral and written presentations (e.g., Microsoft Office Power Points and Excel Spreadsheets), and other written documents.