

Request for Proposals
NASEO Toolkit for Stakeholder Engagement in Transmission Planning

Solicitation Number: NASEO-2023-RFP-002

Released: September 1, 2023
Responses Due: September 18, 2023

National Association of State Energy Officials
1300 17th Street North, Suite 1275
Arlington, Virginia 22209

Note on applicants' eligibility: All applicants must meet the [DOE Mandatory Requirements and Standard Provisions](#). This includes having a current registration in SAM.gov and providing assurance that applicant is not a debarred or suspended entity.

I. Introduction and Background

As the United States moves towards a more electrified clean energy future, the need for transmission infrastructure expansion and enhancement is paramount. The combination of an aging grid, along with increased frequency of extreme weather events, the need to connect renewable energy resources with energy demand, and the push toward electrification of both buildings and transportation are contributing to the growing need for transmission improvements and expansion. Key to these efforts is meaningful engagement and coordination among communities; state, regional, and federal stakeholders; Tribes; investor-and-consumer owned utilities; and the private sector that facilitates an equitable transmission planning and siting process.

State Energy Offices play an important role in engaging and convening stakeholders and increasing understanding of the economic, resilience, and greenhouse gas (GHG) emissions reduction benefits of transmission projects for their states and communities. As stated in the National Association of State Energy Officials (NASEO) *Board Resolution: Commitment to Equity, Access, and Inclusion*, a priority for NASEO is developing best practices of community engagement to ensure that state energy policies and programs are informed by the needs and perspectives of directly affected communities.

With funding support from the U.S. Department of Energy (DOE) Office of Electricity (OE), NASEO seeks to develop a *Toolkit for Stakeholder Engagement in Transmission Planning (Toolkit)* to enable State Energy Offices to engage stakeholders, with a focus on community-based organizations and community members that are located near potential projects. These tools will be educational in nature and better equip State Energy Offices with the resources to address potential concerns from communities, to convene stakeholders across the project development and implementation spectrum through working groups or advisory committees, and to increase stakeholder understanding of both the direct and indirect benefits of transmission projects for their states and communities. This *Toolkit* will be designed to include guidance on innovative and meaningful transmission planning engagement strategies with case studies and lessons learned from previous projects included.

NASEO seeks a *Consultant* to support this project by working with NASEO to develop a *Toolkit for Stakeholder Engagement in Transmission Planning* for use by State Energy Offices. The *Consultant* will be expected to have knowledge of the programmatic, policy, economic, and community aspects of equitable transmission planning. The *Consultant* should be prepared to address cost, resilience, and equity considerations. Finally, the *Consultant* should have a deep understanding of State Energy Offices' roles, distinct from state regulatory roles, in energy policy and transmission planning across the country.

II. Objectives

The overall objective of the *Consultant* is to work with NASEO to research, draft, revise, and finalize one (1) *Toolkit for Stakeholder Engagement in Transmission Planning* for State Energy Offices.

III. Approach

The *Consultant* will work with NASEO staff to develop one (1) *Toolkit for Stakeholder Engagement in Transmission Planning (Toolkit)*. This *Toolkit* should include case studies and educational material that is outlined in more detail below. The *Toolkit* should be written for non-technical audiences within State

Energy Offices (primary audience). Other state entities, such as Public Utility Commissions, governors’ offices, and legislators, will serve as secondary audiences. Content should clearly outline specific actions and best practices for State Energy Offices and include any relevant graphics, tables, or maps.

IV. Statement of Work, Timeline, and Expected Deliverables

It is envisioned that this project will be initiated in 2023. NASEO will host a kick-off meeting with the *Consultant* to discuss the approach for the *Toolkit*. The *Consultant* will be responsible for the following deliverable:

Toolkit for Stakeholder Engagement in Transmission Planning

The *Consultant* will work with NASEO to develop a *Toolkit for Stakeholder Engagement in Transmission Planning* that will:

- Outline opportunities for State Energy Offices’ to engage in transmission planning along with roles of other entities including local governments, state regulators and siting authorities, investor-and-consumer owned utilities, and developers.
- Provide case studies of successful and unsuccessful stakeholder engagement in transmission planning, outlining lessons learned.
- Identify strategies for effective and inclusive stakeholder engagement in transmission planning.
- Highlight stakeholder engagement strategies from other sectors that could be replicated in the transmission space.
- Provide a series of short (one page) educational fact sheets and on key transmission topics that State Energy Offices can use when speaking with and convening stakeholders, including ‘transmission 101’ information as well as relevant federal and regional transmission initiatives.

In addition to the factsheets, the *Toolkit* will be made up of several 2–5-page resources that State Energy Offices can reference separately or as a package depending on their needs and goals.

While NASEO has no page number parameters for the final written product, the product should be brief to be accessible for practitioners while still achieving the intended outcome.

Project Schedule (Estimated)

Task	Estimated Deliverable Date*
Kickoff Meeting with NASEO Staff (and possibly relevant State Energy Offices)	September 2023
<i>Toolkit for Stakeholder Engagement in Transmission Planning</i>	
Outline	October 27, 2023
Review Draft	December 15, 2023
Final Draft	January 31, 2023

** The deliverable timeline may change depending on timeliness of internal and external review. Final document review by DOE may also delay final deliverable date.*

The *Consultant* will develop a draft of the *Toolkit* to be reviewed and commented on by NASEO, DOE, and NASEO members. Based on the comments, the *Consultant* will update the draft and prepare a final version for NASEO (in MS Word format). Upon approval, the *Consultant* will finalize the *Toolkit* for

subsequent publication and distribution by NASEO. The *Consultant* does not have the right to reproduce, utilize portions of, or publish the material from the guide without NASEO's express written permission.

V. Period of Performance

This project is estimated to last from September 6, 2023, through January 31, 2023.

VI. Project Budget

The proposed project budget should reflect a times-and-materials consulting agreement. This is a competitively bid project; costs should be feasible and prudent. The *Consultant* must submit cost proposals by task for the entire Statement of Work using the DOE EERE budget justification spreadsheet which is a separate file available for download [from DOE's website](#). NASEO may request changes to the proposal if the proposed scope exceeds the available budget.

Compensation

The *Consultant* shall invoice monthly for actual work completed. NASEO shall reimburse the *Consultant* for actual milestones achieved and hours spent in the execution of the work (not to exceed the total approved task budget shown in the final contract agreement) once NASEO has received payment from DOE. The *Consultant* will submit a monthly invoice and progress report by the tenth of each month of the agreement.

Rejection of Proposals and Incurred Costs

This Request for Proposals (RFP) does not obligate NASEO to award an agreement. All costs incurred in response to this RFP are the responsibility of the respondent.

NASEO reserves the right to reject any or all submitted proposals not in conformance with this RFP, or for other causes. NASEO reserves the right to request new proposals or to cancel all or part of this solicitation.

VII. Contract Requirements

The funds for this work have been provided through a cooperative agreement between NASEO and DOE's Office of Electricity. The underlying terms and conditions of the cooperative agreement between DOE and NASEO will be provided to the *Consultant* and incorporated in the awarded subcontract. All requirements of the DOE contract shall be controlling, including, but not limited to, federal reporting and the propriety and form of expenses and costs. The contract shall be issued following approval from DOE and will become effective when signed and dated by NASEO and the *Consultant*.

VIII. Responding to the RFP

Please submit responses to the RFP to Catherine Reed by e-mail at . **RFP responses are due no later than September 18, 2023.** Any questions on the RFP should be directed to Catherine Reed by e-mail at atcreed@naseo.org no later than September 14, 2023. All questions received and answers will be posted to the NASEO RFP website.

Responses shall include and fully address the following:

- Cover letter (should include the following):
 - Unique Entity Identification Number
 - SAM.gov registration expiration date

- Assurance that applicant is not a debarred or suspended entity
 - Resumes (please identify any foreign nationals included in the proposal)
 - Description of relevant experience including prior work on energy storage policy and planning as well as working with relevant state agencies (in particular with State Energy Offices)
 - Proposed approach and treatment of the tasks with a view toward expected deliverables
 - Proposed Budget by Task Deliverables
- The budget should be completed using the [DOE EERE budget justification spreadsheet](#). Please note that there is no cost-share requirement, applicants can use either the 3-year or 5-year budget justification and add all costs for their proposal under Budget Period 1.

Please limit the cover letter, the description of relevant experience, and the narrative that addresses the proposed approach and development of the project tasks and proposed budget to **6 pages in 11-point font**. Resumes and the proposed budget do not count toward the page limit.

Note: Late proposals will not be accepted.

IX. Consultant Selection and Required Qualifications

NASEO will select a *Consultant* through a competitive selection, which will include consideration of the following:

- Experience working with State Energy Offices or other relevant state agencies.
- Relevant experience working on programmatic, policy, economic, and community aspects of transmission planning. The *Consultant* should be prepared to address cost, resilience, and equity considerations.
- Relevant experience facilitating equitable community engagement.
- Competitive budget proposal.
- Quality of academic and professional experience in relevant field.
- Flexibility of availability.

The NASEO Evaluation Team will use the following criteria in assessing all responses to this RFP:

Technical Experience and Applicant Qualifications (30% of total score)

- Relevant experience in proposed topics in the energy sector, particularly working with State Energy Offices and other state agencies.
- Adequate level of technical knowledge to meet the demands of the project.
- Quality of academic and professional experience in relevant field.

Proposed Approach for Implementation (40% of total score)

- Proposal responds to the outlined topics in the RFP.
- Existing resources / consultant availability to meet needs of flexible deployment.
- Overall quality and professionalism of the proposal (well written, structured and organized) and materials are provided in the format requested.

Budget (25% of total score)

- Given the scope, is the estimated cost of the proposal appropriate?
- Does overall cost reflect an efficient value for the level of effort?
- Is the level of effort for each task appropriate?

Administrative (5% of total score)

- Does applicant have a Unique Entity Identification Number and a current SAM.gov registration?
- Is the applicant a debarred or suspended entity?