

Request for Proposal

RELEASE DATE: ~~[Insert Date]~~ June 11, 2025

INQUIRY NO.: ~~[Insert Number]~~

DESCRIPTION: Consulting Services for the Evaluation of Billing Systems

RFP COORDINATOR: Ron W. Sizemore
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610-737-0774
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Confidentiality Statement

~~Only those service providers that are invited by~~ The Narragansett Electric Company d/b/a Rhode Island Energy (“RIE” or the “Company”) ~~to bid in~~ invites qualified independent consultants to submit bid proposal(s) (“Proposal”) to RIE for this bidding event (“Bidding Event”) ~~are permitted to submit a bid proposal (“Proposal”)~~. RIE reserves the right to reject any and all Proposals, to waive irregularities in bidding, and to award the contract to a Bidder other than the lowest Bidder.

Any and all commercial documents, designs, drawings, technical data, specifications and other data (collectively, “Bid Documents”) which are accessible as attachments or inclusive within this Bidding Event, are the property of RIE. Bid Documents are loaned to the service provider solely for the purpose of compiling Proposals in response to this Bidding Event. Any Bid Documents (other than those that have been publicly posted by RIE) shall not be disclosed to any third person except for the sole purpose of compiling a Proposal and, in such event, under a written obligation of secrecy. At RIE’s request, or if service provider is unsuccessful in securing an award with respect to the Bidding Event, service provider shall (and shall cause any other parties to which service provider disclosed any such non-public Bid Documents to) (i) promptly erase and/or destroy such Bid Documents, and (ii) immediately upon completion, confirm such erasure and destruction to RIE in writing.

Proceeding with accessing and utilizing the secure website provided by RIE is understood to serve as acknowledgement and agreement by the service provider to the terms of this Confidentiality Statement.



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1. Introduction

We are pleased to invite you qualified independent consultants to submit a Proposal to assist RIE and the State of Rhode Island Public Utilities Commission (“Commission”) in evaluating the operational status, accuracy, and effectiveness of RIE’s electric and gas billing and related systems. This Request for Proposal (“RFP”) is being issued by RIE pursuant to that certain Report and Order (“Order”) issued by the Commission on May 16, 2025 and located at the following link: [PUC Docket No. 25-08-GE Ord25352 5-16-25 w-Seal.pdf](#).

2. Project Overview

A. Services:

RIE is seeking a qualified independent consultant who can assist RIE and the Commission in evaluating the following (collectively, “Services”):

- the operational status, accuracy, and effectiveness of RIE’s electric and gas billing systems (including format, calculations depicted on the bills, and any other information provided on bills that would impact customer’s understanding of how the charges were determined), which systems include:
 - CSS – core billing system
 - Intelligent Desktop – primary agent interface
 - ViewBill – view PDF bills
 - Opentext/Exstream – Storage of bill template
 - Broadridge – print vendor
 - RIEnergy.com – Main utility website
 - Salesforce.com – Solar and Electric Connections portal
- the operation of back-office systems, meter data management system, and any other systems or processes that relate to producing accurate electric and gas bills to customers, which systems include:
 - WATT – back office work item management
 - Meter Data Management System (MDMS) – reading and storage of meter reads
 - FieldNet
 - FSAlign
 - Watt Net Plus – meter inventory management
 - ESG EDI – Supplier data transfer
- the consistency between the kilowatt-hours billed by RIE at retail, and the kilowatt-hours reported by RIE to ISO New England.

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- the reliability of billing systems for purposes of determining billed revenue that is used for financial and rate accounting.

~~If deemed appropriate in RIE's reasonable discretion,~~

RIE ~~shall~~may recommend to the Commission a qualified independent consultant, from the bids submitted (each a "Bidder"), based on RIE's evaluation of the Bidder's qualifications and cost (with priority on the Bidder's qualifications).

The final selection of the Bidder shall be made by the Commission.

RIE shall pay for the Services pursuant to the terms of a professional services agreement to be entered into by the selected Bidder and RIE, as described in Section 2B of this RFP.

B. Form of Services Agreement:

If a contract is awarded to a Bidder under this RFP, such Bidder is expected to enter into, and perform the Services under, a professional services agreement in substantially the form set forth in Appendix B to this RFP ("Services Agreement").

If Bidder proposes any changes to the Services Agreement, Bidder must submit to RIE, on or before the date required by the RFP Schedule in Section 6 of this RFP ("Schedule"), a marked version of the Services Agreement showing any such proposed changes. RIE will presume that Bidders are willing to execute any such marked-up Services Agreement; however, RIE's selection of a Bidder does not constitute RIE's acceptance of any proposed changes in such marked-up Services Agreement. If Bidder does not submit to RIE a marked version of the Services Agreement, RIE will presume that the Bidder is willing to execute the Services Agreement in substantially the form set forth in Appendix B to this RFP. Bidders are discouraged from proposing material changes to the Services Agreement. Bidders acknowledge that the form of Services Agreement is subject to the Commission's review and approval and the Commission may modify the form of Services Agreement in its discretion.

If, prior to issuance of this RFP, Bidder executed an enterprise professional services agreement or other master services agreement with RIE and/or RIE's affiliate, PPL Services Corporation ("Executed Agreement"), Bidder may, at its option, provide RIE with a copy of such Executed Agreement and request approval to utilize the Executed Agreement for the Services in lieu of the Services Agreement. Such submission and request must be made to RIE on or before the date in the RFP Schedule for which Bidder is required to submit proposed changes to the Services Agreement. Such Executed Agreement is subject to the review and approval of the Commission.

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C. Supervision of Consultant:

Bidder shall be supervised by a person designated by the Commission from among the staff at the Commission (“Commission Staff Designee”). The Bidder shall ~~provide periodic updates to the~~ cooperate and engage with the Commission Staff Designee, and to develop any necessary adjustments to the Bidder proposed work plan and, subsequently, including, without limitation, (i) providing the Commission Staff Designee with periodic progress updates regarding the Services at such times, and including such content, as may be requested by the Staff Designee to Commission Staff Designee which may include participation in meetings. The meetings may include the Company and Division Staff Designee at the Commission Staff Designee’s discretion and, (ii) at the request of the Commission Staff Designee, examine specific billing issues of a limited number of specific customer accounts identified by Staff Designee the Commission Staff Designee. All written documentation Bidder delivers to the Commission Staff Designee shall be treated as confidential during the pendency of Bidder’s review, subject to any orders of the Commission determining that any such documentation is not subject to confidentiality under APRA (as defined in Section 4 below). A ruling on a final grant of confidentiality will occur following submission of the Report.

Additionally, at the request of the Division of Public Utilities and Carriers (“Division”) to the Commission, the Division may designate a non-lawyer staff member from the Division to (i) engage with ~~Commission’s~~ the Commission Staff Designee to follow progress of Bidder’s review, (ii) participate in meetings, at the Commission Staff Designee’s discretion, that the Commission Staff Designee may have with Bidder and Company; and (iii) make recommendations to the Commission Staff Designee.

D. Coordination with RIE:

The Bidder shall engage with RIE directly, including any personnel and contractors of RIE who have detailed knowledge of the operations, design, and implementation of the billing systems, and related systems, or personnel and contractors who are otherwise identified by the Commission Staff Designee as reasonably needed for the review.

Subject to the Commission’s review and approval of a reasonable confidentiality agreement (or the confidentiality terms in the Services Agreement or Executed Agreement) that does not constrain the purposes and duties of the consulting firm as described in the Services, RIE will provide reasonable access to those systems and data bases described in Section 2A of this RFP and any other systems and data bases that relate to matters pertaining to the Services.

Subject to the terms of the Services Agreement or Executed Agreement entered into by RIE and Bidder for the Services, RIE shall cooperate fully with the selected Bidder.

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E. Deliverable:

Bidder shall provide to RIE and the Commission a final written report with its findings, including (“Final Report”):

- Conclusions regarding accuracy and effectiveness of RIE’s billing systems;
- Conclusions regarding reliability of systems for determining billed revenue for financial and accounting purposes;
- Problems identified by RIE, resolutions implemented, and status of issue;
- Identification of problems that still need to be corrected, if any;
- Recommendations for repairs or improvements; and
- Any other recommendations pertinent to the findings from the review.

Bidder shall draw its own conclusions for the Final Report independently of RIE; provided, however that:

- RIE may review and comment upon a draft of the Final Report before the Final Report is issued to the Commission, but RIE will have no authority to direct the content of the Final Report; and
- Bidder has no obligation to change the Final Report in response to RIE’s comments.

The Final Report shall be due to RIE and the Commission by the later to occur of (i) October 1, 2025 or (ii) such date that is extended by Order of the Commission, in the Commission’s discretion.

F. Commission Testimony:

A representative of Bidder may be required to appear before the Commission to testify at formal public evidentiary hearings, if needed, as determined by Commission.

3. RFP Terms

- RIE is not liable or responsible for any costs or expenses incurred by the Bidder in responding to this RFP whether or not a contract is awarded and executed.
- RIE reserves the right to negotiate with any and all Bidders, has no obligation to enter into a contract with any Bidder; and may terminate or modify this RFP, within its sole discretion, at any time without liability or obligation to any Bidder. RIE may

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choose to accept or reject proposals without explanation, subject to the review and approval of the Commission.

- RIE anticipates making one award for this RFP.
- The timely and proper submission of proposals is critical. However, RIE reserves the right to consider proposals, or modifications thereof, received after the deadline, but before an award is made, should such action be deemed by RIE to be in its best interests, subject to the review and approval of the Commission.
- RIE may recommend to the Commission that a contract be awarded to the Bidder whose Proposal conforms best to this RFP, and is viewed by RIE and the Commission to be the most advantageous to the objectives set forth in this RFP.
- RIE may award a contract based on initial proposals received, without further negotiation. Therefore, each initial Proposal should contain the Bidder's best (and final) terms from a cost and services perspective.
- RIE reserves the right to amend this RFP, including due dates, during the solicitation, evaluation, and selection process, subject to the review and approval of the Commission. Any changes will be communicated to all Bidders in writing.
- Proposals are to be priced in U.S. Dollars without ties to any foreign currency conversions or escalation provisions for the duration of the services agreement term.
- Bidder's Proposal shall remain valid for a period of not less than ninety (90) days from the date Proposals are required to be submitted to RIE as set forth in the Schedule.
- RIE reserves the right to request additional information from Bidder after receipt of its Proposal.

4. Confidentiality

The Commission ~~and the Division~~ will receive confidential and non-confidential information provided by Bidders under this RFP including, without limitation, each Proposal, each scoring sheet, and RIE's Bidder recommendation all of which may be filed with the Commission. The Commission will grant preliminary confidential treatment to such information, and Bidders are advised that the Commission intends to grant confidential treatment to trade secrets and commercial or financial information obtained from a person, firm, or corporation that is of a privileged or confidential nature. The Commission must comply with Rhode Island's Access to

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Public Records Act (“APRA”) R.I. Gen. Laws Sec. 38-2-1 through 38-2-15. Should the Commission need to revisit its decision, the Bidder will be notified and granted an opportunity to explain why the information should remain exempt from disclosure under the APRA.

If any information contained in the Proposal ~~is confidential~~contains information that qualifies for confidential treatment pursuant to Rhode Island’s requirements, Bidders must submit both a public version and a confidential version of the Proposal, with each version of the Proposal clearly identified. The public version of the Proposal should include the words “Public Version,” and may be redacted to remove such information that qualifies for confidential treatment pursuant to Rhode Island’s requirements.

RIE agrees to use commercially reasonable efforts to treat the non-public information it receives from Bidders in a confidential manner. RIE will not, except as required by law or in a regulatory proceeding, disclose Bidder’s non-public information to any third party other than the Commission and the Division (and their respective agents and/or consultants), or use such information for any purpose other than in connection with this RFP.

~~The Commission and the Division will receive confidential and non-confidential information provided by Bidders under this RFP. Bidders should be aware that the Commission and Division may be required to disclose confidential information in response to a public records request, in accordance with the “Access to Public Records Act,” R.I. Gen. Laws § 38-2-1 et seq. APRA. RIE shall not be liable for, and, by submitting a Proposal, Bidders waive, release, and hold RIE harmless from and against any and all liability in connection with, a release of any of Bidder’s confidential information by the Commission, Division, or any other governmental agency.~~

5. Instructions and Information to Bidder

- Bidder’s Proposal must be submitted via Infor: pursuant to RIE’s instructions. Bidder must also submit 1 electronic copy to the RFP Coordinator, Ron W. Sizemore (rsizemore@pplweb.com).
- Bidder’s Proposal must be submitted in the order described in the format provided below. Do not reorder the flow and sequence of the Proposal.
- Bidder’s Proposal must respond to all provisions of the RFP; failure to do so may result in the rejection of Bidder’s Proposal.
- ~~This RFP may not be distributed, reproduced, or advertised for any purpose without RIE’s prior written permission.~~

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- Any information provided to Bidders by RIE is proprietary information, and must be used solely for the purpose of responding to this RFP or, if applicable, providing the Services.
- Please submit specific RFP questions to the RFP Coordinator, Ron W. Sizemore (rsizemore@pplweb.com), on or before the date required in the Schedule using the “Questions and Clarifications” form located in the Appendices. Questions will be answered, without attribution, to all potential Bidders.
- Bidder’s contact with RIE regarding this RFP, and any subsequent negotiations, is restricted to the RFP Coordinator. Bidder must not attempt to contact or influence any RIE or Commission personnel outside of this RFP process.
- By submitting a Proposal, the Bidder authorizes RIE, as part of the Proposal evaluation, to conduct reference checks and background inquiries concerning the named individuals proposed by Bidder and to verify capabilities and experience. At the request of RIE, Bidder shall provide contact information from such references.

6. RFP Schedule

The Schedule for this RFP and subsequent contract award is summarized below. RIE reserves the right, in its sole discretion, to modify this Schedule to meet RIE’s and/or the Commissions’ requirements.

Task	Estimated Date
RFP Released	<u>June 11, 2025</u>
Questions from Bidders Due	[7 days after RFP Released] <u>June 18, 2025</u>
RIE Responds to Bidders’ Questions	[11 days after RFP Released; 4 Days after receipt of questions] <u>June 23, 2025</u>
Marked version of Services Agreement Due (and, if applicable, copy of, and request to use, Executed Agreement)	15 days after RFP Released <u>June 26, 2025</u>
Proposals Due to RIE	[30 days after RFP Released] <u>July 11, 2025</u>
RIE to Submit any Recommendation(s) to Commission	[40 days after RFP Released] <u>July 21, 2025</u>

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Task	Estimated Date
Commission Approval/Disapproval of Proposal	[50 days after RFP Released] <u>July 31, 2025</u>
Bidder Notification and, if applicable, Services Agreement Executed, or purchase order issued under Executed Agreement)	[60 days after RFP Released] <u>August 11, 2025</u>

7. Bidder Requirements

Proposals must be submitted through RIE’s Infor System pursuant to RIE’s instructions, and one electronic copy of the Proposal must be sent to the RFP Coordinator (as noted above). Proposals must be clearly labeled and contain the following, in the following order:

- A. Cover Letter: Bidder shall identify that Bidder is responding to this RFP and include the signature of the president, executive director or principal owner of the Bidder’s organization.

- B. Description of Bidder: Bidder shall describe its organization Including:
 - Bidder’s legal entity name
 - Bidder’s physical and website address
 - Nature of Bidder’s business
 - Ownership and Organizational structure including parent company (if any), key management personnel, year of incorporation, state where incorporated, and type of business (non-profit with 501(c)(3) status, for-profit, etc.)
 - Number of permanent employees
 - Basic financial information for the previous 3 years
 - Occupational Safety and Health Act (“OSHA”) Recordable incidents for the past three years
 - Whether Bidder is a “disadvantaged business” which includes minority-owned, veteran-owned, women-owned, persons-with-disability-owned or small companies.

- C. Qualifications of Bidder: Bidder must clearly state why the Bidder should be the chosen service provider to perform the Services including:
 - Details of Bidder’s previous experiences, including examples, that support and highlight Bidder’s abilities to successfully manage and deliver on the Services and the measures of success
 - What uniqueness and competitive advantage the Bidder has over its competitors

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- A minimum of 2 references for RIE to reach out to with contact info
- D. Past Work with RIE or its Affiliates: Bidder must identify any current or past work, over the past ten (10) years, that Bidder has provided to PPL Corporation, RIE, or any of their subsidiaries or affiliates.
- E. Project Management: Bidder should identify key personnel to be assigned to the Services including:
- A description of such individual's primary responsibilities in a brief biography (one paragraph)
 - a maximum two (2) page resume that describes such individual's experience and qualifications

At a minimum, a full-time project manager and a project executive must be named.

- F. Work Plan: Bidder must submit a draft plan as part of its Proposal to demonstrate its understanding of the objectives requested in this RFP. The plan must clearly identify any tasks that Bidder expects RIE to undertake. The plan should detail major milestones, dependencies, critical path, and the activities required to complete the Services. Each objective should have one or more deliverable tasks and details of activities needed to meet each task. Bidders should be as specific as possible. Additionally, Bidders should provide a description of their broad strategy to accomplish the objectives of this RFP.
- G. Cost Proposal; Templates: Bidder must complete all applicable templates included in this RFP including:
- Cost area breakdown (e.g., deliverables and milestones). Please submit using the "Cost Area Breakdown" form located in the appendices. Bidder may describe multiple deliverables or may submit this template described as lump sum for all deliverables. Expenses shall include, without mark-up, all traveling, lodging, meals, etc.
 - Hourly rate schedule for all personnel (including subcontractors). Premium costs because of overtime work shall not be billed nor reimbursed. Please submit using the "Rates and Resource Schedule" form located in the appendices.

All software tools and fees required for Bidder to perform work must be identified in Bidder's Proposal including, but not limited to, proprietary or commercially available products such as data conversion tools.

- H. Subcontractors: If any subcontractors will be used for the Services, they must be identified and described as requested in Appendix A.

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- I. Portfolio of Relevant Work: Bidder should include examples that demonstrate Bidder's ability to perform the Services.
- J. General Administration and Management: Bidder should include Disclosures, Legal Claims, and relevant Financial Information (last three years of Income Statements).
- K. Services Agreement: Bidder should include a fully executed Services Agreement (which may include requested changes shown in the marked-up version of the Services Agreement previously provided to RIE), and, if applicable, any Executed Agreement.
- L. Artificial Intelligence: Bidder should include a detailed description of any Artificial Intelligence software, tools, or technologies ("AI") that Bidder intends to utilize in connection with the Services, including, without limitation, any natural language processing, deep learning algorithms, machine learning models, Generative AI, or Machine Learning Technologies. Bidder is not permitted to utilize AI in connection with the Services, unless Bidder's use of such AI has been approved by RIE in consultation with the Commission Staff Designee. Bidder's proposed use or non-use of AI will not be considered or scored as part of the bid evaluation criteria described in Section 8 of this RFP.

8. Bid Evaluation Criteria

Proposals will be evaluated based on a weighted scoring system to ensure a fair and comprehensive assessment. The evaluation will consider both cost and qualifications, among other factors. Cost will account for 35% of the total score, with emphasis on overall value and cost-effectiveness. Qualifications will also represent 35% of the total score, including the Bidder's relevant experience, technical expertise, and demonstrated ability to perform the required services. Additional criteria will include the proposed approach and methodology (20%), references from past clients (5%), and compliance with the RFP requirements and acceptance of the Services Agreement or Executed Agreement (5%). The proposal receiving the highest total score based on these criteria will be considered the most advantageous to RIE.

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Appendix A: Subcontractor Information

Bidders must complete this Section as it relates to any proposed subcontractor(s). If an item does not apply, indicate so with an “N/A” (not applicable).

1. Subcontractor Company Profile:

- a. Provide a brief history of the subcontractor(s) including a summary of all products and services offered.
- b. Provide the number of years the subcontractors(s) has been in business.
- c. Provide the address and phone number of the U.S. based corporate office(s).




2. Subcontractor Organizational Information:

- a. Provide a profile of the subcontractor(s) organization
- b. Organizational Chart for the division of the company(s) directly responsible for the Services. Indicate total employees in the development, sales, support and service (implementation support) departments.

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Appendix B: Attachments

Attachment section. Below are the required forms and RIE supplemental information.

Questions from Bidders	 Bidder Questions Template - PPL Service
Cost Area Breakdown	 Cost Area Breakdown - RIE Bill
Rates and Resource Schedule	 Rate and Resource Schedule - RIE Billing
Professional Services Agreement	

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Appendix B: Questions from Bidders

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Appendix B: Cost Area Breakdown

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Appendix B: Rates and Resource Schedule

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Appendix B: Professional Services Agreement