

State of Maine
Master Score Sheet

RFP# 202401007					
Electric Rate Case Consultant for the Maine Public Advocate					
Bidder Name:		C.H. Guernsey and Company	Exeter Associates, Inc.	Larkin & Associates, PLLC	PMG Consulting, LLC
Proposed Cost:		\$282,805	\$33,775	\$85,000	\$144,450.00
Scoring Sections	Points Available				
Section I: Preliminary Information	N/A				
Section II: Organization Qualifications and Experience	40	35	35	40	35
Section III: Proposed Services	30	25	30	30	25
Section IV: Cost Proposal	30	4	30	12	7
TOTAL	<u>100</u>	<u>64</u>	<u>95</u>	<u>82</u>	<u>67</u>

Award Justification Statement
RFP# 202401007: Electric Rate Case Consultant for the Maine Public Advocate

I. Summary

The request was for expert witness services in connection with litigation at the Public Utilities Commission regarding a request for a price increase by Versant Power, the electric utility serving eastern and northern Maine.

II. Evaluation Process

The evaluators consisted of the three attorneys in the office assigned to litigate the case in front of the Public Utilities Commission. The evaluators reviewed the proposal independently based upon the qualification and experience, the proposed services, and the work plan presented by four bidders. The evaluators met to develop a consensus regarding how well each bidder individually satisfied these requirements and to establish a consensus score.

III. Qualifications & Experience

All four bidders possessed the required experience to provide the requested services.

The winning bidder's proposal included the following advantages:

- The proposed lead witness has provided equivalent services (i.e., testimony and litigation support on the same issues) in numerous prior proceedings.
- The proposed lead witness has extensive recent experience in similar proceedings.
- Exeter Associates, Inc. is a large organization which will provide any support required to the proposed witness to render services in a complete and timely manner.
- Exeter Associates has identified additional qualified individuals that will be assigned to provide support, as required, to the lead witness.
- Exeter Associates, Inc. and the proposed lead witness each have significant experience in Maine.
- Exeter Associates, Inc. has performed similar services for the Public Advocate that have met the needs of the Public Advocate.

IV. Proposed Services

All four bidders possessed the required experience to provide the requested services, and provided thorough work plans that covered all required services. Key factors in evaluating the proposals included:

- The detail describing the manner in which the bidder would perform the requested tasks.
- The detail with which the bidder described what issues it would study in the litigation and the manner of doing so.

V. Cost Proposal

The cost proposals varied significantly. Exeter Associates, Inc. proposed a price that was substantially below the others. Based on prior engagements using the same vendor, the proposed price appears reasonable to provide the requested services.

VI. Conclusion

Out of 100 possible points, the Evaluation Team awarded Exeter Associates, Inc. a score of 95. The strengths of Exeter Associates, Inc. proposal outweighed the other bidders through both its qualification and experience and the services it proposed. The Evaluation Team has determined the proposal submitted by Exeter Associates, Inc. represents the best value to the State of Maine.



**STATE OF MAINE
OFFICE OF THE PUBLIC ADVOCATE**

**William S. Harwood
Public Advocate**

**Janet T. Mills
Governor**

AWARD NOTIFICATION LETTER

February 22, 2024

Via email: frank.beling@guernsey.us

Frank Beling, Senior Vice President
C.H. Guernsey and Company
5555 N Grand Blvd
Oklahoma City, OK 73112

SUBJECT: Notice of Conditional Contract Award under RFP # 202401007,
Electric Rate Case Consultant for the Maine Public Advocate

Dear Mr. Beling:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Office of the Public Advocate for Electric Rate Case Consultant for the Maine Public Advocate. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

- Exeter Associates, Inc.

The bidder listed above received the evaluation team's highest ranking. The Department will be contacting the aforementioned bidder soon to negotiate a contract. As provided in the RFP, the Notice of Conditional Contract Award is subject to execution of a written contract and, as a result, this Notice does NOT constitute the formation of a contract between the Department and the apparent successful vendor. The vendor shall not acquire any legal or equitable rights relative to the contract services until a contract containing terms and conditions acceptable to the Department is executed. The Department further reserves the right to cancel this Notice of Conditional Contract Award at any time prior to the execution of a written contract.

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 cursive script that reads "William S. Harwood".

William S. Harwood
Maine Public Advocate
State House Station 112
Augusta, ME 04333-0112

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
OFFICE OF THE PUBLIC ADVOCATE**

**William S. Harwood
Public Advocate**

**Janet T. Mills
Governor**

AWARD NOTIFICATION LETTER

February 22, 2024

Via email: jmierzwa@exeterassociates.com

Jerome D. Mierzwa, Vice President
Exeter Associates, Inc.
10480 Little Patuxent Parkway
Suite 300
Columbia, MD 21044

SUBJECT: Notice of Conditional Contract Award under RFP # 202401007,
Electric Rate Case Consultant for the Maine Public Advocate

Dear Mr. Mierzwa:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Office of the Public Advocate for Electric Rate Case Consultant for the Maine Public Advocate. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

- Exeter Associates, Inc.

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**STATE OF MAINE
OFFICE OF THE PUBLIC ADVOCATE**

**William S. Harwood
Public Advocate**

**Janet T. Mills
Governor**

AWARD NOTIFICATION LETTER

February 22, 2024

Via email: tmlarkinassociates@gmail.com

Tina Miller
Larkin & Associates, PLLC
15728 Farmington Road
Livonia, MI 48154

SUBJECT: Notice of Conditional Contract Award under RFP # 202401007,
Electric Rate Case Consultant for the Maine Public Advocate

Dear Ms. Miller:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Office of the Public Advocate for Electric Rate Case Consultant for the Maine Public Advocate. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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William S. Harwood
Maine Public Advocate
State House Station 112
Augusta, ME 04333-0112

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**STATE OF MAINE
OFFICE OF THE PUBLIC ADVOCATE**

**William S. Harwood
Public Advocate**

**Janet T. Mills
Governor**

AWARD NOTIFICATION LETTER

February 22, 2024

Via email: Susan.Mangus@pmgconsults.com

Susan Mangus, Vice President, Operations
PMG Consulting, LLC
9890 Liberia Avenue #1093
Manassas, VA 20110

SUBJECT: Notice of Conditional Contract Award under RFP # 202401007,
Electric Rate Case Consultant for the Maine Public Advocate

Dear Ms. Mangus:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Office of the Public Advocate for Electric Rate Case Consultant for the Maine Public Advocate. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

- Exeter Associates, Inc.

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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.

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William S. Harwood
Maine Public Advocate
State House Station 112
Augusta, ME 04333-0112

STATEMENT OF APPEAL RIGHTS

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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER: C.H. Guernsey and Company

DATE: February 20, 2024

SUMMARY PAGE

Department Name: Office of the Public Advocate

Name of RFP Coordinator: Andrew Landry

Names of Evaluators: Andrew Landry, Susan Chamberlin, Richard Hevey

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• NA		
•		
•		
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	35
Section III. Proposed Services	30	25
Section IV. Cost Proposal	30	4
<u>Total Points</u>	<u>100</u>	<u>64</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER: C.H. Guernsey and Company

DATE: February 20, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER: C.H. Guernsey and Company

DATE: February 20, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	35

Evaluation Team Comments:

- I. Overview of the Organization
 - Broad experience over many relevant areas of expertise
 - Limited demonstration of revenue requirement experience
 - Located in Oklahoma
 - Established in 1928
 - Experienced in assisting consumer advocate agencies
 - Qualified experts Expertise in some utility areas – Midwest and FERC
 - No New England experience
- II. Subcontractors
 - NA
- III. Organizational Chart
 - 4 consultants would be involved – adequate depth
 - Provided – team seems large for scope of assignment
 - Large team would be assigned to this project
- IV. Litigation
 - None
- V. Financial Viability
 - NA
- VI. Certificate of Insurances
 - Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER: C.H. Guernsey and Company

DATE: February 20, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	30	25

Evaluation Team Comments:

A. Services to be Provided

- Thorough description of tasks to be performed
- Services are generally consistent with those requested in RFP
- Some proposed services (eg cost of capital) may be unnecessary
- Scope of Services goes beyond what we requested – RFP was limited to Revenue Requirements
- Deliverables match what we requested
- Some consumer based advocacy thru OK atty general office
- No New England experience

B. Implementation – Work Plan

- Plan covers necessary elements
- Proposed development of Draft Issues List is useful
- Proposed development of Positions Document is useful
- Development of Draft Issues List
- Creation of Positions Document
- Work plan is vague/general

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER: C.H. Guernsey and Company

DATE: February 20, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
33,775	,	250,645	x	30 points	=	4.04

Evaluation Team Comments:

None

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER: Exeter Associates, Inc.

DATE: February 20, 2024

SUMMARY PAGE

Department Name: Office of the Public Advocate

Name of RFP Coordinator: Andrew Landry

Names of Evaluators: Andrew Landry, Susan Chamberlin, Richard Hevey

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• NA		
•		
•		
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	35
Section III. Proposed Services	30	30
Section IV. Cost Proposal	30	30
<u>Total Points</u>	<u>100</u>	<u>95</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER: Exeter Associates, Inc.

DATE: February 20, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Provided.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER: Exeter Associates, Inc.

DATE: February 20, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	35

Evaluation Team Comments:

- I. Overview of the Organization
 - Extensive recent and long term experience in revenue requirement cases
 - Recent work on similar proceedings in New England
 - Previous work in Maine
 - Highly experienced, including working for OPA in Maine - long list of relevant experience
 - Six partners, and 12 employees
 - Experienced in assisting consumer advocate agencies
 - Large team would be assigned to this project
 - OPA team – Jerry Mierzwa, Lafayette Morgan, and Jennifer Rogers (same team as prior engagements), plus research assistants
 -
- II. Subcontractors
 - None
- III. Organizational Chart
 - 3 consultants plus research support – adequate depth
 - Provided – normal Exeter team – perhaps too many for the narrow scope
- IV. Litigation
 - None
- V. Financial Viability
 - NA
- VI. Certificate of Insurances
 - Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER: Exeter Associates, Inc.

DATE: February 20, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	30	30

Evaluation Team Comments:

A. Services to be Provided

- Detailed list of services provided
- Detailed list of issues to be reviewed and concerns that will be explored with respect to these issues
- Experienced in New England
- Experienced with Versant
- Can build off of prior rate case representation
- Scope of Services match what we requested
- Deliverables match what we requested
- Services show familiarity with prior Versant rate case issues
-

B. Implementation – Work Plan

- Work Plan/Tasks cover all necessary areas adequately
- No structured plan provided on how these tasks would be managed
- Detailed work plan
- Identified likely issues for rate case
- Periodic calls with OPA
- Will work with OPA on schedule and deadlines

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER: Exeter Associates, Inc.

DATE: February 20, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
33,775	,	33,775	x	30 points	=	30

Evaluation Team Comments:

None

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER: Larkin & Associates, PLLC

DATE: February 20, 2024

SUMMARY PAGE

Department Name: Office of the Public Advocate

Name of RFP Coordinator: Andrew Landry

Names of Evaluators: Andrew Landry, Susan Chamberlin, Richard Hevey

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
• NA		
•		
•		
<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	40
Section III. Proposed Services	30	30
Section IV. Cost Proposal	30	12
<u>Total Points</u>	<u>100</u>	<u>82</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER: Larkin & Associates, PLLC

DATE: February 20, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Provided.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER: Larkin & Associates, PLLC

DATE: February 20, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	40

Evaluation Team Comments:

I. Overview of the Organization

- Overview of Organization
- Extensive recent utility revenue requirement experience in New England
- Consultants have many years of experience on revenue requirement issues
- Subcontractors
- 8 staff members
- Have utility ratecase experience
- Some New England experience
- CPAs and regulatory consultants
- Concentrates in the area of utility regulation and ratemaking
- Analyzes revenue requirements filed by utilities
- Expert witnesses in over 800 cases
- Headquarters in Michigan
- Project Team – Project Manager/Expert Witness, Senior Regulatory Consultant, Regulatory Consultant, Administrative Assistant

II. Organizational Chart

- 3 Consultants plus support staff – adequate for project

III. Litigation

- None

IV. Financial Viability

- NA

V. Certificate of Insurances

- Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER: Larkin & Associates, PLLC

DATE: February 20, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	30	30

Evaluation Team Comments:

A. Services to be Provided

- Detailed list of services provided
- Detailed list of issues to be reviewed and method of review for each issue
- Reasonable scope of services
- Understands likely issues for rate case
- Scope of Services match what we requested
- Deliverables match what we requested
-

B. Implementation – Work Plan

- Work Plan/Tasks cover all necessary areas adequately
- Detailed work plan
- No prior Versant experience
- Review proposed revenue requirement
- Provide technical analysis of utility rate case filing
- Divide project into multiple tasks
- Provide findings to OPA through telephone discussions

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER: Larkin & Associates, PLLC

DATE: February 20, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	·	Cost Proposal Being Scored	x	Score Weight	=	Score
33,775	·	85,000	x	30 points	=	11.92

Evaluation Team Comments:

None

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER: PMG Consulting, LLC

DATE: February 20, 2024

SUMMARY PAGE

Department Name: Office of the Public Advocate

Name of RFP Coordinator: Andrew Landry

Names of Evaluators: Andrew Landry, Susan Chamberlin, Richard Hevey

<u>Pass/Fail Criteria</u>	<u>Pass</u>	<u>Fail</u>
Section I. Preliminary Information (Eligibility)		
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<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	35
Section III. Proposed Services	30	25
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<u>Total Points</u>	<u>100</u>	<u>67</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER: PMG Consulting, LLC

DATE: February 20, 2024

**OVERVIEW OF SECTION I
Preliminary Information**

Section I. Preliminary Information

Evaluation Team Comments:

Provided.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER: PMG Consulting, LLC

DATE: February 20, 2024

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

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	40	35

Evaluation Team Comments:

- I. Overview of the Organization
 - Overview of Organization
 - Broad experience over many relevant areas of expertise
 - Limited demonstration of revenue requirement experience (only 2 of 3 included in case studies and none in resumes)
 - Reasonable staffing
 - Qualified personnel
 - Disabled Veteran-owned company employing over 50% disadvantaged groups
 - Main office in Indiana, branch offices in DC and N.J.
 - Mission – “Managing Tomorrow’s Challenges Today”
 - Experience in over 1,100 cases
- II. Organizational Chart
 - Provided
 - 4 consultants assigned – adequate depth
- III. Litigation
 - None
- IV. Financial Viability
 - NA
- V. Certificate of Insurances
 - Provided

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER: PMG Consulting, LLC

DATE: February 20, 2024

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	30	25

Evaluation Team Comments:

A. Services to be Provided

- Services consistent with those requested in RFP
- No identification of individual issues or strategy to address
- General description of services
- Unclear what cyber hours are

B. Implementation – Work Plan

- Detail addressing hours anticipated for each task is provided
- No structured plan provided on how these tasks would be managed
- Lacks detail
- Not clear if there's NE experience
- No Versant experience
- Communicate on schedule to be agreed to
- Prepare drafts of written materials
- Assist in proposing case schedule

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER: PMG Consulting, LLC

DATE: February 20, 2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
33,775	,	144,450	x	30 points	=	7.01

Evaluation Team Comments:

None

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER NAME: C.H. Guernsey and Company

DATE: February 13, 2024

EVALUATOR NAME: Andrew Landry

EVALUATOR DEPARTMENT: Office of the Public Advocate

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - Broad experience over many relevant areas of expertise
 - Limited demonstration of revenue requirement experience
 -
 - 2. Subcontractors
 - NA
 - 3. Organizational Chart
 - 4 consultants would be involved – adequate depth
 - 4. Etc. - NA

- II. Proposed Services
 - 1. Services to be Provided
 - Thorough description of tasks to be performed
 - Services are generally consistent with those requested in RFP
 - Some proposed services (e.g. cost of capital) may be unnecessary
 - 2. Implementation – Work Plan
 - Plan covers necessary elements
 - Proposed development of Draft Issues List is useful
 - Proposed development of Positions Document is useful

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER NAME: C.H. Guernsey and Company

DATE: February 16, 2024

EVALUATOR NAME: Susan W. Chamberlin

EVALUATOR DEPARTMENT: Office of the Public Advocate

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Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Qualified experts Expertise in some utility areas – Midwest and FERC -
 2. Subcontractors
 -
 3. Organizational Chart
 4. Etc.

- II. Proposed Services
 1. Services to be Provided
 - Some consumer based advocacy thru OK atty general office
 - No New England experience
 2. Implementation – Work Plan
 - Work plan is general

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER NAME: C.H. Guernsey and Company

DATE: February 15, 2024

EVALUATOR NAME: Richard P. Hevey

EVALUATOR DEPARTMENT: Office of the Public Advocate

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Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Located in Oklahoma
 - Established in 1928
 - Experienced in assisting consumer advocate agencies
 - Large team would be assigned to this project
 2. Subcontractors
 - None listed
 3. Organizational Chart – provided – team seems large for scope of assignment
 4. Litigation – none listed
 5. Licensure/Certification – Managing consultants have P.E. and Ph.D in Economics
 6. Certificate of Insurance – None provided

- II. Proposed Services
 1. Services to be Provided
 - Scope of Services goes beyond what we requested – RFP was limited to Revenue Requirements
 - Deliverables match what we requested.
 2. Implementation – Work Plan
 - Development of Draft Issues List
 - Creation of Positions Document

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER NAME: Exeter Associates, Inc.

DATE: February 13, 2024

EVALUATOR NAME: Andrew Landry

EVALUATOR DEPARTMENT: Office of the Public Advocate

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - Extensive recent and long term experience in revenue requirement cases
 - Recent work on similar proceedings in New England
 - Previous work in Maine
 - 2. Subcontractors
 - NA
 - 3. Organizational Chart
 - 3 consultants plus research support – adequate depth
 - 4. Etc. - NA

- II. Proposed Services
 - 1. Services to be Provided
 - Detailed list of services provided
 - Detailed list of issues to be reviewed and concerns that will be explored with respect to these issues

 - 2. Implementation – Work Plan
 - Work Plan/Tasks cover all necessary areas adequately
 - No structured plan provided on how these tasks would be managed

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER NAME: Exeter Associates, Inc.

DATE: February 16, 2024

EVALUATOR NAME: Susan W. Chamberlin

EVALUATOR DEPARTMENT: Office of the Public Advocate

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Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - 3 dedicated staff
 - 2. Subcontractors
 - 3. Organizational Chart
 - 4. Etc.

- II. Proposed Services
 - 1. Services to be Provided
 - Experienced in New England
 - Experienced with Versant
 - Can build off of prior rate case representation
 - 2. Implementation – Work Plan
 - Detailed work plan
 - Identified likely issues for rate case

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER NAME: Exeter Associates, Inc.

DATE: February 15, 2024

EVALUATOR NAME: Richard P. Hevey

EVALUATOR DEPARTMENT: Office of the Public Advocate

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Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Highly experienced, including working for OPA in Maine - long list of relevant experience
 - Six partners, and 12 employees
 - Experienced in assisting consumer advocate agencies
 - Large team would be assigned to this project
 - OPA team – Jerry Mierzwa, Lafayette Morgan, and Jennifer Rogers (same team as prior engagements), plus research assistants
 2. Subcontractors
 - None proposed to be used
 3. Organizational Chart – provided – normal Exeter team – perhaps too many for the narrow scope?
 4. Litigation – None
 5. Licensure/Certification – None required, but each partner holds an advanced degree in economics or related field
 6. Certificate of Insurance – Provided as Attachment A

- II. Proposed Services
 1. Services to be Provided
 - Scope of Services match what we requested
 - Deliverables match what we requested
 - Services show familiarity with prior Versant rate case issues
 2. Implementation – Work Plan
 - Periodic calls with OPA
 - Will work with OPA on schedule and deadlines

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER NAME: Larkin & Associates, PLLC

DATE: February 13, 2024

EVALUATOR NAME: Andrew Landry

EVALUATOR DEPARTMENT: Office of the Public Advocate

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Extensive recent utility revenue requirement experience in New England
 - Consultants have many years of experience on revenue requirement issues
 2. Subcontractors
 - NA
 3. Organizational Chart
 - 3 Consultants plus support staff – adequate for project
 4. Etc. - NA

- II. Proposed Services
 1. Services to be Provided
 - Detailed list of services provided
 - Detailed list of issues to be reviewed and method of review for each issue

 2. Implementation – Work Plan
 - Work Plan/Tasks cover all necessary areas adequately

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER NAME: Larkin & Associates, PLLC

DATE: February 16, 2024

EVALUATOR NAME: Susan W. Chamberlin

EVALUATOR DEPARTMENT: Office of the Public Advocate

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - 8 staff members
 - Have utility rate case experience
 - Some New England experience
 - 2. Subcontractors
 - 3. Organizational Chart
 - 4. Etc.

- II. Proposed Services
 - 1. Services to be Provided
 - Reasonable scope of services
 - Understands likely issues for rate case
 - 2. Implementation – Work Plan
 - Detailed work plan
 - No prior Versant experience

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER NAME: Larkin & Associates, PLLC

DATE: February 15, 2024

EVALUATOR NAME: Richard P. Hevey

EVALUATOR DEPARTMENT: Office of the Public Advocate

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Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - CPAs and regulatory consultants
 - Concentrates in the area of utility regulation and ratemaking
 - Analyzes revenue requirements filed by utilities
 - Expert witnesses in over 800 cases
 - Headquarters in Michigan
 - Project Team – Project Manager/Expert Witness, Senior Regulatory Consultant, Regulatory Consultant, Administrative Assistant
 2. Subcontractors
 - None
 3. Organizational Chart – See Project Team above
 4. Litigation – None
 5. Licensure/Certification – None required, but CPA certificate provided
 6. Certificate of Insurance – Provided

- II. Proposed Services
 1. Services to be Provided
 - Scope of Services match what we requested
 - Deliverables match what we requested
 2. Implementation – Work Plan
 - Review proposed revenue requirement
 - Provide technical analysis of utility rate case filing
 - Divide project into multiple tasks
 - Provide findings to OPA through telephone discussions

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER NAME: PMG Consulting, LLC

DATE: February 13, 2024

EVALUATOR NAME: Andrew Landry

EVALUATOR DEPARTMENT: Office of the Public Advocate

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - Broad experience over many relevant areas of expertise
 - Limited demonstration of revenue requirement experience (only 2 of 3 case studies and none in resumes)
 - 2. Subcontractors
 - NA
 - 3. Organizational Chart
 - 4 consultants assigned – adequate depth
 - 4. Etc. - NA

- II. Proposed Services
 - 1. Services to be Provided
 - Services consistent with those requested in RFP
 - No identification of individual issues or strategy to address

 - 2. Implementation – Work Plan
 - Detail addressing hours anticipated for each task is provided
 - No structured plan provided on how these tasks would be managed

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER NAME: PMG Consulting, LLC

DATE: February 15, 2024

EVALUATOR NAME: Richard P. Hevey

EVALUATOR DEPARTMENT: Office of the Public Advocate

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Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 1. Overview of Organization
 - Disabled Veteran-owned company employing over 50% disadvantaged groups
 - Main office in Indiana, branch offices in DC and N.J.
 - Mission – “Managing Tomorrow’s Challenges Today”
 - Experience in over 1,100 cases
 2. Subcontractors
 - N/A
 3. Organizational Chart – Provided
 4. Litigation
 - N/A
 5. Licensure/Certification – None required, some listed (P.E., Cybersecurity, Paralegal)
 6. Certificate of Insurance – Provide, Professional liability only

- II. Proposed Services
 1. Services to be Provided
 - Same as listed in RFP
 2. Implementation – Work Plan
 - Communicate on schedule to be agreed to
 - Prepare drafts of written materials
 - Assist in proposing case schedule

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

BIDDER NAME: PMG Consulting, LLC

DATE: February 16, 2024

EVALUATOR NAME: Susan W. Chamberlin

EVALUATOR DEPARTMENT: Office of the Public Advocate

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Individual Evaluator Comments:

- I. Organization Qualifications and Experience
 - 1. Overview of Organization
 - Reasonable staffing
 - Qualified personnel
 - 2. Subcontractors
 - 3. Organizational Chart
 - 4. Etc.

- II. Proposed Services
 - 1. Services to be Provided
 - General description of services
 - Unclear what cyber hours are
 - 2. Implementation – Work Plan
 - Lacks detail
 - Not clear if there's NE experience
 - No Versant experience



STATE OF MAINE
OFFICE OF THE PUBLIC ADVOCATE

Janet T. Mills
Governor

William S. Harwood
Public Advocate

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

I, Andrew Landry, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Office of the Public Advocate. 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

2/7/24

Date



STATE OF MAINE
OFFICE OF THE PUBLIC ADVOCATE

Janet T. Mills
Governor

William S. Harwood
Public Advocate

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202401007

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

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Susan Chamberlin
Signature

2/13/24
Date



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Janet T. Mills
Governor

William S. Harwood
Public Advocate

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202401007**

RFP TITLE: Electric Rate Case Consultant for the Maine Public Advocate

I, Richard Hevey, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Office of the Public Advocate. 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.

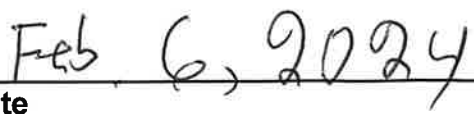
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Signature


Date