



## Telematics Managed EV Charging

### Request for Proposal

**RFP Release Date: 10/27/2023**  
**Bidder Questions Due: 11/03/2023**  
**Answers Posted: 11/08/2023**  
**Proposals Due: 11/17/2023**

### Summary

Efficiency Vermont, a statewide Energy Efficiency Utility operated by Vermont Energy Investment Corporation (VEIC), is seeking proposals from professionals or organizations for **Telematics Managed EV Charging**. Responses to this Request for Proposals (RFP) must be delivered electronically to VEIC by **5 p.m. EDT on November 17<sup>th</sup>, 2023**. Efficiency Vermont will not accept responses submitted after **5 p.m. EDT**. Please submit your response electronically via e-mail to: **abreen@veic.org** with **RFP Submittal for Telematics Managed EV Charging** in the subject line.

Efficiency Vermont will respond to individual questions regarding this RFP only as follows: VEIC will receive questions regarding requirements and scope of work up to **5 p.m. EDT November 3<sup>rd</sup>, 2023**, via e-mail only, to **abreen@veic.org** **with Telematics Managed EV Charging Question in the subject line**. When appropriate, please refer to the RFP page number and Section Heading for ease of navigation and response. Efficiency Vermont will post answers on the VEIC website **<https://www.veic.org/requests-for-proposals>** no later than **November 8<sup>th</sup>, 2023**. VEIC will not address questions submitted after **November 3<sup>rd</sup>, 2023**.

## Background

### Vermont Energy Investment Corporation

Vermont Energy Investment Corporation (VEIC) is a mission-driven, nonprofit organization dedicated to reducing the economic and environmental costs of energy use. It carries out its mission, in part, by designing and implementing innovative energy efficiency and renewable energy programs. Founded in 1986, VEIC is nationally and internationally recognized for advancing energy efficiency, energy conservation, and renewable energy programs and projects across the United States, Canada, and Europe. VEIC employs 280 professionals and is headquartered in Winooski, Vermont. It has offices also in Washington, DC, and Ohio. For additional information, please see: VEIC Website: **[www.VEIC.org](http://www.VEIC.org)**

VEIC is a **Just-labeled** organization, committing itself to corporate transparency on social justice and equity indicators. We've also adopted the **Social Vulnerability Index** across our entire organization to measure the impact our work has on underserved communities. With ongoing employee engagement in **social and energy justice principles**, justice and fairness are embedded in everything we do. We see opportunities everywhere to create new tools that can help us build the kind of company—and the kind of society—we want to see.

## Efficiency Vermont

Launched January 1, 2000, Efficiency Vermont helps ratepayers reduce energy costs, strengthen the local economy, and protect the environment by making homes and business energy efficient. Efficiency Vermont provides technical assistance, rebates, and other financial incentives to help Vermont households, businesses and other institutions—such as K-12 schools—reduce their energy costs with energy-efficient equipment, lighting, and approaches to construction and major renovation. Efficiency Vermont partners extensively with contractors, suppliers, and retailers of efficient products and services throughout the state.

VEIC operates Efficiency Vermont under an Order of Appointment issued by the Vermont Public Service Board. For additional information, please see the Efficiency Vermont website:

[www.encyvermont.com](http://www.encyvermont.com)

# Scope of Work and Schedule

## Program Background

Efficiency Vermont partners with Vermont distribution utilities (“DUs”) to implement Flexible Load Management programs (see definitions) at their request. This includes partnerships on select **managed Electric Vehicle (EV) charging programs**. Efficiency Vermont is exploring various strategies to assist with managing the additional load brought on by largescale EV adoption. A successful program will shift EV charging from periods when peak demand is high to times when utility costs are lowest and powered by the cleanest sources. The programs implemented to date have primarily focused on controlling the charging schedule through the charger hardware. While these programs have been successful within the defined program parameters, designing programs around specific charger brands has posed challenges to cost-effectively scale the program.

## Program Overview

Efficiency Vermont seeks to contract with a vendor for a new EV managed charging program using a software-based intervention that is compatible with both equipment-based control (Electric Vehicle Supply Equipment; “EVSE”) as well as vehicle-based control (“telematics”); see

definitions) to supplement existing rate-based programs. This solution is planned to be deployed in multiple DU territories under one common program, though alternative deployment options may be investigated and finalized at a later date. The vendor shall provide:

- a. A solution that is compatible with a wide variety of vehicle and EVSE manufacturers (“Original Equipment Manufacturers” or “OEMs”).
- b. DU-specific views of program data and scheduling that are isolated from the rest of the program and unable to be accessed by other DUs.
- c. Ability for DUs to require certain charging schedules for their customers—including the ability to stagger schedules for certain cohorts of their customers.

Efficiency Vermont seeks to provide DUs with a shared platform to distribute setup costs and operational fees over a larger customer base to reduce overall program cost and increase program impact.

## Definitions

**Aggregator:** The industry does not have a clear definition for the term “aggregator”. For the purposes of this RFP, we define it as a third-party software solution which aggregates small-scale, usually behind-the-meter resources onto a common platform to facilitate load management solutions (including demand response and load shedding programs). Solution may be part of a larger Distributed Energy Resource Management System (DERMS) platform, or simply aggregate multiple devices for load management at a lower hierarchical level than a typical DERMS provider.

**DU or Distribution Utility:** Individually or collectively, any of Vermont’s electric distribution utilities who partner with Efficiency Vermont to implement Flexible Load Management programs.

**Flexible Load Management:** also known as demand flexibility in other areas of the industry. Includes the use of communication and control technologies to shift electricity use across time of day while maintaining the quality and value of end-use services.

**Telematics:** software-based EV charging control that utilizes existing vehicle cloud connection. Enabled by connecting many EV manufacturers’ Application Programming Interfaces (APIs) or other database connection to a standard platform. Participating EV car data is leveraged to automate charging schedules and respond to utility demand events.

**Active Charge Management:** uses telematics link to actively start and stop the vehicle charging based on a demand response event or schedule. Limited by the cellular reception available for the vehicle.

**Passive Charge Management:** uses telematics data to verify adherence to a schedule designed to avoid peak demand periods. Leverages a lower energy rate or rebate to reward the driver, allows for wider participation from a greater number of vehicle makes and models, and does not have the same data connection limitations as active charge management.

## RFP and Implementation Schedule

Table 1. Efficiency Vermont will attempt to adhere to the following schedule but reserves the right to adjust the below schedule as needed.

RFP release	10/27/2023
Bidders Questions Due	11/03/2023
Answers posted	11/08/2023
RFP responses due	11/17/2023
Bidder selected	11/24/2023
Contract negotiations and signature	12/07/2023
Anticipated Performance Period	12/07/2023-12/31/2026

## Scope of Work

### General Statement of Work

The Contractor will perform the services described in this Scope of Work and provide all the deliverables specified below.

Efficiency Vermont seeks a qualified bidder to collaborate with Efficiency Vermont and Vermont Distribution Utilities (specific list of DUs subject to change) on a software-based managed EV charging program that is compatible with both telematics control of vehicle charging as well as equipment-based control (Electric Vehicle Supply Equipment; "EVSE") methods. Efficiency Vermont seeks qualified bidders who provide existing software solutions that meet all the following essential criteria and as many preferred criteria as possible.

### Essential Criteria

- d. A solution that is compatible with a wide variety of vehicle and EVSE manufacturers (OEMs) such as Tesla, Chevrolet, and Nissan.
- e. DU-specific views of program and customer data that are isolated from the rest of the program and unable to be accessed by other DUs.
- f. Platform offers passive charge management with the option to stagger schedules (for example active management layered over passive or cohort-based schedules) to avoid creating new peak periods.

- g. Ability for Efficiency Vermont to support schedule setting for individual DU accounts with DU authorization.
- h. Has an interface that readily allows DUs, Efficiency Vermont, installers, or customers/end users to easily program or participate in predetermined off-peak charging schedules and monitor charging behavior, as established by the DU.
- i. Sufficiently accurate information is available to DUs to provide bill credits or other compensation in a format compatible with DU billing systems.
- j. An ability for Efficiency Vermont to capture and export energy usage and charging behavior in a reportable and presentable format such as a CSV file.
- k. Continued service provided to the customer with an interface that is conducive to maintaining an off-peak schedule, based on charging parameters and customer preferences.
- l. Clear and effective communication with customers on any program changes and provide customers with the mechanism to opt-out schedules or program if they choose to do so. The vendor should allow customers to override the pre-determined off-peak charging schedule for a set period without needing to “reset” the charging schedule. The vendor shall implement a finite number of override days for each customer per incentive period.
- m. Integration with other load management platforms (“aggregators”; see definitions).
- n. A guaranteed or committed uptime greater than 95% percent for both customers and DU integrations such as billing.

#### Preferred Criterion

1. The vendor should provide customers with value beyond financial incentives, such as providing charging reminders and insights on battery health.

The bidder is expected to detail their services, and propose how they will meet the criteria for, or perform the following tasks:

#### **Task 1: Customer Engagement and Management Plan**

The DUs and Efficiency Vermont intend to leverage their own customer engagement and marketing strategies to acquire customers and are interested in learning what supplemental services are available from each bidder to support this work. Bidders must provide a bulleted overview with key points on how they plan to engage customers, customer engagement

strategy, and/or provide examples of other customer engagement plans. Customer Engagement plan that details the specific means through which the bidder can help support DUs and Efficiency Vermont in targeting, enrolling, and managing customers' charging behavior. This plan should also specify marketing strategies, and technologies that are to be leveraged in the process of customer acquisition and ongoing management. The plan should address the following points:

- o. Overview of the enrollment process and customer experience
- p. What information the user is required to enter
  - o. Is the enrollment system capable of validating customer and device eligibility for program enrollment based on one or more utility-defined criteria: valid utility account number and service address?
  - o. Is the enrollment system capable of recognizing if a customer is participating in another demand response or EVSE program based on DU supplied information?
- q. Ensuring continued service to the end customer
  - o. Please describe the app, website, or ongoing customer engagement plan, as well as a customer's ability to set preferences such as the ability to temporarily opt out of the program for a period.
- r. Achieving the Partner's goals of shifting load
  - o. Describe your approach to avoiding peak demand periods and managing demand based on grid conditions. Describe your ability to work with an aggregator and which aggregator(s) you already have relationships with as well as indicate support and availability of APIs.
  - o. Describe your ability to reduce peak demand induced by shifting charging to off peak times.
  - o. Describe the optimum number of customers needed for program success given the multiple DU structure.
  - o. Ability to provide performance-based payments to customers and mechanism(s) for funds distribution that integrate with existing utility platforms
- s. Implementing a quality assurance plan for the enrollment of customers and the security of their personal identifiable information (PII).
- t. Providing information and scheduling control to multiple DUs through a portal.

- u. **Task 1 Deliverables:** narrative describing approach for list above, including screenshots or other materials as needed.

### **Task 2: Vehicle Data Source, Stability, & Security**

Describe the arrangements made with vehicle OEMs or other providers that predicate the use of the vehicle's or EVSE's data for managed charging, including:

- v. Agreements with vehicle OEM or third-party agreements for data services and what arrangements exist between the bidder and the vehicle OEMs or 3<sup>rd</sup> party data vendor to guarantee continuous service to the customer.
  - o Which vehicle OEMs and/or models are supported. Please detail how charge management functionality varies by OEM or model.
  - o Where data is collected. For example, can the telematics provider can receive data when the customer is charging at their residence vs. at a public charging station?
  - o What other services and data can be provided through the vehicle API (by OEM or model as needed).
  - o What services can be provided to connected Level 2 EVSE customers, including which EVSE OEMs are supported, as well as any OEM specific limitations.
  - o Bidders should explain their business continuity plans for program participants, such as how the bidder would support participants' transition in the event of an early termination.
- w. **Task 2 Deliverables:** narrative describing approach for criteria above,

### **Task 3: Project Management and Reporting**

Describe the plan for implementation of the program and management approach for meeting the needs of the partners.

2. Describe the approach taken for the following:
  - a. The mechanisms by which multiple DUs can access their respective customers' data and set schedules. Describe whether each DU can log into a secure online portal and access only their customer data. Describe how many allowable and configurable user administrative roles and access levels to the platform exist.
  - b. The ability for DUs to isolate customers into cohorts within their larger pool of customers describing how the data will be isolated from other DU cohorts for

reporting by individual customers, sub-cohort (such as circuit level or town) and aggregate.

- c. Confirm how each DU can set schedules for their customers or a cohort of customers. Can this be achieved by the individual DU log in described above? Describe the functionality available to set different schedules for different cohorts of customers to avoid peak creation.
3. Please describe the platform's reporting capability including which datapoints bidder's system or platform is capable of tracking and reporting, at any time, including but not limited to:
- a. Actual operational kW shifted through daily scheduling;
  - b. Sub-Cohort members by Distribution Utility
  - c. Devices opt-in and opt-outs, online and offline device status (with duration) including customer name, customer address, customer device, device serial number, device status.
  - d. Any additional datapoints that bidder believes would be of value to the program
  - e. Describe bidder's ability to verify reporting and analytics capabilities in terms of data accuracy.
  - f. Describe the available reporting functionality, including but not limited to:
    - o the ability for reoccurring and ad hoc reports
    - o reporting that shows individual device impacts
    - o Formats available for reporting (file type or platform)

Describe your system's ability to provide the DU device-level data for billing purposes.

- g. **Task 3 Deliverables:** narrative describing approach for criteria listed above.

#### **Task 4: Service pricing and implementation costs**

- h. Describe bidder's pricing structure including setup fees, initial license and renewal license fees, ongoing maintenance and support fees, and per asset fees given the program requirement of servicing multiple DUs. Provide all costs on a line-item basis, including any optional, add-on, or supplemental costs that might be relevant to any licensing structure of the services offered.



- i. Bidders should confirm their ability to enter into an agreement with Efficiency Vermont that would also allow DUs to participate under the same agreement.
- j. Describe the minimum number of program participants needed.
- k. **Task 4 Deliverables:** narrative describing approach for criteria listed above.

### Preparing and Delivering a Proposal

For ease and efficiency of review, Efficiency Vermont has specified the requirements for submitting a proposal to this RFP. Bidders must follow, and be responsive to, ALL requirements of this RFP. Proposals should be clear and concise, presented in the form of a written response with sections and sub-headings. Proposals that are not in the required format or incomplete may be disqualified at Efficiency Vermont’s sole discretion.

Bidders are required to propose, and will be scored upon, the individual criteria summarized in Table 2. **Every bidder is required to include a Bid Summary Table based on Table 2** below with the specific value or information they propose for each of the listed criteria. The Bid Summary Table shall be presented as part of the narrative summary.

Table 2: Response Summary, Evaluation Criteria and Points

Scoring Category/Criteria	Description	Max Points
<b>Preferred criterion</b>	Meets preferred criterion	<b>5 Total</b>
<b>Task 1: Customer Engagement and Management Plan</b>		<b>25 Total</b>
Enrollment system eligibility validation	System can validate customer eligibility based on utility data	5
Opt out and customer preference	Platform provides a user-friendly process to opt out of schedule and set preferences.	5
Integration with Aggregators	Platform provides pathway to integrate with Aggregators and DERMs	5
Payment Integration	Platform can integrate with billing systems	5
Overall Task 1 Response		5
<b>Task 2: Vehicle Data Source, Stability, &amp; Security</b>		<b>25 Total</b>

Data Source Agreements	Bidder has OEM agreements, popular VT makes/models, and EVSE integration	10
Exit Strategy	Bidder provides detailed contingency plan(s) for company buyout and failure.	10
Overall Task 2 Response		5
<b>Task 3: Project Management and Reporting</b>		<b>25 Total</b>
Data and Portal Access	Bidder provides detailed description of DU portal access that meets needs.	10
Reporting Ability	Bidder describes reporting abilities that meet needs.	5
Reporting Features	Bidder describes reporting system function that meets needs.	5
Overall Task 3 Response		5
<b>Task 4: Service Pricing and Cost</b>		<b>50 Total</b>
Line-Item Costs	Bidder provides a detailed breakdown of program costs. Total costs are competitive and will maximize the efficient spend of Efficiency Vermont funding.	10
Contract Details	Bidder provides detailed explanation of their contractual needs to support multiple DUs.	10
Overall Task 4 Response		5
Overall responsiveness to RFP	Bidder follows all directions and requirements indicated in this RFP	5
Overall company profile, ownership, and qualifications	Bidder provides detailed and acceptable information in response to the sections in Response Requirements relating to its company qualifications, including ownership, past	10

	experience, financial solvency, and any pertinent litigation.	
Contracting Compliance and Readiness	Bidder demonstrates its ability and willingness to comply with Efficiency Vermont's standard contract terms, insurance requirements, and information security requirements.	10
	<b>TOTAL POINTS AVAILABLE</b>	<b>130</b>

## Response Requirements

- A. **Company Info:** Name of the business, contact person, and contact information including full legal name, address, telephone, mobile telephone number, e-mail address, and website address, as applicable.
- B. **Company profile:** a brief company profile, not exceeding 500 words, including any subcontractors.
- C. **Statement of ownership:** the type of business entity (sole proprietorship, corporation, LLC, or other).
- D. **Narrative and Bid Summary Table:** a narrative outlining their approach to the Scope of Work and include proposed values or summary information for each of the scoring criteria listed in Table 2 above. (The values that the bidders provide in the bid summary table are its proposed values, which will not be binding on Efficiency Vermont. Efficiency Vermont in its sole discretion will determine the final values to be awarded to each bidder.)
- E. **Binding Transmittal Letter** (1 page maximum): Each proposal must include a binding transmittal letter signed by a party authorized to obligate the bidder to the services described in their proposal. The letter must clearly identify the person authorized to serve as the organization's representative for future communications regarding the response. **The letter must state that the proposal is valid for 60 days.**
- F. **Budget** (5 pages maximum): Each proposal must include a detailed budget. The budget for the Scope of Work shall not exceed \$240,000 inclusive of setup fees and ongoing fees (on a time or per vehicle basis), excluding customer incentives. Bidders must include

in their proposal a description of any assumptions made regarding the Scope of Work that may have an impact on the budget. Labor rates may be attached as a separate appendix.

- G. **Qualifications and Team Experience** (5 pages maximum): This section of the response must demonstrate the bidder’s team’s (including any subcontractors) knowledge, experience and ability to successfully complete the Scope of Work.

Provide details on the roles and responsibilities of key personnel and team members including any subcontractors. Experience should include certifications and training for key staff.

- H. **Proposal Exceptions Summary Form.** A Proposal Exception Summary Form (see below) with exceptions to items in any section of this RFP or the Efficiency Vermont’s Standard Contract terms and conditions. Failure to note exceptions on the Proposal Exception Summary Form will be deemed to be acceptance of the terms of this RFP and Efficiency Vermont’s Standard Contract terms and conditions in Appendix A. Efficiency Vermont will take these exemptions into consideration when evaluating responses. If exceptions are not noted in bidder’s proposal but raised during contract negotiations, Efficiency Vermont reserves the right to cancel the negotiations and award projects to other bidders. If Bidder would like to proposal their contract template, a copy of the template should be attached as an appendix.

RFP/ Contract Reference	Bidder’s Proposal Reference	Brief Explanation of Exception
(Reference specific outline point to which exception is taken)	(Page, section, items in bidder’s proposal where exception is explained)	(Short description of requested exception)
1.		
2.		

- I. Financial Solvency:

I.

m. Must include one (1) balance sheet and profit loss summary, or financial statements, if available, for the last calendar or fiscal year. Financial documents that are not audited must be signed and dated by a company representative.

J. **Certificate of Insurance.** The bidder must supply a current Certificate of Insurance showing evidence of its current insurance coverage. If awarded a Contract, bidder will also be required to provide a final certificate of insurance to show compliance with the minimum insurance requirements outlined in the successful bidder’s contract. Efficiency Vermont anticipates the minimum requirements to be as outlined below but will confirm final insurance requirements prior to issuance of a contract. The final certificate of insurance shall comply with the requirements outlined in Efficiency Vermont’s Standard Contract (**Appendix A**). Bidder must raise any questions about the insurance requirements by the deadline set forth above and must identify any exceptions to the anticipated minimum requirements in its response.

Insurance Policies	Limits
Commercial General Liability	\$1m per occurrence/\$2m aggregate
Automotive Liability	\$1m per occurrence single limit for bodily injuries and property damage
Crime Insurance	\$1m per occurrence for dishonest acts of Subcontractor’s employees which result in a loss to the District or VEIC.
Workers’ Compensation	Statutory mandates
Employer’s Liability	\$500k per accident; \$500k per disease; \$500k policy disease limit
Professional Liability Insurance (Technology Errors & Omissions)	\$1m per occurrence/\$2m aggregate
Cyber Liability Insurance	\$1m per occurrence/\$1m aggregate
Umbrella or Excess Liability Insurance	\$3m per occurrence/\$3m aggregate (subcontracts under \$100k will only be required to have \$1m/\$1m)

n.

K. Disclosure of any pertinent litigation

- o. A bidder must disclose any past or pending judgments, lawsuits, actions, bankruptcies or regulatory decisions or information that may adversely affect the bidder's ability to meet any requirements of this RFP, the subcontract or the bidder's proposal. The bidder agrees to provide a detailed description of any of the above events and the applicable case number in its proposal.
  - p. This disclosure obligation is an on-going material obligation that applies from the date of proposal submission through the expiration of any resulting subcontract award. Failure to disclose pertinent litigation may result in the disqualification of Bidder's proposal.
- L. **Information Security Requirements: Please** review the Information Security Requirements listed in Appendix B and provide a complete Information Security Questionnaire (available for download with this RFP) with your response. The DCSEU will not consider any exceptions or request to negotiate terms that were not called out as exceptions to the security requirements in the RFP response.
- q. The above information security requirements must be included if the RFP involves purchasing software, developing software or providing external parties with access to VEIC's systems. Please see consult Christian Campbell and request a copy of VEIC's Information Security Requirements to attach to the RFP as Appendix B. If the RFP does not include these services, it's possible an information security requirement may still be required. Legal will provide feedback if this is an issue.

## Confidentiality

Efficiency Vermont will not share any Bidder-specific information publicly or with any other Bidders, with the exception of announcing the successful Bidder(s), if applicable, once a final selection has been made. If any Bidder wishes to execute a mutual confidentiality agreement before providing any documentation as part of its response, requests should be sent to [abreen@veic.org](mailto:abreen@veic.org) and a mutual confidentiality agreement will be provided.

## Limitation

This RFP does not commit Efficiency Vermont to award a contract or to pay any costs incurred in the preparation or submission of proposals. Efficiency Vermont reserves the right to reject any or all proposals received in response to this RFP, to negotiate with any qualified bidder or to cancel in part or in its entirety the RFP, if any of these actions is deemed by Efficiency Vermont

in its sole discretion to be in Efficiency Vermont's best interest. In the event Efficiency Vermont cancels this RFP in part or in its entirety, proposal submissions may be shared with DUs who may choose to carry out some or all of the program offerings described in this RFP.