



# Request for Qualifications

Residential Electric Vehicle Charging  
Program Vendor

Southern Maryland Electric  
Cooperative (SMECO)

February 2023

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## 1.0 Information & Instructions

Based on statements of qualifications received in response to this request for qualifications (RFQ), Southern Maryland Electric Cooperative (SMECO) will select a vendor to support the 2023-2025 Residential Electric Vehicle (EV) Charging Program.

SMECO has selected ICF Resources, LLC, a subsidiary of ICF, to assist in managing this RFQ.

### Designated Contact Person

ICF's designated point of contact managing this RFQ is:

Stephen Willingmyre  
Senior Program Manager  
[stephen.willingmyre@icf.com](mailto:stephen.willingmyre@icf.com)

### Schedule

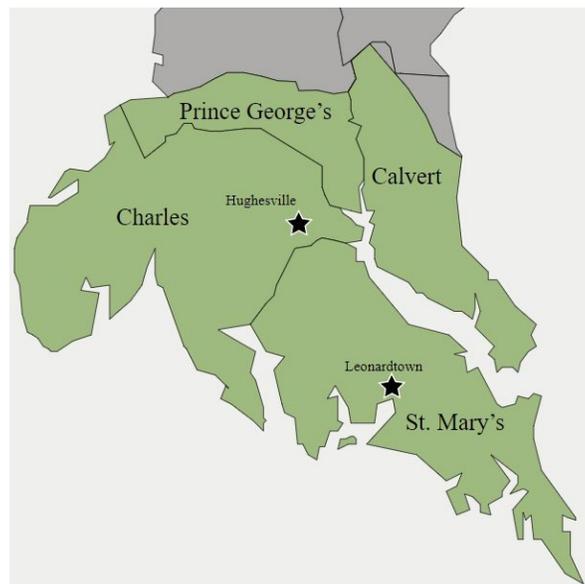
SMECO's anticipated schedule, which is subject to change, is provided below.

RFQ Release Date	February 27, 2023
Vendor Questions Due	March 6, 2023, by 5:00 PM Eastern
Vendor Responses Due	March 13, 2023, by 5:00 PM Eastern
Notification of Selection, Begin Contractual Discussions	March 24, 2023
Program Launch	May 1, 2023

## 2.0 Introduction & Background

SMECO is a customer-owned electric cooperative providing electricity to more than 170,000 member accounts in southern Prince George's County, and in Charles County, St. Mary's County, and all but in the northeast portion of Calvert County. The map below illustrates SMECO's service territory.

### SMECO Service Territory



SMECO is supporting EV adoption throughout Southern Maryland in multiple ways, including building out a network of [EV Recharge](#) stations available to the public. In February 2023, the Maryland Public Service Commission approved SMECO's application in Case No. 9478 to expand transportation electrification support into the residential sector.

SMECO seeks an experienced and qualified company to support the implementation of *both* a residential EV charging data collection rebate and a residential managed charging program. SMECO anticipates these offerings will be available to customers beginning late Q1/early Q2 of 2023. The program duration, as approved, is three (3) years.

The residential EV charging data collection rebate program will provide an annual incentive to up to 500 qualified residential customers to share EV charging data with SMECO, either through the smart Level 2 home charger or the EV itself (via telematics).

The residential managed charging program will provide a monthly incentive to residential customers who select and manage charging preferences that align with off-peak periods. Customers may enroll either their EV (via telematics) or their smart Level 2 home charger, but not both. SMECO estimates that total enrollment in the managed charging program will be 1,000 customers, which may include residential rebate recipients and existing EV drivers.

### 3.0 Qualifications & Experience

To better understand the qualifications, experience, and capabilities of vendors, SMECO seeks the following information:

1. Describe relevant current or past experience of the company (within the last five (5) years), including the following:
  - a. Similar projects – Summarize similar residential EV charging programs the company has supported including dates associated with the period of performance, number of participants (both targets and actuals), incentive levels, and any other key facts.
  - b. Project references – For at least three (3) of the similar projects the company has completed or is currently supporting, provide individual references including contact information (name, title, email, and phone number).
2. Provide lists of the vendor's partners, categorized as follows. For this purpose of this RFQ, "integration" means the vendor and the third-party provider have entered into an agreement that allows the vendor to: a) receive data (e.g., interval) from the provider to calculate the residential rebate, *and* b) to communicate with end use devices in order to enable the managed charging program.
  - a. The EV charging provider networks the vendor is currently integrated with (as of February 2023).
  - b. The EV original equipment manufacturers (OEMs) the vendor is currently integrated with (as of February 2023).
  - c. The EV charging networks and OEMs the vendor is in discussions with and has a high degree of certainty will be fully integrated with the vendor by the end of Q1 2025.
3. SMECO intends to provide customers with the option to enroll in an EV-only time-of-use (TOU) rate in the future. Though that timeline has yet to be determined, SMECO would like to understand whether the selected vendor may be able to support implementation of the new rate. If applicable, describe the company's current AMI data disaggregation capabilities specific

to EV charging. Also, if applicable, explain how the vendor would integrate with a third party implementing the EV-only TOU rate to allow customers to potentially enroll in both the managed charging program and an EV-only TOU rate.

## 4.0 Submission Requirements

Statements of qualifications that do not conform to the requirements specified in this RFQ will not be accepted for consideration.

### 4.1 Submittal Instructions

The complete statement of qualifications must be submitted by the due date specified on the online portal using the online submittal process.

### 4.2 Format

RFQ responses shall not be longer than 10 pages, inclusive of exhibits but exclusive of a cover or title page. To expedite and simplify the evaluation and to assure that each statement of qualifications receives the same orderly review, it is recommended that submissions use the following outline:

#### Statement of Qualifications

1. **Introduction / Executive Summary** – Summarize the company’s understanding of this RFQ and the program SMECO will offer. Describe how the company is uniquely qualified to support SMECO’s objectives and serve SMECO’s members.
2. **Company / Team Profile** – Describe the company and, if applicable, the team responsible for work related to this RFP. Identify a lead contact who, should the company be selected, would be responsible for ensuring that all activities, analyses, and work products are timely and of acceptable quality.
3. **Qualifications and Experience** – Provide comprehensive yet concise responses to the information request in Section 3.0 of this RFQ.

## 5.0 Evaluation

Submissions that are received by the submission deadline and that meet the requirements established in the RFQ will be reviewed and evaluated by a review team. ICF reserves the right to decide whether a proposal is or is not acceptable in terms of meeting the requirements of this RFQ and to accept or reject any or all submissions received.

In evaluating submissions, SMECO and ICF reserve the right to take any of the following steps, with respect either to all of the submissions received or to a subset of submissions selected as superior to the others: (1) consult with prior clients on the performance of the vendor; (2) schedule presentations or interviews with representatives of the respondent(s); (3) conduct a review of past performance, including a review of reports, analyses, or other materials that would reflect the respondent's performance; and (4) request additional data or supporting material.

### 5.1 Evaluation Criteria

SMECO will review and evaluate submissions on the basis of the following criteria:

- **Quality and clarity of response** – Vendor must respond clearly and comprehensively to all questions outlined in Section 3.0 of this RFQ.

- **Experience and qualifications** – Vendor must have a proven track record of high performance in residential EV charging incentive programs similar to the program SMECO plans to implement.
- **Capabilities** – Vendor must be integrated with multiple EV charging network providers and EV OEMs.
- **Familiarity with SMECO’s territory and members** – Vendor must demonstrate an understanding of SMECO’s unique territory.

## 5.2 Contract Award

SMECO or ICF will notify all respondents of the selection decision by email. The anticipated notification date is specified on the online portal.

SMECO reserves the right to negotiate the final terms and conditions of the contract award with the selected vendor.

## 6.0 Deadlines & Submittal Instructions

Questions may be submitted on the procurement portal by **11:59 PM (Eastern) on Monday, March 6, 2023**. SMECO, and ICF on its behalf, cannot guarantee a response to questions received after that date and time. Any questions submitted will be sent to everyone who is registered as a respondent on the procurement portal.

Submittals must be delivered by **11:59 PM (Eastern) on Monday, March 13, 2023**. Please submit your completed response via the online procurement portal only by the deadline at this URL:

<https://eeprocmntportal.icfwebservices.com/>. The document must be saved and uploaded in the following format: CompanyName SMECO 2023 Resi EV

## 7.0 Miscellaneous

- This is an invitation for statements of qualifications and not a tender call.
- The successful vendor shall be invited to enter into a professional services agreement setting forth terms and conditions acceptable to SMECO or a designated subcontractor.
- ICF, at its sole discretion, may reject any or all submissions in response to this RFP. Further, ICF may cancel this RFQ at any time and may modify the RFQ including without limitation.
- SMECO may select any response, at its sole discretion, to be in its best interests or the most satisfactory.
- ICF shall be entitled at its sole discretion to waive any irregularity, informality, or any non-conformance with the requirements of this RFQ whatsoever with respect to any submission received by ICF, or to reject any submission for any such irregularity, informality, or non-conformance.
- SMECO may enter into post-submission negotiations and discussions with any one or more respondent(s) regarding price, project scope, and/or any other term of a respondent’s submission, and such other terms as SMECO may require, at any time prior to any execution of an agreement. SMECO may, at its sole election, enter into simultaneous, competitive negotiations with multiple respondents or negotiate with individual respondents. Negotiations with respondents may result in the enlargement or reduction of the project scope, or changes in other terms that are material to the RFQ and the submitted proposals. In such event, SMECO shall have no obligation to inform other respondents of the changes, or to permit them to revise their proposals in light thereof, although SMECO, at its sole discretion, may do so if SMECO determines such is in SMECO’s best interest.

- SMECO may discontinue any negotiations at any time, enter into or continue negotiations with firms that did not respond to this RFQ and/or solicit new responses from firms that did not respond to this RFQ, including but not limited to negotiations or proposals for components of the scope, if any, that are not included in any successful proposal or any executed contract.
- Respondents shall be solely and fully responsible for all costs associated with the development, preparation, transmittal, and submission of any statement of qualifications or material submitted in response to this RFQ. SMECO may, in its sole discretion, ask respondents to present their proposal in person to SMECO representatives at SMECO's offices, and the costs of such presentations shall be solely the responsibility of the respondent. By submitting a response, a respondent agrees that there may be no claims whatsoever for reimbursement from SMECO for any such costs. All costs incurred by the respondent during the selection process and during any negotiations will be solely the responsibility of the respondent.
- SMECO nor ICF assumes no contractual or other obligations as a result of the issuance of this RFQ, the preparation or submission of a statement of qualifications by a respondent, the evaluation of submissions, the respondent's conduct of presentations or the selection of any respondent for further negotiations, or on any other basis whatsoever.
- No respondent shall have any claim for any compensation of any kind whatsoever, as a result of participating in this RFQ process, and by submitting a proposal each respondent shall be deemed to have agreed that it has no claim.
- If SMECO chooses to enter into negotiations with a respondent, the respondent may be asked to provide, at its own expense, a bond guaranteeing that it is prepared to enter into a contractual agreement with SMECO.
- **Confidentiality** - SMECO may supply the selected vendor with confidential customer information. All such information is the exclusive property of SMECO. The vendor shall not sell, barter or exchange any information provided for this program, including but not limited to the customer information, in perpetuity. The vendor shall not copy customer information without prior written consent provided by SMECO, as appropriate. The vendor and its employees shall not use the customer information or the delivery of the program for the generation of leads for sales of any other services or products the vendor may offer in perpetuity. Respondents' responses and pricing for this solicitation will be treated as confidential.
- **Regulatory Scrutiny of Work** - The respondent should understand that their documents and work will become part of a public process involving incentive regulation and cost recovery, and be reviewed and scrutinized by SMECO, by independent consultants, intervener groups and regulatory staff. All data developed by the selected vendor under these contracts are the property of SMECO, and electronic files containing all data shall be submitted to SMECO as described herein.
- **Termination Right of ICF** - ICF may terminate this Agreement at any time upon five (5) days written notice to the selected vendor for any reason. ICF shall NOT be responsible for reimbursing the vendor for any cost incurred in reliance on the expectation that the Agreement would remain in effect throughout the end of the term.
- **Termination Right of Contractor** - The selected vendor may terminate this Agreement upon thirty (30) days advance written notice to ICF if it has materially breached this Agreement.
- **M/W Diverse Business Enterprises (DBE)** - SMECO encourages minority, service-disabled veterans, and women-owned businesses to participate in this opportunity. Please provide documentation of such status in order to be considered as a DBE.

## Attachment A: Company Information

### A.1 Company Details

**Company Name:** Click here to enter text.

**Street Address:** Click here to enter text.

**Suite #:** Click here to enter text.

**City:** Click here to enter text.

**State:** Click here to enter text.

**Zip Code:** Click here to enter text.

**Primary Point of Contact Name:** Click here to enter text.

**Phone:** Click here to enter text.

**Email:** Click here to enter text.

**Website:** Click here to enter text.

### A.2 Minimum Requirements

The following insurance minimum requirements must be met in order to qualify for consideration.

Please indicate your coverage or acceptance as requested:

- **Employers Liability insurance** with a minimum occurrence limit of bodily injury by accident \$1,000,000 each accident, bodily injury by disease \$1,000,000 policy limit and, bodily injury by disease \$1,000,000 each employee. ***Applicant Has Required Coverage***
- **Commercial General Liability Insurance:** \$1,000,000 each occurrence; \$2,000,000 general aggregate (including bodily injury, property damage, personal injury, advertising injury, products and completed operations, and contractual liability) ***Applicant Has Required Coverage***
- **Professional Liability, Errors and Omissions Insurance** (\$1,000,000 per occurrence) ***Applicant Has Required Coverage***
- **Cyber/Network Security Liability Insurance (including coverage for Professional and Technology-Based Services Liability if not covered under Subcontractor's Professional Liability/Errors and Omissions Insurance referenced above)** in the amount of \$10,000,000 per accident/occurrence/annual aggregate, covering the Subcontractor, its employees, agents, contractors, and subcontractors in the performance of all services. ***Applicant Has Required Coverage***

All insurance coverage obtained and maintained by the selected vendor and the Certificate of Insurance shall include the following statement (when requested by SMECO):

*"SMECO is included as Additional Insured as respect to the General Liability policy. Waiver of Subrogation is included to the extent permitted by law. All policies are primary and, with the exception of Professional Liability, non-contributory with any and all applicable coverage, contain cross-liability coverage, and severability of interests language."*

### A.3 Additional Information

Please provide any additional information the company wishes to include.

[Click here to enter text.](#)

Company Representative Name: [Click here to enter text.](#)    Title: [Click here to enter text.](#)

Signed: [Click here to enter text.](#)