

Request for Proposals
NASEO Accelerating Energy Storage Research, Development, and
Demonstration Guide: Policy, Programmatic, and Planning
Considerations for States

Solicitation Number: NASEO-2023-RFP-001

Released: August 7, 2023
Responses Due: August 21, 2023

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

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

I. Introduction and Background

As the United States moves towards a more electrified and carbon-free future, energy storage will be key to providing reliability and grid flexibility. A range of energy storage technologies (including battery storage, flywheels, and pumped hydropower) are being explored for different use cases and geographic locations with an overarching goal of supporting state and federal decarbonization and resilience efforts. Efforts are also underway to determine the potential for long-duration energy storage including iron-air batteries and clean hydrogen. State Energy Offices play an important role in advancing the research, development, and demonstration (RD&D) of these energy storage technologies through grant and incentive programs, cost-benefit analysis and market assessment studies, state energy storage roadmaps, engagement with investor-and-consumer owned utilities, and collaboration with the U.S. Department of Energy (DOE) and private sector.

With funding support from DOE's Office of Electricity (OE), the National Association of State Energy Officials (NASEO) will develop one (1) guide for State Energy Offices focused on energy storage RD&D and key policy, planning, and programmatic consideration to increase investment and drive market acceleration.

NASEO seeks a *Consultant* to support this project by working with NASEO to develop a guidance document for use by State Energy Offices. The *Consultant* will be expected to have knowledge of the programmatic, policy, and technical aspects of energy storage technologies and state-level goals and activity. The *Consultant* should also be prepared to discuss cost, resilience, and equity considerations. Finally, the *Consultant* should have a deep understanding of State Energy Offices' roles, distinct from state regulatory roles, in energy storage planning and policy across the country.

II. Objectives

The overall objective of the *Consultant* is to work with NASEO to research, draft, revise, and finalize one (1) guide for State Energy Offices on energy storage RD&D.

III. Approach

The *Consultant* will work with NASEO staff to develop one (1) guide focused on energy storage RD&D and policy, programmatic, and planning considerations for State Energy Offices. The guide should include successful state case studies and additional material that is outlined in more detail below. The guide should be written for non-technical audiences within State Energy Offices (primary audience). Other state entities, such as Public Utility Commissions, governors' offices, and legislators, will serve as secondary audiences. Content should clearly outline specific actions and best practices for State Energy Offices and include any relevant graphics, tables, or maps.

IV. Statement of Work, Timeline, and Expected Deliverables

It is envisioned that this project will be initiated on September 1, 2023, and concluded on January 31, 2024. NASEO will host a kick-off meeting with the *Consultant* to discuss the approach for the guide. The *Consultant* will be responsible for the following deliverable:

Energy Storage Research, Development, and Deployment (RD&D) Guide

The *Consultant* will work with NASEO to develop a guide that examines State Energy Offices’ roles in increasing energy storage RD&D with an overview of barriers and opportunities; effective engagement strategies with the private sector, utilities, community groups, and other state agencies; and successful state models for potential replication. The guide should provide information on some of the technical considerations involved with the RD&D process and the state of play and potential use-cases for different energy storage technologies including batteries, flywheels, pumped hydropower, and hydrogen. The guide should look at issues associated with cost, interconnection, market reform, and permitting – along with the role of energy storage in larger grid modernization efforts – on the federal, regional, and state level. The guide should also explore long duration energy storage and innovative opportunities for energy storage such as pairing it with a clean energy microgrid. In addition, the guide should provide actionable state energy policy, planning, and programmatic guidance along with a clear overview of the role of State Energy Offices, with case studies of successful projects provided as examples. Information on utility engagement and private sector partnerships should also be explored, along with the implications of new federal funding streams (including the Infrastructure Investment and Jobs Act and the Inflation Reduction Act). Finally, the guide should consider energy justice and equity issues – including the role of energy storage in supporting a just energy transition and opportunities for energy storage to support rural and remote areas and provide case studies of projects developed with an equity focus.

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

Project Schedule (Estimated)

Task	Estimated Deliverable Date*
Kickoff Meeting with NASEO Staff (and possibly relevant State Energy Offices)	September 2023
Energy Storage RD&D Guide	
Outline	October 16, 2023
Review Draft	November 22, 2023
Final Draft	January 15, 2023

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

The *Consultant* will develop a draft of the guide to be reviewed and commented on by NASEO, DOE, and NASEO members. Based on the comments, the *Consultant* will update the draft and prepare a final version for NASEO. Upon approval, the *Consultant* will finalize the guide for subsequent publication and distribution by NASEO. The *Consultant* does not have the right to reproduce, utilize portions of, or publish the material from the guide without NASEO’s express written permission. The guide should be delivered to NASEO in Microsoft Word format along with all relevant graphics files.

V. Period of Performance

This project is estimated to last from September 1, 2023, to January 31, 2024.

VI. Project Budget

The proposed project budget should reflect a times and materials consulting agreement. This is a competitively bid project; costs should be feasible and prudent. The *Consultant* must submit cost proposals by task for the entire Statement of Work using the DOE EERE budget justification spreadsheet

which is a separate file available for download [from DOE's website](#). NASEO may request changes to the proposal if the proposed scope exceeds the available budget.

Compensation

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

Rejection of Proposals and Incurred Costs

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

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

VII. Contract Requirements

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

VIII. Responding to the RFP

Please submit responses to the RFP to Kelsey Jones by e-mail at kjones@naseo.org. **RFP responses are due no later than August 21, 2023.** Any questions on the RFP should be directed to Kelsey Jones at kjones@naseo.org no later than August 18, 2023. All questions received and answers will be posted to the NASEO RFP website.

Responses shall include and fully address the following:

- Cover letter (should include the following):
 - Unique Entity Identification Number
 - SAM.gov registration expiration date
 - Assurance that applicant is not a debarred or suspended entity
- Resumes (please identify any foreign nationals included in the proposal)
- Description of relevant experience including prior work on energy storage policy and planning as well as working with relevant state agencies (in particular with State Energy Offices)
- Proposed approach and treatment of the tasks with a view toward expected deliverables
- Proposed Budget by Task Deliverables

The budget should be completed using the [DOE EERE budget justification spreadsheet](#). Please note that there is no cost-share requirement, applicants can use either the 3-year or 5-year budget justification and add all costs for their proposal under Budget Period 1.

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

Note: Late proposals will not be accepted.

IX. Consultant Selection and Required Qualifications

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

- Experience working with State Energy Offices or other relevant state agencies.
- Relevant experience working on energy storage policy, programmatic, and planning activities and knowledge of different technologies
- Competitive budget proposal.
- Quality of academic and professional experience in relevant field.
- Flexibility of availability.

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

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

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

Proposed Approach for Implementation (40% of total score)

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

Budget (25% of total score)

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

Administrative (5% of total score)

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