

**REQUEST FOR QUALIFICATIONS AND PROPOSALS (RFQ/P)**  
**No. CC-25-01**

**DISTRIBUTED ENERGY RESOURCE ADVISOR**

**ISSUED JUNE 16, 2025**

**Purpose**

Pursuant to Motion M-25-344, the New Orleans City Council (“Council”) is seeking to retain a professional(s) to serve as an advisor to assist the Council in the performance of its regulatory responsibility under the Home Rule Charter. Specifically, the Council is seeking an advisor with expertise in distributed energy resources (DER) to assist the Council in the potential development of programs to expand the use and availability of DER facilities, including but not limited to virtual power plants, microgrids, and battery storage.

**Scope of Service**

Any person or firm selected pursuant to this solicitation shall be responsible for developing a comprehensive, vendor-neutral program for the integration and expansion of DER facilities, collaborating with stakeholders, advising the Council on any opportunities to improve the program, and coordinating with the utility to implement Council directives.

**Qualifications Statement Content**

All responses should include:

- I. Professional experience and resumes of partners, principals and employees in the firm and subcontractors who will be responsible for, and actively involved in, the provision of professional services for the Council (Key Personnel), including the appropriate evidence of accreditation, certification and licensing in their profession.
- II. Whether the respondent has met the DBE requirement for city contracts as described in section 70-461 of the Code of Ordinances. If the requirement is not achieved, the statement should include the good faith efforts made to meet the requirement, including any solicitations to DBE-qualified vendors and/or efforts to identify DBE-qualified vendors.
- III. A description of three or more assignments which best illustrate the respondent’s current qualifications relevant to the areas requested in this RFQ/P. The assignments referenced should include examples of program development and analysis, DER facilities involved, and stakeholder engagement strategies.
- IV. Demonstrated ability to provide coverage for City Council matters when the principal consultant is unavailable.

- V. A sworn affidavit listing all persons with an ownership interest in the respondent firm or company. An “ownership interest” shall not be deemed to include ownership of stock in a publicly traded corporation or ownership of an interest in a mutual fund or trust that hold an interest in a publicly traded corporation. The affidavit is a public record.
- VI. A sworn affidavit that no other person holds an ownership interest in the respondent via a counter letter.
- VII. A list of professional labor fees for all personnel included in the respondent’s response to this RFQ/P and any others who may be called upon to perform work related to this RFQ/P.

### **Potential Conflict of Interest**

Any respondent to this RFQ shall disclose the following:

- I. Work performed for an investor-owned utility operating within the boundaries of MISO in the past five years.
- II. Any work performed on utility matters for any industrial, commercial or residential ratepayer (or groups and associations thereof) in Orleans Parish or in the service area of any of Entergy’s operating subsidiaries, currently and in the past five years.
- III. Any work performed for any other regulator of Entergy Corporation and/or any Entergy affiliate or operating company.
- IV. Any work performed on utility matters for any individual or group participating in Council Utility Docket UD-24-02.
- V. Any prior or existing services not listed above being provided to any utility-related government entities, including but not limited to public service commissions, RTOs, regional power pools, etc., operating within the boundaries of MISO, the Southwest Power Pool (SPP), or PJM Interconnection LLC (PJM) within the last five years.
- VI. Any work performed (whether compensated or not) on behalf of any Councilmember, the City Council or the City of New Orleans within the past five years.
- VII. Any work performed for independent power producers, or power marketers who have sold or offered to sell power, or power material suppliers, to any Entergy affiliate or operating company within the past five years.

For any such work performed, the respondent shall indicate the scope of the engagement, the time frame, the amount of compensation received and why the respondent deems such work to be or not be in conflict with the interests of advising or representing the Council or its committees in utility regulatory matters. The Council shall make the final decision as to whether any conflict exists.

Any individual or firm selected to serve as a DER advisor to the Council will be prohibited from serving as the administrator for any program on which the selected entity advises or assists in developing.

### **Evaluation Criteria**

Upon receipt by the due date of responses to this RFQ/P by qualified contractors and firms, the Council's staff Selection Review Committee will evaluate all responses received based upon the criteria listed herein and in Council Rule 45, a copy of which is attached. Particular emphasis will be placed on the following criteria:

- I. Experience of the Key Personnel and other professional personnel in the utility regulatory field and demonstrated ability to provide cost effective services to the Council.
- II. Quality of work samples presented.
- III. Clear understanding by the applicant of work to be performed.
- IV. Capability and experience in providing consistent, timely services, as determined by information requested from references or the Council's actual experiences.
- V. Cost based on hourly rates of consultants at various levels of expertise and experience.
- VI. Whether respondent has met, or demonstrated good-faith efforts to meet, the 35-percent DBE utilization goal applicable to City Council professional service contracts, as more fully set forth in Section 70-467 of the New Orleans City Code.
- VII. Willingness to accept a "not to exceed cost" for annual charges and to abide by the terms of the billing guidelines and protocols attached hereto.
- VIII. Willingness to work with other consultants/advisors for the Council.

### **RFQ/P Process**

Except as provided herein below, no written, electronic, or oral communications from any actual or potential respondent to this RFQ/P or anyone acting as agent or representative for such person

shall be made to any Councilmember, city employee, or Council staff person from the time this RFQ/P is posted until a final decision is made by the Council (“Blackout Period”) except as provided herein. All communications during the Blackout Period to and from any actual or potential respondent must be submitted by email to Erin Spears, Council Utilities Regulatory Office Chief of Staff & Counsel, at [espears@nola.gov](mailto:espears@nola.gov). Any such communication and the response shall be available to the public.

An electronic version of the proposal should also be submitted to Erin Spears at [espears@nola.gov](mailto:espears@nola.gov) no later than 3:00 p.m. Friday, July 18.

The Inspector General shall be notified in writing prior to any meeting of a selection or negotiation committee relating to the procurement of goods or services by the city, including meetings involving third party transactions. The notice required shall be given to the Inspector General as soon as possible after a meeting has been scheduled, but in no event later than twenty-four hours prior to the scheduled meeting. The Inspector General may attend all city meetings relating to the procurement of goods or services as provided herein and may pose questions and raise concerns consistent with the functions, authority, and powers of the Inspector General. An audio recorder or court stenographer may be utilized to record all selection or negotiation committee meetings attended by the Office of the Inspector General.

All contracts are for a twelve-month period. However, the Council may renew the contract for additional twelve-month periods up to five years, assuming continuing need for the service and mutual satisfaction. Each respondent is to include in its submittal a clear and concise statement of those personnel and firm resources for which it is willing and can commit to make available for the Council’s regulatory activities during such period.

### **Additional Information**

The City of New Orleans is not liable for any costs incurred prior to the execution of a formal written agreement. Any costs incurred in the preparation of the response, interview, or other pre-contract activity are the responsibility of the entity submitting the response.

All submissions become the property of the City and as such are public information.

## **Billing Guidelines for Consultants and Advisors**

### **PURPOSE**

The purposes of the Billing Guidelines for Consultants and Advisors (“Billing Guidelines”), are (1) to ensure the services rendered are in compliance with the contractual terms of the services agreed upon by the Council and its consultants and advisors (“Advisors”); (2) to facilitate advanced budgeting for necessary services in effort to mitigate costs; and (3) to facilitate the administration of contracts, payment of invoices, and to protect the disclosure of privileged information and/or strategies.

### **DEFINITIONS**

*Council.* “Council” refers to the New Orleans City Council, individual Councilmembers, and CURO acting on their behalf.

*Permitted Work.* Work performed in compliance with the Billing Guidelines, which includes the following:

- (1) Reasonable monitoring and information gathering with respect to issues related to the Council’s regulatory authority under Section 3-130 of the Home Rule Charter that are of interest to the Council ;
- (2) Strategic analysis, reports, and discussions;
- (3) Contacts with persons interested in issues that are related to the Council’s regulatory authority under Section 3-130 of the Home Rule Charter;
- (4) Consultation, coordination, and advocacy with others to ensure that the interests of the Council are served; and in connection therewith, personal appearances and the preparation and filing of documents;
- (5) (5) Intervention and participation in Administrative or Judicial proceedings; and in connection therewith, personal appearances and the preparation and filing of documents, pleadings, etc.;
- (6) Lobbying or monitoring activities with respect to legislation of material interest to the Council in performance of its regulatory authority under Section 3-130 of the Home Rule Charter; and in connection therewith, personal appearances and the preparation and filing of documents;
- (7) Preparation of draft legislation, resolutions, recommendations, and decisions;
- (8) Attending meetings and coordinating activities with other city agencies and other bodies;
- (9) Telephone conferences and attending meetings with, and preparing materials for, the Council.

*Non-Billable Work.* Work performed that cannot be billed or invoiced, which includes the following: (1) Research or review of industry literature or trade publications; (2) Attendance at professional conferences, educational seminars, or continuing legal education activities; (3) Research and review of basic substantive law at issue in the matter for which the firm was retained; (4) Administrative tasks, secretarial duties, or clerical services; (5) Invoicing tasks; (6) Staffing, educational, or new employee training; and (7) Travel time.

*Sensitive/Protected Work.* Work involving strategy pertaining to a current or potential administrative court proceeding, where the specific nature of the discussions, analysis, or meeting, as well as other persons involved, could jeopardize or injure the interest of the Council.

*Block Billing.* The non-permitted combination of a number of activities or tasks under a single time entry with little or no description of individual tasks performed or time accounted for.

## **PROCESS FOR INVOICE PAYMENT**

- 1) Advisors, Consultants, or Council Appointed Officer(s) (“Payee”) must submit all invoices to the CURO on a monthly basis by the last day of the following month in which the services were charged. For example, if the work was performed or billed in January, the invoices are due by the last day of February.
- 2) Once submitted, CURO will review the invoice(s) to ensure compliance with the Billing Guidelines as outlined below, and within 30 days, submit the invoice(s) to the Chair with recommendations for payment.
- 3) If CURO has questions or plans to recommend rejecting an invoiced item, CURO will contact the Advisor prior to submitting the invoice to the Chair. The Advisor may elect to submit a revised invoice. If CURO has questions or concerns regarding an invoice, the review period described above will toll from the time CURO contacts the Advisor until CURO’s receives a response sufficient for CURO to make a recommendation to the Chair.
- 4) Upon receipt, the Chair will review the invoice and recommendations from CURO and issue a memorandum either (a) authorizing original payment authorization; or (b) authorizing a revised invoice payment;
- 5) Once CURO receives authorization from the Chair, CURO will submit payment to ENO for payment within 3 calendar days.

## **BILLING REQUIREMENTS**

### Advanced Budgeting:

In order to provide the Council with an understanding of anticipated budget encumbrances, within 30 days from the date the motion authorizing a contract with an Advisor, the Advisor shall submit a budget plan identifying known prospective work, team members assigned to each project, and a potential range of the percentage of the approved budget associated therewith, with a copy to CURO (“Advanced Budget”). Known prospective work includes work associated with docketed and undocketed projects such as routine regulatory matters, committee meetings, active utility dockets, litigation, MISO and the ERSC.

With new projects anticipated or approved by the Council, Advisors should submit to the Chair and CURO a proposed scope of work along with estimated charges/expenses along with the team members needed to complete the work.

**Billing Code Descriptions:**

In order to ensure that the Council can effectively track all permitted work being performed, the Advisors shall use the billing formats and codes for regulatory matters and tasks performed. Each Advisor should provide a description of each task performed. At the beginning of the description, the Advisor should include the docket number(s) or other appropriate identifier associated with the work performed.

*Recording Work Time.* All services rendered shall be entered using the billing code description in increments of 1/10<sup>th</sup> of an hour (e.g., “7” or “1.6”) and include a brief description of the work performed. No block billing permitted.

*Privileged/Sensitive Work.* If a Payee determines that specific work performed is subject to privileged/sensitive protection or could potentially jeopardize or injure the interest of the Council, the Payee should immediately notify CURO.

**REIMBURSABLE EXPENSES**

Eligible reimbursements are reasonable expenses that have been documented, itemized, and incurred in conjunction with services described in billing code descriptions, at the lowest possible charge reasonably available, which include but not limited to, the following:

- (1) Court reporters and transcripts billed at actual cost;
- (2) Photocopying Services less than \$.10 per page;
- (3) Pre-approved third-party services;
- (4) Pre-approved necessary and ordinary travel expenses not exceeding in costs permitted pursuant to the City of New Orleans’ most current employee travel policies and guidelines;

All requests for reimbursements shall include the travel dates, destination of travel, name of the traveler, and receipts, including receipt details where applicable. In the event the production of a receipt is not feasible, approved alternative records supporting the expenses may be accepted.

**NON-REIMBURSABLE EXPENSES**

A non-reimbursable expense is a charge that is considered either a routine administrative task, a standard office overhead expense, or an unreasonable, excessive, undocumented, and/or vague charge, which includes, but not limited to, the following:

- (1) Research Services,
- (2) Express mail or courier charges unless necessary with reasonable explanation,
- (3) Customary office overhead expenses. For example, office supplies, routine postage, facsimile charges, printing, scanning, timekeeper charges, long-distance or other telephone charges for phone calls,
- (4) Photocopying charges exceeding \$.10 per page,
- (5) Undocumented beverage and food charges, and
- (6) Alcoholic beverages.