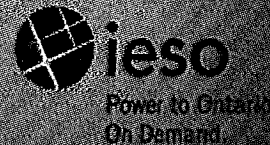


# Request for Quotation (RFQ)



November 8, 2010

**To: Potential Respondents**

You are invited to submit a quotation / proposal to the Independent Electricity System Operator (IESO) to provide report writing services in support of the Ontario Smart Grid Forum. Quotation responses will be in accordance with this RFQ Document and related attachments. Quotation submissions in response to this RFQ are required by 11:00 a.m. on Wednesday November 17, 2010. Please refer to the Submission of Quotations section on page 3 for more details on quotation submission.

In the opinion of the IESO, this RFQ is complete and without need of explanation. However, if you have questions, or should you need any clarifying information, the authorized IESO representative and contact person for this RFQ is:

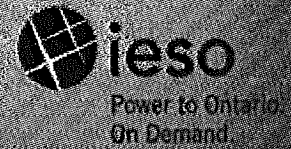
**Mr. Robert Rankin**  
**Procurement Specialist**  
**Independent Electricity System Operator**  
**Telephone: (905) 855-6265**  
**Facsimile: (905) 855-6283**  
**E-mail: [rob.rankin@ieso.ca](mailto:rob.rankin@ieso.ca) and [rfp.info@ieso.ca](mailto:rfp.info@ieso.ca)**

Please note that no verbal information given will be binding upon the IESO unless such information is subsequently issued in writing as an official addendum to this RFQ.

Sincerely

**Robert Rankin**  
**Procurement Specialist**  
**IESO**

# Request for Quotation (RFQ)



## Introduction

### About the IESO

The Independent Electricity System Operator (the “IESO”) oversees the safe, sustainable and reliable operation of Ontario’s power system. The company is also responsible for managing Ontario’s wholesale electricity market, through which the supply and demand for electricity are kept in balance and the Hourly Ontario Energy Price is set.

Defined by statute as a non-profit corporate entity without share capital, the IESO was established by the Government of Ontario through the *Electricity Act, 1998*. The IESO is governed by a Board of Directors appointed by the Ontario Minister of Energy and Infrastructure.

Additional information regarding the IESO can be found at the IESO website:

[www.ieso.ca](http://www.ieso.ca)

The Smart Grid Forum is a cross-industry initiative to further Ontario’s efforts in utilizing smart grid technologies for the benefit of consumers. The President and CEO of the IESO acts as Chair of the Forum and the IESO facilitates the Forum and hosts Forum meetings.

### Purpose of this RFQ

The purpose of this RFQ is to select an external firm to provide communications services in support of the Ontario Smart Grid Forum, specifically, the preparation of the 2010 annual report of the Ontario Smart Grid Forum.

### Scope of Work

The selected Respondent will be expected to perform the following services:

1. Expert guidance in the development of a public report on the proceedings and findings of the Ontario Smart Grid Forum is needed. The report will be approximately 20 pages in length, not including appendices. The report of the Ontario Smart Grid Forum for 2010 is largely intended as an update to the topics, issues and recommendations previously published in the 2009 report entitled, *Enabling Tomorrow’s Electricity System*, which is available on the IESO public website at the following location:

# Request for Quotation (RFQ)



[http://ieso.ca/imoweb/pubs/smart\\_grid/Smart\\_Grid\\_Forum-Report.pdf](http://ieso.ca/imoweb/pubs/smart_grid/Smart_Grid_Forum-Report.pdf)

As of the date of this RFQ, the Ontario Smart Grid Forum is continuing to review a draft table of contents for the 2010 report, which is appended to this RFQ as **ATTACHMENT 'A for information proposes only**. This draft table of contents may be subject to change as the Ontario Smart Grid Forum continues to deliberate on this matter. The respondent will need to flexibly respond to changes in the scope of the report as a result of the ongoing review of its structure by the Ontario Smart Grid Forum, up until the commencement of the drafting process.

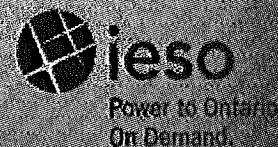
2. Gathering information from Forum records and from Forum members to support the various discussion topics in the report with the assistance and guidance of IESO staff and members of the Ontario Smart Grid Forum.
3. Drafting an initial version of the report for joint review by IESO staff and members of the Ontario Smart Grid Forum and engaging in an iterative, but time-bounded editing process in which the respondent will be responsible for circulating draft versions of the document for comment, tracking comments, addressing comments and maintaining adequate version control over the report itself.
4. The writer will also need to perform final copyedits and reviews of the laid out document before it goes to press.
5. It is anticipated that the writer will need to conduct interviews with Forum members as part of the research for the report and attend up to 5 half day meetings. These services will be provided in accordance with IESO Contract Standard A-29-10 attached under separate cover.

## Experience

The successful Respondent must demonstrate the following attributes.

- Expertise and knowledge in the energy and utilities sectors
- Expertise and knowledge in the field of Smart Grid and its impact on the electricity industry

# Request for Quotation (RFQ)



- Exceptional editorial skills, translating technical and complex concepts into clear and engaging narrative

## Instructions to Respondents

### Confidentiality Agreement and Receipt of Confirmation

The Respondent shall return the completed Non Disclosure Agreement (Appendix A) and Receipt Confirmation Form (Appendix B) by fax to the IESO representative (Mr. Robert Rankin) before **11:00 a.m. Thursday November 11, 2010** indicating their intention to submit a quotation response.

### Submission of Quotations

The Respondent is required to submit their quotation in response to this RFQ on or before **11:00 am on Wednesday November 17, 2010** (the "Closing Date/Time") at:

Independent Electricity System Operator

Attention: Mr. Robert Rankin, Procurement Specialist

Quotations must be submitted by facsimile or electronic mail.

The Quotation must be clearly marked as "**Report Writing Services RFQ**" along with the Respondent's full legal name and return address.

The Quotation must be in the form as outlined below.

Quotations received after the Closing Date/Time will not be considered.

Pricing component must be in a separate attachment.

Quotations and communications must be sent to [rob.rankin@ieso.ca](mailto:rob.rankin@ieso.ca) and [rfp.info@ieso.ca](mailto:rfp.info@ieso.ca).

# Request for Quotation (RFQ)



## Timetable for RFQ and Engagement

The timetable for this RFQ is set out below. The IESO reserves the right to alter the timetable as the IESO may determine in its sole and absolute discretion and on notice to the Respondents.

Time Table and Milestones	Dates & Times (EST)
Issue Date of Request for Quotation	November 8, 2010
Deadline for Non Disclosure Agreement and Receipt Confirmation Form	11:00 am November 11, 2010
Deadline for Submission of Questions	11:00 am November 11, 2010
Deadline for IESO Issuing Addendum	November 12, 2010
Closing Date/Time for RFQ Submission	11:00 am November 17, 2010
Selection Notice and Enter into Agreement	November 30, 2010
Services Commence	December 2010
Report finalized for publication and delivered to IESO	February 2011

## Quotation Form and Structure

The Respondent shall submit quotation / proposal and supplementary information that address the following:

- a) Executive Summary;
- b) Understanding of IESO Requirements;

# Request for Quotation (RFQ)



- c) Approach, Methodology and Deliverables;
- d) Fees including:
  - Hourly rates – “Time & materials contract” for all resources required
  - Estimated number of hours for all deliverables under “Scope of Work”
  - Expenses and Administrative charges are to be included in the rates; and
- e) All requests for amendment to IESO’s Contract Standard A-29-10 must be identified on a point by point basis. NOTE: The IESO will not reimburse the Contractor for expenses or administrative charges. Accordingly, these expenses should be included as part of the hourly rates.

## **Signing of Quotation, Amendments and Notice of Withdrawal**

An authorized signing officer of the Respondent must sign the Quotation, any amendment to the Quotation, or a notice of withdrawal for the Quotation.

## **References**

The Respondent will provide a minimum of two references for services that it has provided – within the last three years – of similar scope and complexity to services listed herein. Each reference will include a description of the materials and services provided, the client’s name, the name of a client contact and phone number, and the results achieved.

## **Reference Checks**

The Respondent must consent to the IESO contacting the references listed in its Quotation.

# Request for Quotation (RFQ)



## RFQ Evaluation Process & Criteria

The initial stage of the RFQ response evaluation process will be to review each quotation to determine, in the IESO's sole and absolute discretion, whether the quotation response addresses the scope of work. Quotations that do not shall be disqualified.

The IESO will evaluate the qualified quotations based on the following criteria.

Evaluation Criteria	Weight
Firm Experience and Expertise	30%
Understanding of, and ability to meet the IESO's requirements	20%
Cost of delivering service-hourly rates - lowest estimated cost	40%
Past performance/supplied reference checks	10%

## Disqualification

The IESO may, in its sole and absolute discretion, and without liability, cost or penalty, disqualify any Quotation before the Quotation is fully evaluated if, in the opinion of the IESO:

- the Quotation contains false or misleading information; or
- the Respondent or any of its employees, agents, contractors or representatives contact any member of the IESO other than the IESO Procurement Specialist with respect to this RFQ.

## Respondent's Representative(s)

The Respondent must identify one or more persons as the authorized representative(s) of the Respondent for all matters relating to the Respondent's Quotation or to any subsequent Contract between the Respondent and the IESO. The Respondent must confirm that anything said or done by such representative(s) shall be deemed to have been said or done by the Respondent.

# Request for Quotation (RFQ)



## **RFQ Terms and Conditions**

### **IESO's Right to Amend, Supplement or Cancel this RFQ**

The IESO may at any time prior to the Closing Date/Time, alter any dates in this RFQ, or cancel this RFQ without incurring any liability, cost, or penalty. It may amend or supplement the RFQ, at any time prior to the Deadline for issuing Addenda, as set out in the Timetable for this RFQ, by issuing an Addendum in the same manner in which this RFQ is issued. After the Closing Date/Time, the IESO may also elect not to accept any of the Quotations, or to accept only part of a Quotation – again without incurring any liability, cost or penalty.

### **Withdrawal of Bids**

Quotations shall be irrevocable for sixty (60) days from the Closing Date/Time and all bids shall be firm.

### **Confidentiality**

All information supplied by or obtained from the IESO, or derived from any information which the Respondent may have acquired in connection with this RFQ and the selection and negotiation process under this RFQ, both before and after the issuance of this RFQ:

- is the sole property of the IESO and must be treated as confidential;
- is not to be used for any purpose other than responding to this RFQ and the fulfillment of any subsequent Contract;
- must not be disclosed (unless required by law) without prior written authorization from the IESO; and
- must be returned to the IESO upon request.

The Quotation and any accompanying documentation submitted by the Respondent prior to the Closing Date/Time shall become the property of the IESO and shall not be returned. Documents provided by a Respondent and specifically identified as being confidential, will be held in confidence and will not be released by the IESO (unless required by law), without prior authorization of the Respondent.

### **Costs of Responding**

All costs and expenses incurred by the Respondent relating to the preparation or presentation of its Quotation response or in any way related to this RFQ shall be borne



## Request for Quotation (RFQ)



by the Respondent. The IESO shall not be liable to pay, or reimburse or compensate, the Respondent for such costs and expenses under any circumstances.

### **FIPPA Compliance**

The Respondent acknowledges that the *Freedom of Information and Protection of Privacy Act* (FIPPA) applies to the IESO. The Respondent acknowledges that the terms and conditions of the contract that will be entered into between a successful Respondent and the IESO may be disclosed by the IESO where the IESO is obligated to do so under FIPPA, by an order of a court or tribunal or pursuant to a legal proceeding.

## Attachment 'A'

**(Provided for information purposes only - subject to review and amendment by the Ontario Smart Grid Forum)**

### ***Ontario Smart Grid Forum 2010 Annual Report***

#### **Draft outline**

#### **Executive Summary:**

- Major developments since the publication of the 2009 report.
- Summary of current state of the smart grid in Ontario.
- Summary of key recommendations contained in this report.

#### **Proposed Section 1 – The Evolving Smart Grid Vision and work of the Ontario Smart Grid Forum since 2009:**

##### ***1-1 Definition of the Smart Grid under Green Energy Act and its implications:***

##### ***1-2 Highlights from the Forum's work since early 2009:***

#### **Proposed Section 2 – Current state of previous recommendations of the Smart Grid Forum:**

This section would be a follow-up to the 'key recommendations' put forward in the 2009 report of the Forum (ref.: page 6) including:

##### ***2-1 Current state of the legislative and regulatory framework<sup>1</sup>:***

##### ***2-2 Current state of consumer access to data<sup>2</sup>:***

##### ***2-3 Current state of electricity sector cooperation in the following areas<sup>3</sup>:***

<sup>1</sup> Reference: *Enabling Tomorrow's Electricity System*, pages 6, 15, 37

<sup>2</sup> *Ibid.* pages 6 and 18

<sup>3</sup> *Ibid.* pages 6, 24, 29-30 and 33

# Request for Quotation (RFQ)



*2-4 Current state of a comprehensive plan to enable electric vehicles in Ontario<sup>4</sup>:*

*2-5 Current state Ontario Smart Grid Investment Research and Development <sup>5</sup>:*

## **Proposed Section 3 – Sector Perspectives:**

Results of polling on specific topic areas with a focus on identifying perceived smart grid barriers and opportunities in the following categories:

*3-1 Transmission and Distribution Sector Perspectives*

*3-2 Consumer Perspectives*

*3-4 Government and Regulatory Agencies Perspectives*

*3-5 Private Sector members of the Partners Committee*

## **Proposed Section 4 – Conclusions and near-term recommendations for 2011:**

*4-1 Recommendations – Protecting Consumer Privacy*

*4-2 Recommendations - Consumer Control;*

*4-3 Recommendations - Utility Flexibility;*

*4-4 Recommendations - Adaptive Infrastructure;*

*4-5 Recommendations - Over-arching smart grid issues that affect the above three areas (e.g. security, interoperability, etc.).*

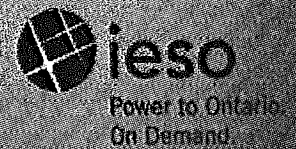
## **Potential Appendices:**

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<sup>4</sup> *Ibid.* pages 6 and 40

<sup>5</sup> *Ibid.* pages 6 and 42

# Request for Quotation (RFQ)



## *Appendix 1: Membership*

Membership of the Smart Grid Forum, the Working Group and the Partners Committee

## *Appendix 2: Smart Grid Principles*

## *Appendix 3: Membership of the Corporate Partners Committee*

## *Appendix 4: Pilot/Demonstration Projects*

## *Appendix 5: Smart Grid Innovative Technology Case Studies*