



WEC Energy Group

REQUEST FOR PROPOSALS

Smart Thermostat Rewards Pilot Services

235571

Date Posted: July 14th, 2025

- Responses must be received not later than **5:00 PM CDT, Wednesday August 13th, 2025**
- Late responses will not be considered

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DEFINITIONS AND ACRONYMS

Unless the context clearly requires otherwise, the capitalized terms used in this document shall have the definitions assigned to them as listed below. These definitions apply to all exhibits and attachments and shall apply equally to both the singular and plural forms of the terms defined, and words of any gender shall include each other gender when appropriate.

Definitions:

- **Bidders:** Any firm or team of firms responding to this Request for Proposals (RFP).
- **Bring Your Own Device Program.** A type of program targeting customers for enrollment who already own or purchase their own qualifying Device.
- **Company.** WEC Business Services LLC.
- **Device:** In the context of this RFP, refers exclusively to smart thermostats, unless otherwise specified.
- **DERMS.** Distributed Energy Resource Management System with the key function of dispatching the flexibility of end-use loads.
- **Event.** In the context of this RFP, periods of high electricity demand periods either max generation events declared by MISO, or other events declared by the Company based on reducing costs for utility customers.
- **Provider.** Successful Bidder that contracts with the Company.

Acronyms:

- **BYOD.** Bring Your Own Device
- **CIS.** Customer Information System
- **CST.** Central Standard Time
- **DERMS.** Distributed Energy Resource Management System
- **FTE.** Full-Time Employee
- **GIS.** Geographic Information Systems
- **MISO.** Midwest Independent System Operator
- **MBE/WBE's.** Minority, Women Business Enterprises
- **OEMs.** Original Equipment Manufacturers
- **PSC.** Public Service Commission of Wisconsin
- **RFP.** Request for Proposals
- **SOW.** Scope of Work
- **SFTP.** SSH File Transfer Protocol.
- **WEPCO.** Wisconsin Electric Power Company DBA as We Energies
- **WPS.** Wisconsin Public Service Corporation

I. INTRODUCTION

1.1 Company Introduction

WEC Business Services LLC, for itself, its parent, and affiliates, (hereinafter referred to as the "Company" or "WEC"), invites you to submit a proposal for the services described in this Request for Proposals (RFP).

WEC Energy Group (NYSE: WEC), based in Milwaukee, is one of the nation's premier energy companies, serving 4.7 million customers in Wisconsin, Illinois, Michigan and Minnesota. We are one of the nation's largest electric generation and distribution and natural gas delivery holding companies, with deep operational expertise, scale and financial resources to serve the Midwest's energy needs and meet future energy needs. We focus on safety, reliable service, customer satisfaction and shareholder value.

Our scale and geographic proximity allow for operating efficiencies across our 72,000 miles of electric distribution lines, 46,400 miles of natural gas distribution and transmission lines, and 8,300 megawatts of reliable power plant capacity.

WEC is committed to delivering world-class reliability and the very best customer care anywhere. Our customers are at the heart of our business, and we work every day to help grow and support communities where we provide vital energy services. As a Fortune 500 company, we value and develop our employees who are making a difference in a mission that matters.

The Company's principal utilities are We Energies (WEPCO), Wisconsin Public Service Corporation (WPS), Peoples Gas, North Shore Gas, Minnesota Energy Resources, Michigan Gas Utilities, Upper Michigan Energy Resources and Bluewater Gas Storage. The Company's other major subsidiaries, W.E. Power LLC, designs, builds and owns modern efficient power plants, WEC Infrastructure LLC, ownership interests in wind generating facilities, and Wispark, high-quality complex real estate projects.

Based in Milwaukee, We Energies (**WEPCO**) provides affordable, reliable and clean energy to more than 2.3 million customers across Wisconsin. As of December 2024, WEPCO has 2,873 active employees serving more than 2.2 million combined natural gas and electric customers as well as 369 steam customers in downtown Milwaukee.

Based in Green Bay, Wisconsin Public Service (**WPS**) provides affordable, reliable and clean energy to approximately 470,000 electric and 347,000 natural gas customers in northeastern and north central Wisconsin.

1.2 Pilot Background

WEPCO and WPS have been ordered by the Public Service Commission of Wisconsin (PSC) (Docket: 5-UR-111 WEPCO and 6690-UR-128 WPS) to implement a Bring Your Own Device residential load control pilot. The order lays out the following specifications:

- **Eligibility:** Residential electric customer having both central air conditioning and a smart thermostat (Device)
 - Maximum of 64,000 Devices at WEPCO for customers in rate schedules Rg1 and Rg2.

- Maximum of 24,000 Devices at WPS for customers in the following rate schedules: Rg-1, Rg3-OTOU, and Rg5-OTOU.

Table 1. Number of WPS/WEPCO customers on applicable rate schedules for Pilot

WEPCO Rate Schedules	Customer Count on Rate Schedule
Rg1	1,023,000
Rg2	14,900
WPS Rate Schedules	Customer Count on Rate Schedule
Rg-1	405,000
Rg3-OTOU	6,508 (closed)
Rg5-OTOU	2,600

- **Pilot Timeline:**

- 2025: Select vendor and prepare internal systems for implementation
- January 1, 2026: Start enrollments
- June 1, 2026: Ability to start calling Events

1.3 RFP Objectives

Via this Request for Proposals the Company seeks a qualified firm (Provider), or team of firms, to provide turnkey solutions (Services) for a **residential load control pilot focused on thermostat** devices, hereafter called the **Smart Thermostat Rewards Pilot**. These Services will be provided for the service territories of two operating companies, WEPCO and WPS, and will include a distributed energy resource management system (DERMS) platform, Device integration, demand response event support, post-event measurement and reporting, and other related activities.

The Company's objectives for the Smart Thermostat Rewards Pilot include:

- Improve grid reliability, affordability, and customer engagement.
- Evaluate the effectiveness of the Pilot with an initial population of customers and determine if cost-effective.
- Understand costs associated with running the Pilot.
- Learn from the scope of the Pilot and weigh future size and scope expansions.
- Identify opportunities to include additional technologies and fuel sources in the future.

The Company has a desire for a timeline that will result in customer enrollment starting any time after January 1, 2026 with the ability to start calling events by June 1, 2026. The Pilot period will encompass 24 months to include two cooling seasons.

1.4 Additional Pilot Information

WEC's **Smart Thermostat Rewards** will be a new demand response Pilot that enables electric load curtailment and demand reduction capabilities from eligible residential customers. The Pilot will be optional for residential customers within WEPCO and WPS service territory who have central air conditioning, a qualified smart thermostat (Device), and who agree to provide WEPCO and WPS with the ability to remotely adjust the temperature setting on the Device to reduce electrical demand during

Events. This Pilot should serve both customers with already installed Devices and those seeking new installations, however, direct install of thermostats is outside the scope of this Pilot.

The Company anticipates that customers will be incentivized to participate in the Pilot via a one-time enrollment incentive and be offered additional seasonal participation incentives for allowing the Company to adjust their electric cooling system during periods of peak demand. Incentives will be processed as credits on the customer's bill by the Company, based on customer incentive reports produced by Provider.

Further, the Company expects that the Provider will be responsible for providing an enrollment mechanism for interested customers, as well as minimal customer outreach. Once a customer is enrolled, the Company will receive customer enrollment information from Provider and would verify the applicant to ensure eligibility (active account and address located within WPS/WEPCO service territory). If the applicant is indeed eligible, the Company will notify the Provider and communication will be sent to the customer confirming enrollment. The Company will also update its billing system to allow for incentive processing.

For each Event, the Company would like the ability to elect to dispatch either all participating Devices, or subsets of participating customers grouped by utility provider, geographic zone, customer type, or Device type.

Though the Pilot is focused exclusively on smart thermostats, the Company is interested in understanding opportunities for including additional demand response technologies in the future, during a potential post-Pilot phase. This includes the ability to support natural gas demand response programs as well as battery storage systems, heat pump technologies, and electric vehicle chargers, among other potential solutions.

Additional relevant highlights from the PSC order: *"The Commission finds it reasonable to require WEPCO and WPS to complete a statistical evaluation on the effectiveness of the BYOD Pilot and provide those results to the Commission both within 18 months and within 24 months of the implementation date. At the 18 and 24-month points in the Pilot, the evaluation, with data reported by the Provider, shall identify the costs of the Pilot, participation, and savings. As part of this evaluation, WEPCO and WPS shall also report on its efforts to collaborate with interested stakeholders regarding potential modifications or extensions to the BYOD Pilot."*

1.5 Provider Scope of Work

Provider will be responsible for all aspects of the Pilot except for customer eligibility verification, on bill incentive processing, and initiation of load management demand response Events. It is anticipated that the Provider will:

- Meet regularly with the Company staff to update on Pilot status, activities completed, and to recommend necessary adjustments.
- Be responsible for Pilot outreach (though it is anticipated to be minor) and customer enrollment, including annual re-verification process.
- Provide and maintain a system or integrate control of demand response Events with the existing WEC distributed energy resource management system (DERMS) to enable management of Events in accordance with retail tariff design.

- Work with the Company to determine Event criteria and process.
- Execute Events declared by the Company and/or allow the Company to initiate Events including the ability to establish factors related to the Event such as pre-cooling parameters.
- Manage relationships with original equipment manufacturers (OEMs) and other third-parties related to load control, including establishing any contracts required to connect and communicate with Devices.
- Manage communications to Devices and control them during Events, including providing a minimum of one hour notice to impacted customers prior to the start of an Event and notice for the ending of an Event.
- Report regularly on customer enrollment and event data (after each event) including participation and opt-out numbers, individual and aggregate kWh/kW reductions, incentive spend, and other key performance indicators. Reports must be able to segregate data by utility and customer rate class.
- Produce information needed for the Company to process incentive payments as bill credits, including identification of any customers who opted out of an Event and at what time(s).
- Assist in preparation of regulatory reporting requirements by providing data, including but not limited to, confidential information the Company is required to provide to various regulatory entities. If necessary, such information will be filed confidentially so as not to disclose trade secrets or proprietary methods.
- Produce a Final Pilot Report at the conclusion of the Pilot that includes a summary of activities and results, and offers recommendations to the Company should the Pilot be converted into a full program, including but not limited to changes to incentive levels, modifications to delivery approach, expanded customer participation targets, recommendations for event duration and frequency, MISO market participation strategy for enrolled resources, and future technology options including opportunities to expand to other technologies and include natural gas demand response.

1.6 Information on WEC's IT Systems

To implement and operate the DR program, UTILITY'S vendor must integrate with multiple enterprise IT systems:

In your response describe:

- The format and protocols you are currently using for data transfers between the Company and the vendor
- The commercialized solution you have available for verifying customer eligibility and communicating that eligibility status between the vendor and the Company
- Demonstrate your compliance with the Company's required data security and integrity standards.

Be aware that the company may be required to share certain confidential data with regulators to comply with rate orders.

1.7 RFP Schedule and Significant Dates

The tentative schedule for this RFP is shown in Table 2. RFP Schedule, representing the Company's best estimate of the timeline that will be followed. All times indicated are Central Daylight Time (CDT). If a component of this schedule, such as "Proposed Due Date/Time" is delayed, the rest of the schedule will likely be shifted by the same number of days.

Any change to the RFP Schedule shall be reflected in and issued in an addendum.

Table 2. RFP Schedule

Milestone	Date
Release of Request for Proposals (RFP Opens)	July 14, 2025 8:00 AM CDT
Pre-Proposal Bidder's Call	July 18, 2025 at 11:00 AM CDT
Deadline to Submit Written Questions	July 23, 2025 at 12:00 PM CDT
Deadline to Provide Notice of Intent to Bid	July 23, 2025
Company's Response to Written Questions (if applicable)	August 1, 2025
Proposals Due	August 13, 2025 5:00 PM CDT
Requests for Interviews	August 26, 2025
Interviews Conducted	September 3 – 5, 2025
Notice of Award (estimate)	September 12, 2025
Contract Start Date (estimate)	October 2025

1.8 Pre-Proposal Bidder's Call

The purpose of the Pre-Proposal Bidder's Call is to provide Bidders with an opportunity to be briefed and to ask questions about the RFP process. The call will provide an overview of the RFP and the scope of work being requested.

The Pre-Proposal Bidder's Call is not mandatory; however, Bidders are encouraged to attend to gain a better understanding of the requirements of this RFP. If attending, please register directly on the Registration Link included below.

Date: July 18, 2025

Time: 11:00 AM CDT

Location: https://us06web.zoom.us/meeting/register/8VUCk_rlTRildM8cY-ZZ7A

Bidders are advised that anything discussed at the Pre-Proposal Bidder's call does not change any part of this RFP.

1.9 Intent to Bid

To understand the pool of potential Bidders and be able to plan for the number of potential responses the Company might receive, Bidders are requested, but not required, to provide an Intent to Bid before submitting their proposal.

Intent to Bid must be submitted via Wood Mackenzie no later than **5:00 PM CDT Wednesday, July 23, 2025**.

1.10 Questions and Answers

Any commercial or technical questions related to this RFP must be submitted in writing using the Messaging feature in Wood Mackenzie by **5:00 PM CDT Wednesday, July 23, 2025**.

No questions will be accepted after the Deadline to Submit Written Questions.

Answers will be posted on the Wood MacKenzie event on the date specified in **Table 2**.

1.11 Supplier Diversity Initiative

The Company maintains a goals-oriented policy which seeks to assure that Minority, Women Business Enterprises (MBE/WBE's) have full access to opportunities to furnish goods and services. Accordingly, Bidder is encouraged to utilize these businesses in fulfilling the work requirements and is requested to identify them in their proposal submittal.

Note: If this inquiry results in a subcontract solicitation which could result in an award of greater than \$100,000, you must indicate in your proposal submittal whether any MBE/WBE concerns were solicited and if not, why not. (If subcontract proposals are not being solicited for purposes of this submittal, should you receive an award and during the duration of the project subcontract solicitations of greater than \$100,000 do occur, you will be required to provide this information at that time.) Positive responses to this area of concern will be considered favorably in our evaluation of your proposal.

Additional information on the Company's Supplier Diversity Initiative is available [here](#).

II. INSTRUCTIONS TO BIDDERS

2.1 Bidder Platform Registration

Bidders interested in submitting a proposal must register in Wood Mackenzie at:

<https://www.poweradvocate.com>

Bidders joining the RFP after event opens (7/14/2025 8:00 AM CDT) will need to register and receive invitation from bid event coordinator, Pierce Anderson.

To receive an invitation via Wood Mackenzie, Bidders must contact bid event coordinator via email (pierce.anderson@wecenergygroup.com) under the following format:

- Header: **[Company Title] Requests Access to RFP:235571**
- Message: State your Name (First & Last), Company Name, and all contact(s) of Users to be added/invited to the bid event.

Registration for this RFP will be open until the RFP response due date.

2.2 Proposal Submittal Instructions

To be considered, proposals should be submitted via Wood Mackenzie not later than **4:00 PM CDT Wednesday August 13, 2025**.

Upon receiving a proposal, the Company will issue a response confirming receipt.

For questions regarding this process, please contact Pierce Anderson at pierce.anderson@wecenergygroup.com. Any contact with any other Company representative regarding this RFP during the open RFP period, will automatically disqualify the Bidder.

Bidders must respond to all proposal requirements as specified below for three submittal components:

- Technical Proposal
- Cost Proposal
- Required Appendices and Forms
 - Attachment A – Standard Agreement
 - Attachment B – Bidder Security Controls Questionnaire Form
 - Attachment C – Cost Detail

2.3 Technical Proposal – Response Requirements

The Bidder's Technical Proposal must be a single PDF document following the format and order specified below. The Company prefers concise proposals that address all requirements clearly and pointedly. Technical Proposal should not exceed 25 pages, excluding attachments. Pages must be numbered consecutively. *This document should NOT include cost detail.*

Bidders may provide any other information thought to be relevant, but not applicable to the listed sections below, as attachments.

Response Requirements:

1. **Cover Letter.** Signed by an agent authorized to execute legal documents on behalf of the Bidder. Include contact information for Bidder's contact person.
2. **Table of Contents.**
3. **Introduction.** Provide an overview of Bidder's firm and describe why your firm is uniquely suited to perform the scope of work requested.
 - **Company Overview.** Introduce Bidder company including legal name, years in operation, type of business structure (corporation, partnership, etc.), capabilities, total number of employees, current office location(s), local staff, and any diverse business certifications if applicable.
 - **Subcontractors.** Include similar information on any Subcontractors that are partnering on this proposal. Identify how the scope of work will be allocated amongst partners.
 - **Approach and IT Solution.** Provide a high-level overview of the proposed approach to providing the Scope of Services and IT Solution to be used for the Pilot.
4. **DERMS Solution Overview.** Describe the DERMS solution to be used for this Pilot, including identification and description of any software components to be deployed. Include a system architecture diagram indicating integrations, mechanisms for control, event management, and high-level data flows between the solution, enrolled Devices, and WEC systems. Include information on your software license and service level agreements, if any. Incorporate representative "screen shots" of your proposed system.

Highlight capabilities of solution to provide:

- Event scheduling in "real-time" (hour-ahead) and for the future.
 - Ability to perform target dispatch for groups of participants for example: customers for each utility (WPS, WEPCO), by geographic zone, Device type, or any other attributes.
 - Ability for the Company to monitor in real time, or near real-time, key performance metrics related to the Event.
 - Post-event performance data as reports showing total and average results of events, as well as snapshots of customer enrollment on a quarterly basis.
 - Ability to forecast the estimated savings from an immediate event or future event prior to starting the event (whether part of DERMS platform or separate solution).
 - Any other unique control capabilities of your platform.
5. **Approach to the Scope of Services.** Bidders should respond to items in **V. SCOPE OF SERVICES REQUESTED.**
 6. **Innovation and Future Opportunities:** Describe Bidder's approach to continual innovation and potential future inclusion of additional customer segments as well as demand response technologies, such as battery storage systems, water heaters, electric vehicle chargers, and technologies to support natural gas demand response. Describe Bidder's ability to develop a solution that is scalable and flexible.

7. **Risks and Success Strategies:** Identify any risks you foresee for this Pilot and propose corresponding risk mitigation strategies. Highlight any program design ideas and strategies to operate a successful Pilot that you would want to call out for the Company.
8. **Pilot Timeline.** Include a proposed timeline in an easy-to-read format (e.g., Gantt chart) that meets the PSC requirements for launch as described in **1.4 Additional Pilot Information**. The Timeline should span from initial contract signing to Pilot launch and delivery for the contract period ending December 2027. Outline all appropriate milestones.
9. **Experience.** To demonstrate Bidder's experience with residential load control programs for utilities, Bidders must provide the following information:
 - **Relevant Experience.** Describe Bidder's experience with comparable efforts. Identify how many years of relevant experience the Bidder has and any tools and systems that will enable Bidder to provide services requested in the RFP.
 - **Project Examples.** Include at least three (3) relevant project examples from the last five (5) years supporting your ability to successfully manage a contract of similar size and scope for the work described in this RFP. Project examples should include the client's name, a brief project overview, dates for the project, approximate budget, and a description of how that project is relevant to the services requested through this RFP.
 - **Client References.** Provide three (3) client references that may vouch for your work. Include reference name, title, company name, phone and email contact information.
10. **Key Personnel.** Provide a program organizational chart for the Bidder and any Subcontractors, if applicable, identifying key individuals that will be working on this pilot and their proposed roles. For every key personnel identified, short bios should be provided highlighting background and experience with similar work performed. One-page resumes should be included as attachments.
11. **Other Information.** Provide any additional information that may be useful in evaluating your proposal.

2.4 Cost Proposal – Response Requirements

Bidders should provide their Cost Proposal as a separate document that includes a narrative describing pricing assumptions, services and products included, and any cost items that might be optional and additional. In addition, Bidders must complete the Cost Detail template included as Attachment C to this RFP.

Pricing for the collective products and services being offered should be provided in sufficient detail such that the Company will understand precisely what is being proposed. Bidders should consider the following:

- Pricing should exclusively focus on smart thermostat Devices.
- Pricing should be inclusive of all items listed in **Section 1.5 Provider Scope of Work**.

- Account for up to the maximum number of customers and Pilot timeline identified in the PSC order (**1.2 Pilot Background**). Any upfront costs should be included in Year 1 of the Pilot.
- Pricing should be provided for three Tier scenarios that vary based on the volume of Devices to be enrolled, as defined in the Cost Detail Template. Bidders are allowed to propose a different tiering structure if they wish to, so long as they identify the number of Devices to be considered in each tier.
- Customer incentives to be paid by the Company should not be included in Pricing.

Cost Narrative: Maximum three (3) pages.

- Explain Bidder's approach to pricing and the different categories of costs included.
- Identify any additional optional services or platform "add-ons" that you recommend for the Company's consideration. These should not be included in the base price.
- Identify any Licensing costs for the proposed platform, and the number of users that can be accommodated for the Company.
- List any assumptions, caveats, or further explanations related to your pricing that are important for the Company to understand the total cost of selecting your firm for the desired products and services.

Cost Detail Template: Bidder must complete the attached Cost Detail Template with costs itemized and broken out into logical categories to facilitate the review process. Pricing must be provided separate for each year of the Pilot.

2.5 Attachments – Response Requirements

Bidders must include the following attachments as part of their response:

- Attachment A – Any exceptions to Standard Agreement, if applicable via a red-lined copy.
- Attachment B – Completed Vendor Security Controls Questionnaire.
- Attachment C – Cost Detail.

At their discretion, Bidders may provide any additional information that may be useful for purposes of the selection process. Please refrain from including any extraneous sales material or attachments.

2.6 Proposal Validity Period

All proposals and pricing submitted by Bidders will remain open to acceptance and are valid for a period of ninety (90) days from the date of submission.

2.7 Proposal Preparation Costs

Any and all costs incurred by the Bidder in preparing or submitting a proposal shall be the Bidder's sole responsibility whether or not any award results from this RFP. The Company shall not reimburse such costs.

2.8 Mistakes in Proposals

Bidders are responsible for reviewing responses for any errors. A single (1) response will be permitted per Bidder. Corrections or updates to the Proposal submission will not be accepted.

III. EVALUATION PROCEDURE AND CRITERIA

3.1 Proposal Evaluation Process

Compliance Review (Phase 1)

The Company shall review each submission for responsiveness to ensure the proposal meets mandatory requirements specified in this RFP. No points will be assigned for these requirements. The purpose of this phase is to determine whether a Bidder's proposal is sufficiently responsive to the RFP to permit a complete evaluation. Failure to meet the mandatory requirements may be grounds for deeming the proposal non-responsive to the RFP and may result in non-consideration.

The following will be considered on a pass/fail basis:

- Responses must be received by the due date and time specified in this RFP.
- Technical Proposals must include all sections as noted in **2.3 Technical Proposal – Response Requirements**.
- Cost Proposals must include a budget narrative in addition to the template included in this RFP – **Attachment C. Cost Detail**.
- Responses must include any mandatory Attachments specified in **2.5 Attachments – Response Requirements**, including a red-lined copy of the sample Agreement, if applicable.
- Proposals offering any other set of terms and conditions that conflict with the terms and conditions provided in the RFP may be rejected without further consideration.

Proposal Evaluation (Phase 2)

Only those responses found to have met Phase 1 criteria will be considered for review in Phase 2.

The Company shall score proposals by reviewing the information submitted in both the Technical Proposal and Cost Proposal responses. The factors and weighting on which responses will be evaluated are:

Table 3. Evaluation Criteria

Technical Proposal (Subtotal)	80 points
Approach to the Scope of Services	30 points
Solution Overview	20 points
Innovation and Future Opportunities	5 points
Pilot Timeline	5 points
Experience	15 points
Key Personnel	5 points
Cost Proposal – Narrative and Pricing (Subtotal)	20 points
Total	100 points

Virtual Interviews and Demonstrations (Phase 3)

The Company may invite up to three (3) Bidders from Phase 2 to present their proposals during a virtual interview and platform demonstration process. It is anticipated that interviews will take place the week of August 25th, as specified in section **1.7 RFP Schedule and Significant Dates**.

A Bidder that is requested to interview and fails to make the interview on the scheduled date will not be considered for the final award. Any and all costs incurred by the Bidder in making the presentation will be the Bidder's sole responsibility and will not be reimbursed by the Company.

3.2 Negotiations and Award

The Company will notify the successful Bidder in writing. This notification will initiate the Statement of Work and Professional Services Agreement negotiations process between the parties. If the Company and the selected Bidder are unable to reach a consensus in a timely manner, the Company may terminate negotiations and begin negotiations with the next highest-scoring Bidder.

3.3 Reservation of Rights

The Company reserves the right, without qualification and in its sole discretion, to reject any and/or all proposals submitted in response to this RFP and to waive any informality, technicality or deficiency in any proposal received. Bidders submit proposals agree to do so without recourse against Company for either rejection or failure to execute a formal contract associated with any accepted bid.

Additionally, the Company reserves the right to request additional information that may be needed to ascertain a Bidder's qualifications, and to negotiate any price, provision or service present in a proposal.

IV. TERMS AND CONDITIONS

4.1 Anticipated Contract Term

The term of the contract is anticipated to start upon Contract execution and will end December 2027 for a two-year period. Should the Pilot be successful, and pending any additional requirements from PSC, the Company reserves the right to extend and expand contract to a full-scale program.

The successful Bidder shall not start the performance of any work prior to the effective date of the contract, and the Company shall not be liable to pay the selected Bidder for any service or work performed or expenses incurred before the effective date of the contract.

4.2 Agreement

Attached to this RFP is the Agreement that would govern in the event of a contract award – **Attachment A. Services Agreement**. In the event Bidder does not agree to the Agreement in its entirety, Bidder shall upload a redlined version of the Agreement along with their proposal.

If the Bidder currently has a signed Agreement with Company, the current Agreement would govern the award.

Award will be pending countersigned Agreement and possible project-based confidentiality agreements.

4.3 Cyber Security Review

Provider's solution shall meet or exceed all cyber security requirements of the Company, as outlined in **Appendix B – Vendor Security Controls Questionnaire**.

4.4 Regulatory Entity Information

The Company and all of its entities is, or is affiliated with regulated utilities. If the Company is required by a regulatory entity to determine segregated costs of "units of property", the Provider agrees to furnish such breakdown of costs as is required by said regulatory entity and to assist the Company in such determinations.

4.5 Payment Terms

Are to be mutually established on Agreement. WEC uses Net 40 payment terms as a standard, and as stated within the Agreement.

4.6 Invoice Payment

Invoices will be paid in accordance with the Electronic Transaction Policy after receipt of goods in acceptable condition or satisfactory completion of services and receipt of invoices provided invoices are submitted in accordance with the Invoice Preparation Requirements.

4.7 Electronic Transaction Policy

The Company utilizes a complete electronic order to pay process via a supplier web portal at no charge to the Provider. Participation is MANDATORY to become or maintain status as an approved Provider.

The following electronic transactions are processed through this portal:

- Transmitting purchase orders
- Processing confirmations/acknowledgements, advance ship notice (ASN), and changes on purchase orders
- Accepting and processing of invoices

All Providers are expected to adopt and use this web portal for:

- Accessing/viewing/printing purchase orders
- Invoice submission
- Invoice status
- Updating supplier information such as addresses, contacts, bank information, etc.
- Questions related to purchase order, invoice, and payment details

Standard payment terms are Net 40 days ACH from receipt of invoice. Early payment/discount options are available on the portal.

V. SCOPE OF SERVICES REQUESTED

Bidders must provide information on each of the items below as part of their Technical Proposal:

Launch Strategy: Describe Bidder's launch strategy, identify any needed start-up activities and associated timelines.

Pilot Management: Describe Bidder's approach to managing this Pilot, including ongoing coordination meetings with the Company, risk management approach, and regular reporting on Pilot progress.

Customer Awareness: Describe Bidder's proposed strategy for making eligible customers aware of the opportunity, conducting outreach to potential customers, with the understanding that the Company expects these efforts to be minimal and to leverage existing WPS/WEPCO newsletters and websites. Note the Pilot maximum participation amounts established by PSC.

Qualified Devices and OEMs: Identify qualified Devices that you propose be included in this Pilot and the reasoning behind this selection. Describe any current contracting and partnerships Bidder has in place with OEMs.

Customer Enrollment: Describe Bidder's proposed strategy for customers to enroll their thermostat in the Pilot, including any customer enrollment portals or in-app capabilities, offered by individual OEMs or by the Bidder, and any capabilities to verify customer eligibility, if available.

Platform Integration Capabilities: Detail existing API, SFTP or other processes for seamlessly enabling data sharing with third-party services, including utility systems.

Customer Privacy and Data Security: Specify standards and protocols for secure data exchange between all relevant systems. Include any relevant information as to how Bidder will protect the privacy of participating customers, including role-based access for secure operation, encryption of data, and other industry standard practices.

Customer Communications: Describe approach and capabilities for Event communications pre, post, and mid-event, with a focus on available channels for messaging.

Reporting: Describe reporting capabilities and functions to support measurement and verification of event performance, including any visualization and canned reports provided to the Company. Identify the key performance indicators tracked and how information is presented to the Company. Include sample reports, if applicable, as attachments to your response. Identify if there are any restrictions to the data that the Company will have access to, for example whether customer data is anonymized and how long it might take for data to be available to the Company.

Forecasting: Identify any forecasting capabilities included in your base price for the platform, including ability to predict load curtailed prior to an event. If there are enhanced forecasting capabilities available, please describe them.

Company Resources: Identify any resources required from the Company to successfully implement this Pilot.