

Request for Proposals (RFP)
CT Energy Efficiency Board Contractor Ombudsperson
March 12, 2026

RFP Summary

Connecticut Light and Power Company and Yankee Gas Service Company (both dba Eversource Energy), The United Illuminating Company (“UI”), Southern Connecticut Gas (“SCG”), and Connecticut Natural Gas (“CNG”), collectively “the Utilities,” are soliciting Request for Proposals on behalf of the State of Connecticut Energy Efficiency Board for a Contractor Ombudsperson for a three-year term starting January 1, 2027.

The RFP is posted on the Energize CT website under RFPs at <https://www.energizect.com/connecticut-energy-efficiency-board/rfps>. Bidders are required to send their bid proposals to EEB_Secretary@EnergizeCT.com with the subject line “EEB Contractor Ombudsperson RFP 2026.” Bids are due by May 7, 2026.

About the Energy Efficiency Board

The State of Connecticut Energy Efficiency Board (“EEB”), established by CT General Statutes Section 16-245m, is seeking a Contractor Ombudsperson to the residential Home Energy Solutions (HES) and Home Energy Solutions Income Eligible (HES-IE) contractors in the Conservation and Load Management (C&LM) Programs. The EEB oversees the ratepayer-funded C&LM programs and initiatives administered by the electric and gas utility distribution companies, and advises municipal utilities charged with implementing C&LM programs. The EEB, a seventeen-member board, includes representatives from governmental agencies, business and residential consumer groups, non-profit organizations, and the Utilities. The EEB reports annually to the Department of Energy and Environmental Protection (“DEEP”) and to the Connecticut General Assembly.

Connecticut is a leading state in energy efficiency, demand response, and load management programs – labeled “Conservation and Load Management,” or “C&LM” in state statute – in several ways. First, Connecticut C&LM programs address a wide range of policies and objectives, cover the full breadth of customer sectors and market segments, employ a wide variety of program and market strategies, and seek to achieve deep and comprehensive energy and demand savings to benefit customers and the state. Second, these ambitious objectives and extensive program efforts are pursued in the context of significant but limited funding, and with strong focus both on leveraging the ratepayer monies used to fund the programs, and on advancing market-based strategies to achieve the savings and other benefits. The combination of ambitious objectives, a wide range of programs, a strong focus on market-based strategies and leveraging, utilities that are supportive of energy efficiency and demand resources, and an engaged public stakeholder board in the form of the EEB makes Connecticut a very interesting and rewarding place to work. The [C&LM Plan](#) is supported by all Eversource electric and UI customers on their electricity bills through the Combined Public Benefits Charge; and by CNG, SCG and Eversource gas customers through a conservation charge included in their gas rates.

Background

In its [Final Determination](#) on the 2025–2027 Conservation and Load Management (C&LM) Plan, the Connecticut Department of Energy and Environmental Protection (DEEP) directed the Energy Efficiency Board (EEB) to establish a new Board consultant position to serve as an Ombudsperson for Home Energy Solutions (HES) and Home Energy Solutions–Income Eligible (HES-IE) residential program contractors.

DEEP acknowledged that residential program contractors are often occupied with serving customers during EEB and DEEP meetings and activities, which significantly limits their ability to meaningfully participate in EEB and DEEP functions. Accordingly, this role was established to address participation constraints resulting from the demands of field-based work.

The purpose of the Contractor Ombudsperson position is to improve communication, transparency, and information flow between residential program contractors, the EEB, and DEEP, while preserving existing utility–contractor relationships and established communication pathways. The Contractor Ombudsperson will serve as an impartial, neutral, and independent resource that gathers, synthesizes, and facilitates constructive dialogue, informal conflict resolution and addresses concerns related to program policies and practices. In addition, the Contractor Ombudsperson will be responsible for listening to concerns, clarifying issues, coaching and empowering individuals to navigate conflict, identifying areas of agreement and disagreement; and supporting timely resolution of issues that cannot be addressed through standard utility–contractor channels exploring both informal and formal pathways to resolution. The role is not intended to achieve consensus among residential program contractors, but rather to document differing perspectives and identify areas of agreement where feasible. This role is not intended to advocate for any one individual or entity, specific outcomes or to replace direct contractor engagement with the utilities, but rather to facilitate constructive engagement and informed decision-making in support of effective program oversight and implementation. This is a facilitative role; the ombudsperson will not have authority to impose solutions to any conflicts that arise nor have positional authority over any contractor or utility individual or participant. Trends and systemic issues should also be identified, offering opportunities for constructive change, fostering a respectful and equitable climate.

Responsibilities

The Contractor Ombudsperson shall be responsible for the following ongoing activities:

- Serve as the primary point of contact between DEEP/EEB and residential program contractors.
- Proactively solicit feedback from residential contractors regarding program updates; compile and summarize the full range of contractor perspectives received; and track, communicate, and support resolution of contractor concerns, issues, or complaints that cannot be resolved through established utility–contractor communication pathways, including serving in a mediating role when appropriate.
- Support dissemination of information to contractors regarding EEB meetings, EEB Evaluation and Residential Committee activity, voting items, requests for comment, and upcoming meetings and events.
- Provide regular updates to the EEB conveying contractor positions on programmatic issues; request agenda time, as appropriate, to present residential contractor perspectives to the EEB

or its committees; and attend in-person and virtual meetings to summarize contractor interests and relay information back to the residential contractor community.

- Assist with development of DEEP’s Contractor Technical Advisory Committee (CTAC) meeting agendas, proactively solicit agenda topic ideas from contractors, and support CTAC meeting facilitation, including responding to DEEP requests for CTAC agenda topics.
- Assist in the development of formal written and verbal comments from residential program contractors in response to requests from DEEP, the EEB, and the utilities.
- Assist with onboarding of new program contractors with respect to EEB and DEEP roles, processes, and functions related to program implementation.

Qualifications

Respondents must demonstrate the qualifications necessary to perform the responsibilities and scope of work described above, including the following:

- A minimum of five (5) years of professional experience in ombudsperson work aligned with the resources and guidelines established by the International Ombuds Association (IOA) or the United States Ombudsman Association (USOA).
- Familiarity with the Energy Efficiency Board (EEB) and Connecticut’s Conservation and Load Management (C&LM) programs as well as energy efficiency or residential contracting, public policy, mediation, legal services, or a closely related field.
- Strong interpersonal skills and established reputation within the CT Energy Efficiency contractor community
- Strong written and verbal communication skills.
- Demonstrated organizational, problem-solving, and collaboration skills, including the ability to work independently and in team settings; take ownership of processes; exercise initiative; and follow through on solutions.
- Preference for candidates located within Connecticut or with the ability to travel to in-person EEB and related meetings as needed.
- Independence from the Utilities, DEEP, and the EEB and its contractors. The candidate shall not be a current program contractor, employed by a current program contractor, in a contractual relationship with a current program contractor, or have an immediate familial relationship with a current program contractor, an employee of a program contractor, or an individual in a contractual relationship with a program contractor.

Anticipated Workload

The monthly level of effort required for the Contractor Ombudsperson is expected to vary based on C&LM program activities and interface with the contractor community. It is anticipated that the role will include a base level of effort to support ongoing communications and meeting participation; however, additional time may be required as specific instances arise.

For context, examples of past instances that would likely require increased effort have included the 2025 redesign of the Home Energy Solutions (HES) and Home Energy Solutions–Income Eligible (HES-IE) programs; 2024 budget constraints that affected contractor purchase orders; and findings from evaluation studies or C&LM Plan approvals that directly affected fieldwork practices.

It is anticipated that the role will typically require approximately 25 to 40 hours per month on average (not including travel time), with additional hours required during periods of heightened activity or issue resolution. There may be some months where less hours are required because minimal residential contractor related events occur. Respondents should identify in their proposals a base level of monthly effort as well as an on-call or flexible allocation of hours to address unanticipated or one-off issues as they arise.

First Year Scope of Work and Deliverables

The following scope of work tasks are expected to be the primary focus of the Contractor Ombudsperson during the first year of the work plan:

1. Creation of EEB Contractor Ombudsperson Charter

As part of the initial onboarding and startup process, the consultant shall develop an “EEB Contractor Ombudsperson Charter” to be adopted by the EEB. The Charter shall formally define the role’s protocols, responsibilities, scope, and limitations. The development process should include preparation of an initial review draft that issued for stakeholder comment, followed by a final version that incorporates stakeholder input and final presentation to the EEB describing the document. The Charter shall draw on relevant concepts from ombudsperson charters in other sectors¹ and shall be consistent with this RFP and applicable DEEP direction. It should also address confidentiality, ethical standards, and role independence, including how information will be handled and the extent to which Ombudsperson communications and records may be subject to Freedom of Information Act (FOIA) requirements, subpoenas, or other legal processes. This is expected to be a one-time task and is estimated to require 40-60 hours at the beginning of the contract.

2. Define Contractor Engagement, Communication, and Issue Management Framework

The consultant shall establish working relationships and regular communication methods with all HES and HES-IE residential program contractors. The consultant shall develop and document standardized processes for conveying information to contractors, as well as for soliciting, compiling, and summarizing contractor feedback, concerns, and issues. Specific information that is expected to be communicated with residential contractors includes but is not limited to evaluation study findings that impact residential programs, requests for comment that seek residential contractor input, any other meeting discussions or program changes that affect residential contractor budgets or scope of work. The consultant shall develop and maintain a tracking mechanism to log information conveyed to contractors, as well as contractor concerns, issues, and complaints raised to DEEP and the EEB, including status, escalation pathways, and resolution outcomes. A brief action plan that describes how this task will be accomplished should be submitted to the EEB/DEEP in writing during the first 1-2 months of the contract term; this is expected to be a one-time task that requires 5-10 hours. Ongoing contractor communication is estimated to require 10-15 hours per month, on average.

3. Support EEB, Committee, and CTAC Meeting Coordination and Reporting

The consultant shall provide monthly written updates to the EEB and DEEP summarizing contractor feedback, areas of agreement and disagreement, and recurring or systemic issues. The

¹ One example charter that may be reviewed is the UCONN Ombudsperson Charter: <https://ombuds.uconn.edu/uconn-ombuds-office-charter-2/>

consultant shall also support development of the Contractor Technical Advisory Committee (CTAC) meeting agendas by proactively soliciting agenda topic ideas from residential program contractors and responding to DEEP requests for CTAC agenda input. Respondents should review the [EEB's 2026 Regular Meeting Schedule](#) (also posted in calendar format on [EnergizeCT EEB meeting calendar](#)) as well as DEEP's [2026 Contractor Technical Advisory Committee Regular Meeting Schedule](#). The Contractor Ombudsperson will be expected to attend the following meetings (typical length of meeting and meetings per year shown in parenthesis):

- EEB Meetings² (2.5 hours, 12 per year)
- Residential Committee Meetings (2.5 hours, 11 per year)
- EEB Evaluation Committee Meetings (2 hours, 12 per year)
- Contractor Technical Advisory Committee Meetings (2 hours, 5 per year)
- EEB Consultant Committee Meetings (1 hour, 5 per year)
- EEB Leadership Calls (1 hour, 24 per year)
- Public Input Sessions (1 hour, 3 per year)

Additional meeting participation may be requested at the EEB/DEEP's request. Proposals should contain the travel time to the extent that the candidate plans to bill travel time and mileage reimbursement to the contract. The amount of time spent participating in EEB and Committee meetings (not including travel) is estimated at 10-15 hours per month, on average. Associated reporting, presentation preparation, and agenda development is estimated at 5-10 hours per month, on average.

In developing proposed hours and budgets, respondents should also account for the preparation of annual workplans, as described in the "Payment Procedures" section, and for onboarding and training of a subsequent Contractor Ombudsperson, as described in the "Proposal Timeline and Requirements" section, where applicable.

All task hours identified in the Scope of Work and Deliverables section are provided for general guidance in support of respondents' proposals. Respondents should rely on their own experience and judgment in estimating the level of effort required and should propose the amount of time they believe is necessary to successfully complete the scope described.

Payment Procedures

The selected applicant will be expected to develop annual workplans describing anticipated work tasks, priorities, and budget. This workplan development task is expected to take approximately 5-10 hours per year. The selected applicant will be expected to budget their time to keep within the workplan budget and will require the approval of the EEB prior to embarking on work that is outside of the scope of the workplan. The selected applicant will report directly and solely to the EEB. The applicant shall submit invoices, using a template provided by the EEB, on a monthly or quarterly basis to the EEB Consultant Committee. Invoices should include a summary of hours worked and supporting documentation for any allowed expenses incurred during the month. A separate invoice reflecting each utility's share will be prepared for the utility's Accounts Payable Department and supplied to the utilities' representatives. The selected

² EEB Meetings include 11 regular monthly meetings and 1 Annual Planning Meeting.

applicant will provide a brief written summary of activities to the Consultant Committee as part of the invoicing procedure.

Conflict of Interest Statement

Applicants must not have any real or perceived conflicts of interest with Eversource Energy, Avangrid (United Illuminating, Connecticut Natural Gas, or Southern Connecticut Gas), any vendors that provide energy efficiency services in the C&LM programs, any [evaluation study contractors or EEB Consultants](#), or any [EEB members](#). Along with the proposal submission, applicants must submit the “[Organization Conflict of Interest Disclosure Statement](#)” which requests disclosure if any conflicting relationships exist. Conflicts of interest shall be evaluated by the EEB and the Companies on a case-by-case basis.

Proposal Requirements and Timeline

This RFP does not commit the EEB to award a contract, pay any costs incurred in the preparation of a proposal in response to the RFP, or to procure or contract for services. The EEB reserves the right to accept or reject any or all proposals received because of this request, to negotiate with any or all qualified Contractors, or to cancel this RFP in part or in its entirety, if it is in their best interests to do so.

The EEB reserves the right, at its sole discretion, to reject any or all proposals, to waive any minor irregularities or informalities in a proposal, and to enter into any agreement deemed by the EEB to be in the best interest of the ratepayers of the State of Connecticut. The EEB reserves the right to discuss with the selected applicant any terms and conditions, including financial issues, for any proposed project.

The EEB’s processes are subject to rules and regulations of the [Freedom of Information Act \(FOIA\)](#). Bidders should be aware that their proposals will be subject to public disclosure unless they submit a redacted version with a clear justification for why the redacted sections are exempt from FOIA.

Bidders should review the [EEB’s Operating Procedures](#) before submitting a proposal. The agreement terms and conditions for each Utility will be posted on the [RFP page of the EEB website](#). RFP responses should include either acceptance of the terms and conditions, or a written response explaining any requested exceptions. Exceptions may not be accommodated. Applicants should submit a proposal including: qualifications, prior experience, references (3 minimum), a response to the responsibilities detailed above, and a proposed budget with hourly and total compensation, estimated expenses, estimated administrative and support hours, overhead and/or management costs (if applicable), and 6.35% business service tax on labor (only for Connecticut residents who are consultants). Please limit proposals to 5 pages (the page limit does not include supporting reference materials such as resumes, project experience, budget details, references, etc.).

The start date for the Contractor Ombudsperson role is approximately January 1, 2027 but may be altered based on time required to complete the initial contracting phase. Proposals should

include scopes of work for January 1, 2027 through December 31, 2029, with the understanding that the position will be evaluated annually and the EEB will have the option to renew on an annual basis.

Proposals should include detailed pricing information for the periods of:

- January 1, 2027 – December 31, 2027 (12 months)
- January 1, 2028 – December 31, 2028 (12 months)
- January 1, 2029 – December 31, 2029 (12 months)

Note: The final year of the RFP term should include a scope of work and budget for onboarding and training a new Contractor Ombudsperson between November 1, 2029 and December 31, 2029, to be utilized if a different consultant is selected through the subsequent three-year RFP process.

During the first year, the position shall be viewed as a pilot offering. The EEB and DEEP, informed by feedback from the residential contractor community, will determine on an annual basis whether to continue, modify, or discontinue the role.

RFP Timeline

The RFP Timeline is as follows:

Publication of RFP:	March 12, 2026
Intent to bid and questions on RFP due:	April 10, 2026
Answers to questions provided:	April 17, 2026
Proposals due:	May 7, 2026 (5:00 pm, EST)
EEB Interviews conducted:	May 18-22, 2026
Selection decision:	July 1, 2026
EEB Board Vote	August 12, 2026, EEB Meeting
Expected start date:	January 1, 2027

All intent to bid, questions, proposals, and other correspondence regarding this RFP should be sent in writing to EEB_Secretary@EnergizeCT.com with “CT EEB Contractor Ombudsperson RFP 2026” in the Subject Line. The RFP will be posted and available to view on the RFP page of the Energize CT website at: www.energizect.com/connecticut-energy-efficiency-board/rfps.