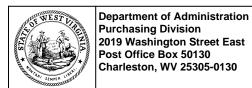


2019 Washington Street, East Charleston, WV 25305 Telephone: 304-558-2306 General Fax: 304-558-6026

Bid Fax: 304-558-3970

The following documentation is an electronically-submitted vendor response to an advertised solicitation from the *West Virginia Purchasing Bulletin* within the Vendor Self-Service portal at *wvOASIS.gov*. As part of the State of West Virginia's procurement process, and to maintain the transparency of the bid-opening process, this documentation submitted online is publicly posted by the West Virginia Purchasing Division at *WVPurchasing.gov* with any other vendor responses to this solicitation submitted to the Purchasing Division in hard copy format.





State of West Virginia **Solicitation Response**

Proc Folder: 1813640

Solicitation Description: Consultant for WV Public Service Commission

Proc Type: Central Master Agreement

Solicitation Closes Solicitation Response Version 2025-11-05 13:30 SR 0926 ESR11042500000002933 1

VENDOR

VS0000010638 DAVID J ELLIS

Solicitation Number: CRFQ 0926 PSC2600000003

Total Bid: 108900 **Response Date:** Response Time: 2025-11-04 13:10:15

Comments:

FOR INFORMATION CONTACT THE BUYER

Larry D McDonnell 304-558-2063 larry.d.mcdonnell@wv.gov

Vendor

FEIN# DATE Signature X

All offers subject to all terms and conditions contained in this solicitation

FORM ID: WV-PRC-SR-001 2020/05 Date Printed: Nov 5, 2025 Page: 1

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	Consultant - Hourly Fee	900.00000	HOUR	121.000000	108900.00

Comm Code	Manufacturer	Specification	Model #	
81101516				

Commodity Line Comments: Advice will be delivered timely as requested by Commission.

Extended Description:

Provide hourly rate based on the estimated number of 900 work hours. See attached documentation for further details.

Date Printed: Nov 5, 2025 FORM ID: WV-PRC-SR-001 2020/05 Page: 2

REQUEST FOR QUOTATION Consultant for WV Public Service Commission CRFQ PSC26*03

Submitted by David J. Ellis, (hereinafter "Vendor")

Requirement: 3. QUALIFICATIONS:

Vendor Response: Vendor is qualified based on substitution of work experience for required academic training. Vendor has worked as a statistician, auditor, rate analyst and Division Director at the Public Service Commission of West Virginia from 1963 to 2004 and from 2009 until 2017. This is total direct experience of 50 years. During that period, vendor worked directly conducting audits of many water, sewer, telephone, natural gas, electric and motor carrier public utilities. Those audits included full charge of audits of major utilities including Appalachian Power Company, Wheeling Power Company Monongahela Power Company, Columbia Gas of West Virginia, General Telephone Company, and many large Municipal and PSD Water and Sewer utilities. Vendor became director of the Commission's Division of Accounts, Finance and rates in 1977 and worked in a supervisory and administrative capacity for twenty-seven years until 2004. Vendor was a member of the National Association of Regulatory Commissions (NARUC) staff subcommittees on electricity, water and accounting. Vendor has testified before the Federal Energy regulatory Commission and participated in electric utility transmission studies performed on behalf of the national governors' Association. Vendor served as an instructor at the NARUC eastern and Western Rate Schools, teaching regulatory rate making and accounting, regulatory tax accounting, and cost of capital techniques. Vendor worked as Chief of Staff for a Commissioner of the United States International Trade Commission from 2004 until 2009. In that position, in addition to supervisory and administrative duties, Vendor prepared analyses of financial data of foreign businesses selling goods in the United States and analyses of the impact of foreign imports on the operations and profits of domestic industries. Vendor returned to the PSC in 2009 and served as Director of Quality Assurance and Advisor to the Commission.

Requirement: 3.3. Resume:

Vendor Response: Vendor submits and refers to the description of qualifications above (Requirement 3) for the curriculum vitae or detailed resume as required.

4. MANDATORY REQUIREMENTS:

Requirement: 4.1.1.1 Vendor will be required to evaluate complex case issues that must be processed by the Agency.

Vendor Response: Vendor has evaluated complex issues in rate and certificate cases before the PSC for fifty years. Vendor has testified regarding complex regulatory accounting and ratemaking issues before the PSC and the Federal Energy Regulatory Agency (FERC) (formerly Federal Power Commission). Vendor has developed training documents and taught students on complex regulatory issues at the rate schools sponsored by the National Association of Regulatory Utility Commissioners (NARUC).

Requirement: 4.1.1.2 Vendor must have knowledge of Agency policies, rules and regulations as well as case history for all utility cases processed by the Agency. Cases may include gas, electric, water, sewer, telephone and motor carrier utilities.

Vendor response: Vendor has experience and direct knowledge of activities and Commission decisions in gas, electric, water, sewer, telephone and motor carrier cases. Vendor can research cases going back over fifty years quickly and efficiently due to a vast knowledge and experience relating to issues and decision in prior cases. Much of this experience comes from direct involvement as a witness, or administration and management of staff members assigned to prior cases. Vendor has knowledge of rules and regulations due to fifty years of working within those rules and regulations. Vendor has also been involved in drafting the PSC rules and regulations and advising the Commission regarding comments from interested parties about proposed rule changes.

Requirement: 4.1.1.3 Vendor will be asked to prepare reports on internal auditing, process improvement and quality control activities as well as analyzing and preparing factual case summaries with respect to financial and economic impacts of cases pending before the Agency. Working knowledge of case history, going back as far as 25 years, will be required in order to be familiar with current and past cases, to cite policy and decisions on related issues in prior cases, and to efficiently check Agency precedents in those cases.

Vendor Response: Vendor refers to response to 4.1.1.2, above. Vendor's experience surpasses the 25 year criteria by more than 25 years. Vendor has prepared detailed reports on many regulatory matters, including rate setting, cost of capital, depreciation practices, transmission of electricity issues, complex electricity generation issues and variable costs of generation. Vendor participated as lead staff member on major gas, and electric rate case since 1970. Vendor in his capacity as Division Director or consultant to the Commission has been directly involved in every major rate, certificate, and general investigation case coming before the Commission since 1977. With regard to process improvement and quality assurance, Vendor was employed as Director of Quality

Assurance at the PSC from 2009 until 2017 and has continued to work on process improvement and quality assurance as a Contracted advisor to the Commission.

Requirement: 4.1.1.4 Vendor must have knowledge of theories, principles and practices in the area of assignment to provide expert consultation and policy recommendation to the Agency.

Vendor Response: Vendor has written and taught regulatory theories, principals and practices in rate schools sponsored by NARUC and Michigan State University. Vendor has trained Commission accounting and rate personnel. Vendor formulated PSC Staff training manuals, audit programs and procedures, and formatted rate case reports now referred to as Commission Rule 42 Financial reports. Vendor has appeared as an expert witness on regulatory accounting and rate setting before the Commission and the FERC. Vendor participated on the NARUC Staff Subcommittee on Energy for over 25 years and on the NARUC Staff Subcommittee on Accounting.

Requirement: 4.1.1.5 Vendor must be able to compare and contrast current recommendations on current issues to similar issues that have come before the Agency in the past.

Vendor Response: Vendor has direct knowledge of issues that have been adjudicated by the Commission for over sixty years. Vendor has experienced the changes that have taken place in West Virginia regulatory policies and federal regulatory policies since 1963. Therefore, vendor can directly explain the circumstances surrounding past decisions and current circumstances both to compare and contrast the current versus past circumstances.

Requirement: 4.1.1.6 Vendor must have a working knowledge of Agency Staff policy, and an understanding of historic policies and positions taken by Agency Staff and other parties in various cases or other forums.

Vendor Response: Vendor's knowledge is directly related to the Public Service Commission of West Virginia as discussed above. Vendor is not only familiar with Commission staff policies and procedures, but actually developed many of those policies and procedures during a tenure of over forty years as a Division director. Vendor has advised Staff on the regulatory nuances of unique case issues and interpretations of positions taken by other parties in cases.

Requirement: 4.1.1.7 Vendor must have a working knowledge of issues pending or decided by FERC, the FCC, and regional regulatory groups, including PJM and OPSI that evaluate energy policy, regional electric market issues, regional transmission issues, wholesale electric and gas market issues, telecommunications policies and other utility issues that are of vital interest to West Virginia.

Vendor Response: Vendor has been directly involved in FERC and FCC cases, including rulemaking. Vendor has participated as staff representative of the WV Commission on the Organization of PJM States (OPSI) since its inception over twenty years ago, Vendor confers regularly with PJM personnel to advise PJM of the position and concerns of West Virginia as a representative of OPSI and a representative of the WV Commission. Vendor has prepared declarations and White Papers regarding regional electricity transmission and regional energy and capacity markets. Vendor has participated in FERC settlement procedures establishing complex settlement provisions in matters related to the PJM energy and capacity markets. Vendor was directly involved in telephone rate cases prior to deregulation of the telephone markets and continued to be involved after deregulation in the development if interconnection agreements and certification of competitive local exchange carriers.

Requirement: 4.1.1.8 Vendor will be required to attend weekly Agency decision meetings and assist the Agency in reaching decisions on cases and advising on policy issues.

Vendor response: Vendor has participated in Commission decision conferences for over fifty years. Vendor is experienced in explaining and presenting all sides of contested issues to the Commission and assisting the Commission in arriving at fair and balanced decisions. Vendor is experienced in combining issue specific accounting and ratemaking decisions with policy considerations as part of his provision of advice to the Commission.

Requirement: 4.1.1.9 Vendor must have an understanding and be prepared to discuss and advise the Agency in regard to telecommunications issues such as Enhanced 9-1-1 services, Telephone Relay Services in West Virginia, FCC policies, Federal Universal Service Fund and West Virginia's Tel-Assistance program.

Vendor response: Vendor has more than just an understanding of telecommunication policies and issues. Vendor has participated in numerous telephone rate cases before the Commission and has helped develop state rules that comply with federal rules dealing with cost allocation and deregulated telephone access service. Vendor developed the first and subsequent Telephone Relay Service bidding and contracting rules for the Commission. Vendor has acted as a mediator in pole sharing disputes between major electric and telephone companies and crafted settlements covering complex pole sharing agreements between the pole owners.

Requirement: 4.1.1.10 Vendor must be prepared to discuss and advise the Agency in regard to Motor Carrier issues in cases pending before the Agency including cases related to rates and practices of Solid Waste Facilities and regulated Motor Carriers of goods and passengers.

Vendor response: Vendor has audited major motor carrier operations and appeared as a witness in motor carrier cases. Vendor has advised the Commission on motor carrier rate and certificate issues in his capacities as a Division Director and as a consultant and advisor to the Commission. Vendor has developed cost allocation models to determine costs of providing various services both regulated and unregulated by motor carriers. Vendor has advised the Commission and testified in federal court on the complex issues regarding the interfacing and overlap of regulated, monopoly motor carrier service under state law with deregulated, competitive motor carrier service under federal law.

Requirement: 4.1.1.11 Reviewing certain cases before the Agency will require research into operational issues pertaining to proposed water and sewer projects and the WV Infrastructure & Jobs Development Council.

Vendor Response: Vendor has become familiar with the operations of water and sewer utilities during his tenure as an auditor and rate analyst as well as during his tenure as a Division Director at the Public Service Commission. His knowledge includes knowledge of the workings of water and sewer utility operations as well as financing issues through the WVIJDC, other public funding agencies and private financing.

4.1.12 Specifications

Vendor is familiar with the billing and timekeeping requirements of paragraphs 4.1.12.1,2,and 3 of the Request for Quotation.. Vendor agrees to comply with those requirements as well as all other requirements as set forth in paragraphs 5,6,7,8,9,10 and 11 of the Request for Quotation.



October 31, 2025

West Virginia Purchasing Division 2019 WASHINGTON ST E CHARLESTON WV 25305

Account Information:		Contact Us	
Policy Holder Details :	David Ellis	Need Help?	
		Chat online or call us at	
		(866) 467-8730.	
		We're here Monday - Friday.	

Enclosed please find a Certificate Of Insurance for the above referenced Policyholder. Please contact us if you have any questions or concerns.

Sincerely,

Your Hartford Service Team



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 10/31/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

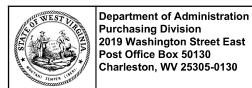
IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATIONIS WAIVED,

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	DUCER			CONTACT NAME:	.(0)-			
CAF	PITAL INSURANCE GROUP LLC			PHONE (204)	PHONE (304) 606-2969 FAX (304) 984-6720			
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INSU	RED			INSURER B:				
DAV	/ID ELLIS			INSURER C :				
	HUNTERS RIDGE RD			INSURER D :				
CHA	ARLESTON WV 25314-2408			INSURER E :				
				INSURER F :				
CO	VERAGES C	ERTIF	ICATE	NUMBER:		REVIS	ION NUMBER:	
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LTR	TYPE OF INSURANCE	INSR	WVD	POLICY NUMBER	(MM/DD/YYYY)	(MM/DD/Y YYY)	LIMITS	
	COMMERCIAL GENERAL LIABILITY						EACH OCCURRENCE	\$1,000,000
	CLAIMS-MADE X OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	\$1,000,000
	X General Liability						MED EXP (Any one person)	\$10,000
Α		X		40 SBA AN6NH9	10/07/2025	10/07/2026	PERSONAL & ADV INJURY	\$1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	\$2,000,000
	X POLICY PRO- JECT LOC						PRODUCTS - COMP/OP AGG	\$2,000,000
	AUTOMOBILE LIABILITY						COMBINED SINGLE LIMIT	\$1,000,000
	ANY AUTO						(Ea accident) BODILY INJURY (Per person)	
Α	ALL OWNED SCHEDULED			40 SBA AN6NH9	10/07/2025	10/07/2026	BODILY INJURY (Per accident)	
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	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - POLICY LIMIT	
Α	Employment Practices Liability Insurance			40 SBA AN6NH9	10/07/2025	10/07/2026	Each Claim Limit Annual Aggregate Limit	\$25,000 \$25,000
DESC	CRIPTION OF OPERATIONS / LOCATIONS / V	EHICLE	S (ACOR	D 101, Additional Remarks S	schedule, may be atta	ched if more spac	e is required)	
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	t Virginia Purchasing Division						E DESCRIBED POLICIES	
	9 WASHINGTON ST E				BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.			

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CHARLESTON WV 25305

AUTHORIZED REPRESENTATIVE



State of West Virginia Centralized Request for Quote Consulting

Proc Folder:	1813640		Reason for Modification:
Doc Description:	Consultant for WV Public Se	ervice Commission	
Proc Type:	Central Master Agreement		
Date Issued	Solicitation Closes	Solicitation No	Version
2025-10-22	2025-11-05 13:30	CRFQ 0926 PSC2600000003	1

BID RECEIVING LOCATION

BID CLERK

DEPARTMENT OF ADMINISTRATION

PURCHASING DIVISION

2019 WASHINGTON ST E

CHARLESTON WV 25305

US

VENDOR

Vendor Customer Code:

Vendor Name: David Ellis

Address:

Street: 301 Hunters Ridge Road

City: Charleston

State: West Virginia Country: United States Zip: 25314

Principal Contact: David Ellis

Vendor Contact Phone: 304-382-3836 Extension:

FOR INFORMATION CONTACT THE BUYER

Larry D McDonnell 304-558-2063

larry.d.mcdonnell@wv.gov

Vendor
Signature X Laid & Ellis ##W# SSN 232-68-9304 DATE 11/04/2025

All offers subject to all terms and conditions contained in this solicitation

 Date Printed:
 Oct 22, 2025
 Page: 1
 FORM ID: WV-PRC-CRFQ-002 2020/05

ADDITIONAL INFORMATION

The West Virginia Purchasing Division is soliciting bids on behalf of the WV Public Service Commission to establish an open-end contract for a consultant to assist the PSC with a wide variety of issues; including utility finance, utility accounting, revenue requirements, cost of service, rate design, and regional and federal utility issues, per the attached bid requirements, specifications, project plans and terms and conditions as attached hereto.

Questions regarding the solicitation must be submitted in writing to Larry.D.McDonnell@wv.gov prior to the question period deadline

READ ALL TERMS AND CONDITIONS AND SPECIFICATIONS IN ITS ENTIREITY - SEE ATTACHED FILE NAMED: CRFQ PSC26*03 - SOLICITATION DOCUMENTATION

INVOICE TO		SHIP TO	
PUBLIC SERVICE COMMISSION		PUBLIC SERVICE COMMISSION	
201 BROOKS ST		201 BROOKS ST	
CHARLESTON US	WV	CHARLESTON US	WV

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Consultant - Hourly Fee	900.00000	HOUR	\$121	\$108,900

Comm Code	Manufacturer	Specification	Model #
81101516			

Extended Description:

Provide hourly rate based on the estimated number of 900 work hours.

See attached documentation for further details.

SCHEDULE OF EVENTS

<u>Line</u>	<u>Event</u>	Event Date
1	Vendor questions due by 2:00PM EST/EDT	2025-10-29

Date Printed: Oct 22, 2025 Page: 2 FORM ID: WV-PRC-CRFQ-002 2020/05

DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

(Printed Name and Title) David Ellis Owner	
(Address) _ 301 Hunters Ridge Road	
(Phone Number) / (Fax Number)	
(email address)dellispsc@gmail.com	

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that: I have reviewed this Solicitation/Contract in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation/Contract for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that this bid or offer was made without prior understanding, agreement, or connection with any entity submitting a bid or offer for the same material, supplies, equipment or services; that this bid or offer is in all respects fair and without collusion or fraud; that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; that I am authorized by the Vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on Vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

By signing below, I further certify that I understand this Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law; and that pursuant to W. Va. Code 5A-3-63, the entity entering into this contract is prohibited from engaging in a boycott against Israel.

David Ellis
(Company) David & Ellis
(Signature of Authorized Representative)
David Ellis Owner 11/4/2025
(Printed Name and Title of Authorized Representative) (Date) 304-3382-3836
(Phone Number) (Fax Number) dellispsc@gmail.com

(Email Address)