Organization of MISO States - REQUEST FOR PROPOSALS

Distributed Energy Resources and Order No. 2222 Technical Support

October 13, 2026

Dear Qualified Consultants or Organizations:

The Organization of MISO States, Inc. (OMS) is seeking proposals from qualified firms or organizations for technical and policy support related to distributed energy resources (DERs), DER data collection, and implementation of FERC Order No. 2222 in the Midcontinent Independent System Operator (MISO) region.

The engagement is anticipated to extend up through December 2027, with the potential for additional support as MISO approaches full implementation of Order No. 2222.

OMS was established in 2003 to represent the collective interests of state and local utility regulators of electric utilities operating in the MISO region. The primary users of work produced under this engagement will be OMS staff, the OMS Board of Directors, the OMS DER Work Group, and technical staff at OMS member agencies.

OMS and its members have been preparing for Order No. 2222 implementation for several years. This work has highlighted the importance of coordination among MISO, states, utilities, DER aggregators, distribution system operators, and other entities, particularly with respect to DER registration, interoperability, operational coordination, and data and information exchange.

While MISO is developing the wholesale market systems and processes necessary for Order No. 2222 implementation, significant implementation responsibilities reside at the state and retail level. OMS seeks assistance developing a coordinated framework that can reduce duplicative effort, identify best practices, and facilitate interoperability between wholesale and retail systems while preserving the ability of each state to determine the appropriate approach within its jurisdiction.

Scope of Work

OMS anticipates that the selected consultant will provide support in the following areas:

1. OMS DER Survey and DER Data Collection

Review OMS's existing DER Survey and recommend improvements to its structure, questions, data collection methodology, and processing.

Specific work may include:

- Review existing OMS DER Survey questions, responses, collection methods, and identified data gaps.
- Recommend improvements to increase consistency, usability, and comparability of DER information across the MISO footprint.
- Evaluate how the OMS DER Survey should interact with or complement MISO's DER data collection efforts and other available DER datasets.
- Evaluate potential alignment with DER registry concepts and retail-level DER data collection processes.
- Identify relevant work being conducted by MISO, NAESB, NERC, NARUC, utilities, states, and other organizations related to DER data collection.
- Identify appropriate use cases for DER data collected by OMS, states, utilities, and MISO.
- Recommend usefulness of an ongoing OMS DER data collection framework, including the appropriate roles of OMS, MISO, states, and utilities.

2. Order No. 2222 Implementation Framework

Assist OMS in developing a coordinated framework for state and retail implementation activities necessary to support MISO's implementation of Order No. 2222.

Specific work may include:

- Map MISO's Order No. 2222 implementation processes against corresponding state, utility, aggregator, and distribution-system responsibilities.
- Identify areas in which additional state or retail processes, rules, systems, or decisions may be necessary.
- Evaluate how MISO's tools and procedures will need to interact with retail and distribution-level tools and procedures.
- Identify interoperability requirements and options for coordinated wholesale/retail data exchange.
- Evaluate DER registration and enrollment processes, including potential interaction with DER registry concepts.
- Evaluate operational coordination, communications, telemetry, data validation, and information-sharing requirements.
- Identify areas where greater consistency among states could reduce implementation costs or complexity while preserving state jurisdiction and flexibility.
- Review relevant approaches, standards, and best practices being developed or implemented by other RTOs/ISOs, states, utilities, NAESB, NERC, NARUC, and other organizations.
- Incorporate and further develop the issues identified in OMS's RERRA Checklist.
- Identify unresolved implementation gaps and the entity or entities best positioned to address them.

The purpose of this work is not to prescribe a single regulatory approach for OMS member states, but to develop neutral options, best practices, and common frameworks that individual states may use, modify, or decline as appropriate within their jurisdictions.

3. State Implementation Pathways and Best Practices

Based on the work above, assist OMS in translating technical and policy issues into practical implementation options for OMS member states.

This work may include:

- Development of model processes, checklists, decision trees, implementation pathways, or other tools for state regulators.
- Identification of decisions states may need to make before MISO's full Order No. 2222 implementation.
- Identification of actions that may be required by utilities or distribution system operators.
- Identification of opportunities for coordinated or common regional approaches.
- Development of neutral options where multiple reasonable regulatory or technical approaches exist.
- Identification of sequencing, dependencies, and recommended timing for implementation activities.
- Recommendations for continued OMS, MISO, state, utility, or stakeholder work through implementation.

4. Ongoing Technical Support

The selected consultant may also be asked to provide ongoing technical support to OMS staff and members, including:

- Participation in OMS DER Work Group meetings and relevant MISO stakeholder meetings.
- Regular consultation with OMS staff and member agencies.
- Review and interpretation of MISO proposals, technical materials, procedures, and implementation plans.
- Technical review of relevant standards, reports, and proposals from other organizations.
- Development of written technical memoranda, issue summaries, recommendations, and implementation materials.
- Presentations to the OMS DER Work Group, OMS Board of Directors, and other OMS committees or working groups, as needed.

Anticipated Deliverables

OMS expects the engagement to produce, at minimum:

1. Recommendations for improvements to the OMS DER Survey and DER data collection framework.
2. A mapping of MISO, state, utility, aggregator, and other relevant responsibilities associated with Order No. 2222 implementation.
3. Identification of key interoperability and wholesale/retail data exchange requirements and implementation options.
4. A state-facing Order No. 2222 implementation framework or roadmap, incorporating the OMS RERRA Checklist and identifying actions, decision points, dependencies, and responsible entities.
5. Neutral best-practice recommendations and implementation pathways that individual OMS member states may use or adapt.
6. Identification of remaining gaps and recommended items that OMS work through MISO's full implementation of Order No. 2222.
7. Presentations and ongoing technical consultation with OMS staff and members, as needed.

Proposal Requirements

All proposals must include the following:

- Evidence of the firm's qualifications to provide the services described above.
- A description of relevant experience with DERs, distribution systems, DER aggregation, Order No. 2222, RTO/ISO markets, state utility regulation, interoperability, and/or DER data systems.
- Examples of relevant reports, analyses, or other work products.
- A description of the firm's proposed approach to the scope of work.
- Identification of proposed deliverables and an anticipated schedule.
- Names and CVs/resumes of individuals who would be involved in the work and a description of each individual's anticipated role.
- Billing rates for all individuals proposed for the engagement and an estimated total or not-to-exceed cost for the proposed scope.
- Disclosure of current clients located within the MISO region and any actual or potential conflicts of interest.
- Identification of any information, participation, or resources the consultant would require from OMS, MISO, OMS member agencies, utilities, or other stakeholders.
- Any proposed modifications to the scope that the firm believes would improve the usefulness or efficiency of the engagement.

OMS is particularly interested in proposals demonstrating an ability to translate complex technical, wholesale-market, distribution-system, and regulatory issues into practical materials that can be used by state utility regulators.

OMS has a limited budget for this work, may use multiple consultants for different segments, and will consider partnerships or collaborations as appropriate.

Any additional information required to prepare a proposal may be obtained by contacting Tricia DeBleeckere via email at tricia@misostates.org or by phone at 612-270-3086.

Proposals must be submitted by October 30, 2026. Electronic proposals may be submitted to Tricia DeBleeckere via email at tricia@misostates.org.

The OMS Executive Director will review all proposals and make a recommendation to the OMS Executive Committee. The OMS Executive Committee anticipates selecting a consultant no later than December 1, 2026.

Thank you for considering our request.

Sincerely,

Tricia DeBleeckere
Executive Director
Organization of MISO States, Inc.