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**REQUEST FOR PROPOSALS  
2023 Regional Conservation Progress Report  
January 23, 2024**

**I. Contracting Organizations**

The Northwest Power and Conservation Council's (Council) Regional Technical Forum (RTF) is issuing this Request for Proposals.

**A. The Council and its Activities**

The Council is an interstate compact agency formed in 1981 by the states of Idaho, Montana, Oregon, and Washington as authorized in 1980 by Congress in the Pacific Northwest Electric Power Planning and Conservation Act, 16 U.S.C. §839, et seq. The Council is composed of eight Council members, two appointed by the governor of each of the four states. Congress charged the Council with developing two major planning documents:

- A program to protect, mitigate and enhance fish and wildlife affected by the development, operation, and management of the hydroelectric facilities located on the Columbia River or its tributaries, and
- A regional power and conservation plan to assure the Pacific Northwest an adequate, efficient, economical and reliable power supply.

Congress also charged the Council with informing the Pacific Northwest public of major regional power issues and insuring widespread public involvement in the formulation of its regional power plan and fish and wildlife program.

**B. The RTF**

The RTF is a chartered advisory committee to the Council. It was formed at the request of Congress to:

- Develop standardized protocols for verification and evaluation of energy savings
- Track regional progress toward the achievement of the region's conservation and renewable resource goals
- Provide feedback and suggestions for improving the effectiveness of conservation and renewable resource development programs in the region
- Conduct periodic reviews of the region's progress toward meeting its conservation and renewable resource goals

## II. Scope of Work

The Regional Technical Forum (RTF) is seeking a contractor to complete data collection and analysis for its annual [Regional Conservation Progress \(RCP\) Report](#). Per its Charter, the RTF is tasked with “tracking regional progress toward the achievement of the region's conservation targets by collecting and reporting on regional research findings and energy savings annually.” Thus, every year, the RTF conducts a survey of the region’s utilities, the Northwest Energy Efficiency Alliance (NEEA), the Energy Trust of Oregon, and others to gather information on energy savings and expenditures. This data collection and analysis will be compiled into the RTF’s annual RCP Report and will inform the Council on the region’s progress against the 2021 Power Plan conservation program and target.

The RTF anticipates the following tasks:

### **Task 1. Project Kick-Off**

Contractor will schedule and host a project kick off meeting within two weeks of contract execution. Council staff and the contractor will discuss and identify potential changes to the workbook or data collection. Council staff and the contractor will also review and confirm project timelines for accomplishing Tasks 2-6.

### **Task 2a. Updates of Survey Tool/Data Collection Templates**

Contractor will update data collection templates/survey tools: one to be sent to the Bonneville Power Administration and the second to be sent to the region’s independently operated utilities (IOUs), Mid-Columbia utilities (Mid-Cs), the Energy Trust of Oregon, the Northwest Energy Efficiency Alliance, and the Bonneville’s largest Customer Utilities. Contractor will start with previous years’ templates and refine as necessary to address new data needs and incorporate lessons learned.

The templates/survey tools should aim to collect detailed measure-level energy savings data and total expenditures for 2023. This measure-level granularity will enable the Council to understand the types of conservation being acquired relative to the 2021 Power Plan target. The RTF is also seeking information on other market savings, including codes and standards, and any data forecasts for energy efficiency in 2024-2025. All of these entities organize and maintain their program data differently, so the data collection template should provide clarity around data requested, while allowing flexibility for each entity. The data collection approach may also require survey or other follow-up outside of the data collection tool itself to fully understand both the quantitative and qualitative information being collected.

Anticipated Deliverable: Final data collection template(s)

Anticipated Task Completion Date: Week of March 25, 2024

### **Task 2b: Development of Data Collection Plan**

Contractor will develop a data collection plan. The RTF anticipates collecting data from Bonneville Power Administration, Bonneville Customer Utilities, Energy Trust of Oregon, Investor-Owned Utilities, Mid-Columbia Utilities, Norwest Energy Efficiency Alliance, State/Local Groups, and Public Filings and the data collection plan will need to afford flexibility for working with each entity's different needs for providing data.

Anticipated Deliverable: Final data collection plan

Anticipated Task Completion Date: Week of March 25, 2024

### **Task 3: Data Collection and Coordination**

Contractor will work with staff to request data from all entities using the data collection template developed in Task 2a and following the data collection plan defined in Task 2b. Data collection is anticipated to start in early April 2024 to allow two full months for response. The Contractor should anticipate back and forth correspondence with the responding entities to ensure that the data provided are complete and understood, in advance of Task 4. This includes being responsive to reporting entities to ensure that they fully understand the data request. This may also include follow-ups with entities to ensure timeliness of reporting. The Contractor is responsible for bringing any potential concerns (including non-responsiveness issues or data gaps/discrepancies in data) to the attention of the Project Manager in a timely manner to allow for appropriate follow-up, as necessary. In addition to the initial data request, Contractor will support staff with additional follow up to Bonneville's customers participating in self-funding to confirm data provided by BPA and request expenditures and savings forecasts.

Responders submitting proposals should include information on how the timeline will be maintained and issues will be resolved.

Anticipated Deliverable: Data collected from all entities

Anticipated Task Completion Date: Early-June 2023

### **Task 4: Data Mapping, Cleaning, Aggregation and Analysis**

Once the data from the region's utilities have been received and reviewed by Contractor for completeness, Contractor will clean and aggregate data for development of a draft RCP Workbook. Once data are cleaned, Contractor should conduct analysis as directed by the Project Manager.

Responders submitting proposals should include proposed plans for data cleaning, mapping, and aggregation to meet the needs of Task 4 as described.

Responders submitting proposals should also look at the 2022 RCP Workbook<sup>1</sup> for an example of the types of analysis that might be required.

Anticipated Deliverable: Draft workbook

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<sup>1</sup> This can be found on the RTF website at: <https://rtf.nwcouncil.org/about-rtf/conservation-achievements>.

Anticipated Task Completion Date: Week of June 24, 2024

#### **Task 5. Finalization of Measure Workbook**

Contractor will finalize the workbook. This will require back and forth with the Project Manager and Council staff to review the materials, address any errors, and identify key tables and graphs to highlight within the workbook.

Anticipated Deliverables: Final RCP Workbook and memo identifying any changes

Anticipated Task Completion Date: August 2, 2024

#### **Task 6. Project Wrap Up**

Prior to completion of the project, Contractor should provide all data to the Project Manager, along with a memo summarizing the process, analysis, data gaps, results, and suggestions for future year improvements. This memo may be delivered in a final meeting between contractors and staff. This should include the raw data from the reporting entities, along with the cleaned, aggregated data. The close out memo should include details about each task in enough detail to provide a blueprint for future year's analysis.

Anticipated Deliverables: Complete data set and Final Close-Out Memo

Anticipated Task Completion Date: August 30, 2023

### **III. Budget Expectations and Timeline**

For planning purposes, the RTF 2024 work plan estimates \$60,200 for this effort. The RTF reserves the right to revise the budget and timeline. Proposals should be based on time and materials, with a not-to-exceed limit.

### **IV. How to Submit a Proposal**

Proposals should be submitted to the RTF in electronic form by **February 23, 2023**.

Proposals should be emailed to:  
Northwest Power and Conservation Council  
Annika Roberts  
[rtfadmin@nwcouncil.org](mailto:rtfadmin@nwcouncil.org)

Proposals shall include the following elements:

- Contact information and brief description of the firm submitting the proposal
- Description of the technical and management approach to be used to complete the work
- Qualifications of all personnel who will be working on the project

- Budget proposal that details the level of effort, labor costs (hours and rates of all personnel), and any material costs for each of the anticipated tasks as outlined in the scope of work, above
- Reporting schedule and project timeline consistent with the scope of work and timeline, above
- Web site addresses or listing of similar work that can be reviewed by the proposal evaluation team
- Any other material the proposer deems pertinent

Any questions regarding this RFP shall be directed to Annika Roberts. Please note that responses are limited to correcting errors in the RFP or clarifying the RFP’s provisions. If such responses provide significant information that would assist a proposer in submitting a competitive proposal, such information shall be made available by reasonable means, such as posting on the RTF’s webpage, to all persons or entities who have received the RFP to ensure all bidders have access to the same information.

#### **V. How the RTF Will Select a Final Proposal**

An evaluation team will review the proposals, and the team will include staff from the Council’s conservation group. Proposals will be evaluated using the following criteria:

- **Technical Approach:** The proposer’s technical approach to meeting each of the anticipated tasks in the scope of work.
- **Management Approach:** The proposer’s approach to managing the project, including working with Council, the RTF staff, and stakeholders.
- **Team Qualifications/Experience:** Demonstrated experience with RTF work products or similar work as well as knowledge of the electric utility and energy efficiency environments.
- **Price:** This contract will be awarded on a not-to-exceed basis.

#### **VI. RFP Schedule**

Proposals Due:	February 23, 2023
Selection of Winning Proposal(s):	Week of March 4, 2023
Project Start Date:	Week of March 18, 2023

#### **Cancellation/Rejection**

The RTF may reject any and all proposals or may cancel this RFP at any time. The RTF shall not be obligated to select any proposal resulting from this RFP nor obligated to contract with any proposer. The RTF is not liable to any proposer for any loss or expense caused by or resulting from the delay, suspension, or cancellation of the RFP, award, or rejection of any proposal.

#### **Costs of Submitting Proposal**

Proposer shall bear all costs incurred in developing and submitting its proposal.

#### **Equal Opportunity**

The Council ensures equal opportunity for all individuals without regard to race, color, national origin, religion, gender, gender identity (including gender expression), sexual orientation, marital status, age, disability, genetic information, or military or veteran status.