REQUEST FOR PROPOSALS
2019 Regional Conservation Progress Report
January 27, 2020

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 an 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. Services Desired by the RTF

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.” 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. The findings of this data collection and analysis will inform the Council on the region’s progress against the Seventh Power Plan conservation goals.

The RTF anticipates completion of the following tasks:

Task 1. Development of Survey Tool/Data Collection Templates

Contractor will work with Council staff to 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), and the Energy Trust of Oregon. Contractor will start with previous years’ templates and refine as necessary to address new data needs and incorporate lessons learned.

At a minimum, the RTF is seeking the following information for the 2019 RCP:

- **Detailed Measure-Level Energy Savings Data**: The RTF is seeking as much detail about electric energy savings at the measure level as possible. This is to yield the most detailed view of energy savings. These data include, but are not limited to, measure name and description, information about the quantity installed, total energy savings, and information about the measure costs and lifetime. Data should include enough information to appropriately map the measure to the sector, end use, and category.¹

- **Total Expenditures**: The RTF is seeking as much information about total expenditures as possible. In addition to the direct costs for energy efficiency, this includes expenditures such as program administration, marketing, etc. The RTF is also seeking information about funding source. This information should be provided at the sector-level, if not more granularly.

- **Other Market Savings**: The RTF is seeking information on other market savings, including codes, standards, and other market momentum, in order to provide a comprehensive look at progress against the Seventh Power Plan. At a minimum for 2019, the RTF expects data to support analysis of residential and commercial code savings for the state of Washington, and market change for residential lighting, residential consumer products, non-residential lighting, residential HVAC, and potentially other markets.

- **Updates/Corrections to 2016-2018**: The RTF seeks to provide an accurate representation of conservation progress. This includes reflecting any updates or corrections to the 2016-2018 data that may result from evaluations or other utility updates.

- **Forecasts**: The RTF is seeking data to inform plans for energy efficiency in 2020-2021. This would include data on energy-efficiency targets and planned budgets.

¹ The Seventh Plan aligned its analysis to the BPA Taxonomy, to the extent possible. For reference, the BPA Taxonomy is available here: [https://nwcouncil.box.com/v/BPATaxonomy](https://nwcouncil.box.com/v/BPATaxonomy).
In developing the survey template(s), Contractor should be mindful about collecting information that can be reported out at the state level (i.e. utilities that cross state lines should provide information separately for each state). The RTF is specifically interested in both first year and lifetime gross savings. Contractor should also be mindful about how to get sufficient consistency in data reported to allow for proper mapping and data aggregation and analysis.

**Anticipated Deliverable:** Final data collection template(s)

**Anticipated Task Completion Date:** April 3, 2020

### Task 2: Development of Data Collection Plan

Contractor will work with Council staff to develop a data collection plan. For planning purposes, the RTF anticipates collecting data from the following sources:

- **Bonneville Power Administration:** Bonneville provides energy savings on behalf of its customer utilities. This includes any energy savings reported to Bonneville in time for the RCP. Bonneville also provides data on Energy Efficiency Incentive (EEI) expenditures for its customer utilities. Bonneville is also anticipated to provide momentum savings estimates for a few markets.

- **Bonneville Customer Utilities:** The RTF has traditionally reached out to a selection of Bonneville customers to provide additional data. This includes information on any savings not yet reported to Bonneville or for projects classified as non-reportables. This also includes additional expenditures data, including any self-funded conservation expenditures, program administration, marketing, and other costs. The Contractor will work with Council staff to identify which Bonneville Customer Utilities to contact and a plan for coordinating with them.

- **Energy Trust of Oregon, Investor Owned Utilities, and Mid-Columbia Utilities:** The RTF reaches out to these entities to provide information on their savings and expenditures, as described above.

- **Northwest Energy Efficiency Alliance:** NEEA provides data on its savings over the Seventh Plan baseline and related expenditures. NEEA also provides data on total market savings, in support of quantifying other market savings.

- **State/Local Entities:** The states may achieve energy efficiency savings outside of the utility program structure and may require reaching out to state and local entities directly to capture those savings.²

- **Public Filings:** Data provided public filings, such as I-937 reports, has been used to provide a quality control check and round out the data collection, as needed.

Contractor will also work with Council staff to develop a list of contacts at each of the organizations. This process will include reaching out to organizations to confirm the appropriate contact person. Contractor will also work with Council staff to develop appropriate data transfer protocols.

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² For example, the Clean Energy Fund in Oregon and the associated surcharge funding in the City of Portland may produce energy efficiency not captured directly through utilities and NEEA.
Anticipated Deliverable: Final data collection plan

Anticipated Task Completion Date: April 3, 2020

Task 3: Data Collection and Coordination

Contractor will work with the Council staff to request data from all entities using the data collection template developed in Task 1 and following the data collection plan defined in Task 2. Data collection is anticipated to start in early April 2020 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 RTF Manager in a timely manner to allow for appropriate follow up by Council staff, as necessary.

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

Anticipated Deliverable: Completed data from all entities

Anticipated Task Completion Date: May 29, 2020

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 work to clean and aggregate data for development of a draft RCP Workbook. This includes, but is not limited to:

- Making minor workbook enhancements
- Mapping measure data to the BPA Taxonomy, to allow for better aggregation of data across different organizations
- Removing any data necessary to avoid double counting\(^3\)
- Remove any savings not related to electric energy efficiency\(^4\)
- Correcting/updating previous year data, as necessary
- Ensuring common units to support aggregation across organizations and years\(^5\)
- Working with Council staff to collect other important data inputs for reporting (example EIA data and market prices)

\(^3\) For example, some utilities provide their savings from NEEA programs. To avoid double counting those savings with the savings provided by NEEA, the Contractor should remove those NEEA savings from the specific utility reports. Another concern is to avoid double counting savings provided by Bonneville on behalf of its utilities with the data collected directly from the Bonneville Customer Utilities.

\(^4\) This includes any natural gas savings, solar initiatives, savings from fuel conversion measures, etc.

\(^5\) For example, seeking similar units’ data for each measure will allow better aggregation of total units. Another example is the year for which savings are provided (fiscal vs calendar year), and to ensure consistency across years.
Responders submitting proposals should include proposed plans for data cleaning, mapping, and aggregation to meet the needs of Task 4 as described.

Once data are cleaned, Contractor should conduct analysis as directed by the RTF Manager.

Responders submitting proposals should look at the 2018 RCP Workbook for an example of the types of analysis that might be required.

**Anticipated Deliverable:** Draft workbook for Council staff review

**Anticipated Task Completion Date:** July 17, 2020

**Task 5. Finalization of Measure Workbook**

Contractor will work with Council staff to finalize the workbook. This will require back and forth with the 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 28, 2020

**Task 6. Project Wrap Up**

Prior to completion of the project, Contractor should provide all data to the RTF, along with a memo summarizing the process, analysis, data gaps, results, and suggestions for future year improvements. This includes the raw data from the reporting entities, along with the cleaned, aggregated data. The close out memo should include details about each task. It should include enough detail to provide a blue print for future year’s analysis.

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

**Anticipated Task Completion Date:** September 30, 2020

**III. Timeline and Budget Expectations**

For planning purposes, the RTF 2020 work plan estimates $50,000 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.

- Late March – Early April: Develop data collection template and plan

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6 This can be found on the RTF website at: [https://rtf.nwcouncil.org/about-rtf/conservation-achievements/2018](https://rtf.nwcouncil.org/about-rtf/conservation-achievements/2018).

7 It is anticipated that the 2018 RCP Workbook will be updated to include new data and at least one additional data field on the measure savings tab. Contractor may propose changes to that workbook to streamline data analysis.
• April – May: Work with Bonneville Power Administration, utilities, NEEA, and Energy Trust to provide data required for reporting
• June – August: Compile, analyze, and QC data for reporting to Council staff
• September: Presentation by the RTF Manager/Chair to the Council

IV. How to Submit a Proposal

Proposals should be submitted to the RTF in electronic form by **February 28, 2020.**

Proposals should be emailed to:
Northwest Power and Conservation Council
Jennifer Light
RTF Manager/Chair
Jlight@nwcouncil.org
(503) 222-5161

Proposals shall be limited to 10 pages (not including CVs) and 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 major tasks as outlined in the draft Statement of Work
• Reporting schedule and project timeline consistent with the draft Statement of Work
• Web site addresses or listing of similar work that can be reviewed by the RTF proposal evaluation team
• Any other material the proposer deems pertinent

Any questions regarding this RFP shall be directed to Jennifer Light. 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. 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 tasks in the draft Statement 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 **UPDATED**

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<thead>
<tr>
<th>Event</th>
<th>Dates</th>
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<tbody>
<tr>
<td>Intent to Respond Due:</td>
<td>March 13, 2020</td>
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<tr>
<td>Proposals Due:</td>
<td>February 28, 2020</td>
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<tr>
<td>Selection of Winning Proposal(s):</td>
<td>Week of March 2, 2020</td>
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<td>Project Start Date:</td>
<td>Week of March 9, 2020</td>
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