

**Pacific Power 2023 Energy Efficiency Request for Proposals - General Proposal Evaluation and Selection Criteria – for public comment**

**April 7, 2023**

*Pacific Power is seeking comments on the following DRAFT general proposal evaluation and selection criteria. Please provide any comments in writing by **April 30, 2023**, to [WattsmartBusiness@pacificpower.net](mailto:WattsmartBusiness@pacificpower.net)<sup>1</sup>. Pacific Power will review and incorporate comments as appropriate. Note: The information below is subject to change, and the actual content in the Request for Proposals expected July 2023 may vary based on further consideration and comments received.*

**Introduction**

In 2023, Pacific Power (Company) will be seeking proposals for the delivery and support of Home Energy Savings and Wattsmart Business<sup>2</sup> energy efficiency programs in California and Washington.

- a. Home Energy Savings      [Washington](#)                      [California](#)<sup>3</sup>
- b. Wattsmart Business        [Washington](#)                      [California](#)<sup>4</sup>
- c. Energy Efficiency Plans    [Washington](#)                      California

The Company will be seeking a single or multiple Consultant(s) to provide turn-key services including but not limited to (1) cost-effective delivery in compliance with program tariffs, (2) program design, (3) technical design / analysis, (4) marketing (including but not limited to a complete website for Home Energy Savings), (5) working with market participants and channel allies, processing incentive applications, (6) program and/or process improvement, (7) online applications and tools, (8) quality assurance and control, (9) customer service, (10) call center operations, (11) budget management, (12) forecasting, data management and reporting. There will be a focus on partnerships/contracts that provide for

- flexibility to achieve Company goals, which may fluctuate throughout the term of the contract, and
- meeting equity objectives.

The services in the RFP may be bid on as a whole, or individually based upon justified specializations and/or experience. The Company has a preference for a single Consultant assuming this results in overall cost efficiencies and improved results. While the outsourced delivery contract may be consolidated, the Company intends to continue to maintain its two energy efficiency programs:

- Home Energy Savings
- Wattsmart Business

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<sup>1</sup> Please send comments related to either Home Energy Savings or Wattsmart Business to this email.  
<sup>2</sup> Some program delivery services to the Company’s managed accounts are excluded from the Request for Proposals.  
<sup>3</sup> Home Energy Savings in California is transitioning in 2023 to an equity program. Equity programs are not required to meet a Total Resource Cost test of 1.0 and have equity metrics to measure performance.  
<sup>4</sup> Wattsmart Business in California is a resource acquisition program.

Consultant must be willing to service both states served by Company, contingent upon the cost effectiveness of each state proposal and approval of the respective state commissions.

### Acceptable Proposals

The following types of proposals will be considered:

- Base bids for the scope defined in the RFP that achieve the savings targets defined in the RFP<sup>5</sup>. Improvements can be included and should be clearly explained in the proposal. Base bids may be for any of these options/delivery channels:
  - Home Energy Savings and Wattsmart Business (entire scope of Request for Proposals)
  - Home Energy Savings (turn-key design and delivery)
  - Wattsmart Business (all outsourced channels and services except managed account delivery<sup>6</sup>)
  - Wattsmart Business Commercial (measures) – includes trade ally management, design and delivery for listed commercial measures, small business and midstream.
  - Wattsmart Business Industrial/Ag (measures) – includes trade ally management, design and delivery for listed industrial and agricultural measures; includes project facilitation (custom and energy management measures – commercial, industrial, agricultural).
- Alternative proposals/new offer options that either are incremental to the base bid or replace it.

Scope and pricing shall reflect the current programs as approved in each state with any proposed program changes and improvements and timing for changes identified.

Preference will be given to proven programs with measures, marketing, delivery, quality assurance, persistence data and evaluation results readily available from other similar markets. Preference will be given to offers that integrate/align with other offers in the programs and the Company's filings and Conservation Potential Assessment<sup>7</sup>.

Proposals shall be complete program designs with clear implementation plans. This includes all services necessary for the establishment and operation of the program including, but not limited to: Program Design; Technical Design & Analysis; Marketing; Customer Service & Application Processing; Administrative Management; Tracking & Reporting; Program Staffing; and Savings Targets.

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<sup>5</sup> The RFP will include savings targets by delivery channel and state as well as state and program-specific exports from the current measure library containing deemed values where available. In California, the programs align with the Electronic Technical Reference Manual (eTRM) statewide workpapers and the custom project guidelines. In Washington, the programs align with Regional Technical Forum (RTF) Unit Energy Savings measures and Standard Protocols. Proposals will include a technical proposal spreadsheet where bidders provide unit counts for deemed measures and values for custom/site specific measures that add up to the savings target. In addition to kWh savings, the proposal spreadsheet includes incentives, measure costs and other data needed for Pacific Power to assess the cost-effectiveness of proposals.

<sup>6</sup> Managed Account delivery is not part of this RFP. The managed account delivery team focuses on custom projects with large, managed accounts. The team refers listed measures at managed account sites to the teams for listed measures.

<sup>7</sup> Available online at <https://www.pacificorp.com/energy/integrated-resource-plan/support.html>

Proposals should reflect achievement of the exact savings targets by state and delivery channel shown in the RFP. If a bidder chooses to propose to achieve different savings targets, this can be submitted as an alternate bid. In any case, include a bid for the exact savings targets (referred to as your base bid) so bids can be compared.

All proposals should include a base bid. New offer/alternate options are not required.

### Selection Criteria

Proposal evaluation criteria is expected to include but not be limited to the following:

- Completeness and quality of proposal
- Proposer ability to offer independent, unbiased services (e.g., bidder does not receive significant revenue stream from sale and/or installation of products or services that are eligible for incentives through program offerings)
- Program design and delivery experience – at the company level and for key team members proposed for the contract(s)
- Start-up Plan
- Implementation Plan
  - Implementation plan by delivery channel
  - DEI outreach plan
    - Washington – to customers in Highly Impacted Communities, to vulnerable populations (see Clean Energy Implementation Plan)
    - California – to customers meeting CPUC Hard-to-Reach criteria, to Tribal households and businesses, and to meet objectives in the CPUC’s [Environmental and Social Justice Action Plan \(ca.gov\)](https://www.cpuc.ca.gov/our-work/energy-access-and-equity/environmental-and-social-justice-action-plan)
- Team organization
  - Resumes, qualifications of staff/subcontractors
    - Percent dedicated to program(s)
  - Org chart including key team members and location of field staff by delivery channel
  - DEI outreach staffing
  - Fluent Spanish/English bilingual services and capabilities
- Program management strengths (all are important, not listed in order of importance)
  - Proven track record of achieving targets/milestones on time and within budget
  - Customer service
  - Cyber security
  - Quality assurance
  - Project tracking and reporting
  - Budget management and forecasting
  - Innovation and continuous improvement/adaptive management
  - Communication
- Pricing