

## APPENDIX B-2

### Bid Proposal Instructions and Required Information

This **Appendix B-2** describes PacifiCorp’s expectations and requirements for the 2022AS RFP bids. In general, PacifiCorp expects bidders to provide any information that could impact the cost, reliability, dispatch frequency, or output capability of a resource. **Appendix E-1 - PPA and Tolling Agreement Instructions to Bidders** and **Appendix F-1 – BTA Instructions to Bidders** provide additional detail on bid document deliverables. Due to submittal requirement differences for PPAs and Tolling Agreement bids as compared to BTA bids, bidders should pay strict attention to instructions to ensure bids are in compliance with the instructions as outlined. Certain items in **Appendix F-1 and Appendix F-2** will only apply to BTA proposals (as explained in the instruction document).

#### Bid Checklist

Each bidder must provide complete information as requested. Applicable appendices, forms and attachments are outlined in the Bid Checklist table below that are required in the bid submittal. Specific appendices to include in the bid submittal are shown in Column C for the applicable bid structure type in Column D (PPA and Tolling Agreement Bidders), Column E (BTA Bidders) and Column F (demand side bidders). Additional requirements for Demand-side bidders are separately included as **Appendix Q - 2021 Demand Response RFP – Requirements for Demand-side Bids**.

#### Bid Checklist Table:

| A                              | B   | C                                   | D               | E   | F              | G               |
|--------------------------------|---|-------------------------------------|-----------------|-----|----------------|-----------------|
|                                | 2022AS RFP Bid Applicability                        | Bid must include completed Appendix | Applicable to   |     |                |                 |
| Appendix A                     | Resource Technical Specifications                   |                                     | PPA/<br>Tolling | BTA | Bench-<br>mark | Demand-<br>side |
| <i>Appendix A-2</i>            | <i>Interconnection Studies and Agreements</i>       | X                                   | X               | X   | X              | See App Q       |
| <i>Appendix A-3</i>            | <i>Permit-Matrix</i>                                | X                                   | X               | X   | X              | See App Q       |
| <i>Appendix A-5</i>            | <i>Project One-Line Drawing and Layout</i>          | X                                   | X               | X   | X              | See App Q       |
| <i>Appendix A-6</i>            | <i>Division of Responsibility</i>                   | X                                   |                 | X   |                |                 |
| <i>Appendix A-7</i>            | <i>Owner Standards and Specification</i>            | List of Exceptions                  |                 | X   | X              |                 |
| <i>Appendix A-8</i>            | <i>Real Estate Specifications</i>                   | X                                   |                 | X   | X              |                 |
| <i>Appendix A-9</i>            | <i>Product Data-Equipment Supply Matrix</i>         | X                                   | X               | X   | X              | See App Q       |
| <i>Appendix A-10</i>           | <i>Plant Performance Guarantee/Warranties</i>       | X                                   |                 | X   |                |                 |
| Appendix B-1 (B-1.1 and B-1.2) | Intent to Bid Form and Bid Fee Calculator Worksheet | X                                   | X               | X   | X              | X               |

| <b>A</b>                | <b>B</b>  | <b>C</b> | <b>D</b> | <b>E</b> | <b>F</b> | <b>G</b>  |
|-------------------------|---|----------|----------|----------|----------|-----------|
| Appendix B-2            | Information Required in Bid Proposal / Bid Proposal   |          | X        | X        | X        | See App Q |
| Appendix C-1            | Bid Summary and Pricing Input Sheet Instructions  |          |          |          | X        |           |
| Appendix C-2            | Bid Summary and Pricing Input Sheet   | X        | X        | X        | X        | See App Q |
| Appendix C-3            | Energy Performance Report   | X        | X        | X        | X        | See App Q |
| Appendix D              | Bidder's Credit Information   | X        | X        | X        |          | X         |
| Appendix E-1            | PPA and Tolling Agreement Instructions to Bidders   |          | X        |          |          |           |
| Appendix E-2.1 or E-2.2 | Redline to PPA and exhibits (PPA for generating resource only or PPA w/ collocated battery storage) | X        | X        |          |          |           |
| Appendix E-3            | Redline to Tolling Agreement  | X        | X        |          |          |           |
| Appendix F-1            | BTA Instructions to Bidders   |          |          | X        |          |           |
| Appendix F-2            | Redline to BTA Term Sheet   | X        |          | X        |          |           |
| Appendix G-1            | Confidentiality Agreement   | X        | X        | X        |          | X         |
| Appendix J              | PacifiCorp Transmission Waiver  | X        | X        | X        |          |           |
| Appendix K              | Operations and Maintenance Services   | X        |          | X        |          |           |
| Appendix L              | Non-Price Scoring Matrix  | X        | X        | X        | X        | X         |
| Appendix P              | Equity Questionnaire  | X        | X        | X        | X        | X         |
| Appendix Q              | 2021 Demand Response RFP – Document Requirements  | X        |          |          |          | X         |
| Appendix Q-1            | Redline to Professional Service Contract and Exhibits   | X        |          |          |          | X         |
| Appendix Q-1.01         | Redline to Contract Exhibit A – Scope of Work <sup>1</sup>  | X        |          |          |          | X         |
| Appendix Q-1.02         | Redline to Contract Exhibit B – Pricing and Performance Template                                    | X        |          |          |          | X         |

<sup>1</sup> Embedded in 2021 Demand Response RFP (Exhibit A to Professional Services Contract)

| A            | B  | C | D | E | F | G |
|--------------|--|---|---|---|---|---|
| Appendix S-1 | Berkshire Hathaway<br>Energy – Cyber Security<br>Attestation | X | X | X |   | X |

## **PROPOSAL FORMAT**

PacifiCorp requests bidders conform to the following format for presenting their bid information:

**Section 1 – Cover Letter and Executive Summary of Proposal** – Bids must include a signed cover letter including the required statements as provided in the RFP main document, **Section 3.E**. Cover letters must be signed by an executive of the project company. Bids shall include an executive summary including a brief description of the proposal and its key benefits and advantages to PacifiCorp. The executive summary should include a general description of the technology, location, and business arrangement for the bid including a pricing summary for the bid. Bidder must confirm the terms and conditions of their proposal will remain effective through November 21, 2023. Failure of a bidder to honor the terms and conditions of its proposal for the period stated in its executive summary may result in the bidder being disqualified as a bidder in future RFPs.

**Section 2 – Resource Description** – This section should provide a description of the resource. The **Appendix B-2** narrative should describe the technology including:

- i. A summary of the bid including location, technology, megawatt (MW) nameplate capacity, contractual term and price. Generating resource bids should include a summary of the expected net output<sup>2</sup> (production profile independent of storage), capacity factors, and degradation schedule, if any. Storage bids should summarize storage capacity, duration, round-trip efficiency and degradation schedule, if any.
- ii. A summary of the site, including GSP coordinates, a description of topology, geology, climate and resource studies completed and data available.
- iii. A summary of site control for the primary site and any necessary right-of-way or easements for transmission, roads, or access to the site.
- iv. A description of site layout including proximity to interconnection points, ingress and egress, local communities, and environmental features. The proposed site(s) must clearly be shown on a United States Geological Survey (USGS) 7.5-minute series map.
- v. A summary of critical issues analysis including key findings, studies completed and outstanding, and any other material considerations impacting the site suitability, potential schedule risk, or overall project viability.
- vi. A development status, including remaining permits and approvals and a milestone schedule summarizing estimated completion dates for key development, procurement, construction and interconnection milestone.
- vii. A summary of interconnection and transmission locations, available studies, agreements and plans for interconnection. Off-system bidders shall summarize the transmission provider, control area, point of delivery, completed studies, transmission availability and status of transmission service agreement.
- viii. A summary of the generating resource and/or storage technology type, including expected usable life, site suitability and decommissioning plans. BTA bids shall confirm conformance to the Technical Specifications in Exhibit A and include a list of exceptions, if any. Bids utilizing

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<sup>2</sup> See contract definition of Expected Net Output in pro forma contracts.

previously owned/operated equipment shall include a summary of hours of operation and major maintenance performed.

- ix. A summary of the resource performance analysis, prepared by an independent third-party engineering firm or established in-house service provider (subject to validation by PacifiCorp), including expected capacity factors, annual energy production, storage cycles, and annual degradation. Bidder shall also summarize expected and guaranteed annual energy production, estimated annual availability, any guaranteed minimum annual availability, any operating limits, and any limits on the number of hours the resource may be operated per year or unit of time.
- x. A procurement sourcing, supply chain, engineering and construction strategy, including summary of key equipment and manufacturers as well as any tax considerations.
- xi. Summary of construction and project financing strategy.
- xii. Summary of operations and maintenance plan and service, including any warranty terms and/or guarantees on major equipment.
- xiii. A summary of key responses to the equity questionnaire such as supplier, contractor and workforce diversity, community and environmental benefits and burdens of the projects. Washington-state located resources should summarize how they will increase energy benefits and/or reduce burdens to highly impacted communities and vulnerable populations.
- xiv. The **Appendix B-2** narrative shall reference, summarize and otherwise emphasize the detailed supporting documents provided in the required appendices:
  - i. **Appendix A-2 Interconnection Studies and Agreements,**
  - ii. **Appendix A-3 Permit Matrix,**
  - iii. **Appendix A-5 Project One-Line Drawing and Layout,**
  - iv. **Appendix A-9 Product Data-Equipment Supply Matrix,**
  - v. **Appendix C-2 - Bid Summary and Pricing Input Sheet,**
  - vi. **Appendix C-3 Energy Performance Report**
  - vii. **Appendix D Bidder's Credit Information**
  - viii. **Appendix L Non-Price Scoring Matrix**
  - ix. **Appendix P Equity Questionnaire**
  - x. **Appendix Q 2021 Demand Response RFP – Requirements for Demand-side Bids**

BTA bidders shall also reference, summarize and otherwise emphasize the detailed supporting documents provided in the required BTA-specific appendices:

- i. **Appendix A Technical Specifications**
- ii. **Appendix A-6 Division of Responsibility**
- iii. **Appendix A-7 Owners Standards and Specifications**
- iv. **Appendix A-8 Real Estate Specifications**
- v. **Appendix A-10 Plant Performance Guarantee/Warranty**
- vi. **Appendix K Operations and Maintenance Services**

**Section 3 - Bidder's Qualifications** – Information in this section should be consistent with information provided in **Appendix D – Bidder's Credit Information** in the Intent to Bid submittal. This section should include, but not be limited to, the following information:

- Corporate structure and primary and secondary businesses including all legal entity names.
- Location of offices.
- Biographies of key officers.
- Summary of comparable experience developing, financing, constructing and operating generating and/or storage resources.

- Description of developer projects and independent power supply ventures participated in the last three to five years.
- Professional references including at least one primary contact and one back-up contact (name, telephone number and e-mail address) for each project or power supply venture referenced in the bidder's proposal.
- Description of any current or previous contract dispute(s) involving similar projects in which the bidder is or was involved during the last five years.
- Separate descriptions, as appropriate, for each member of a consortium or partnership of two or more firms and the relationship between the firms for this proposal.

**Section 4 - Financial Information** – Bidder shall reference, summarize and otherwise emphasize the detailed supporting documents provided **Appendix D – Bidder's Credit Information** in the Intent to Bid submittal.

**Section 5 - Pricing Proposal and Project Financing Strategy, including tax equity strategy** – Describe in detail the pricing proposal, including the use of any index, escalation factors, or other costs to PacifiCorp. Bidders shall complete **Appendix C-2 – Bid Summary and Pricing Input Sheet**, summarize their offered pricing and describe underlying assumptions in the bid narrative. Bidders shall further describe their project financing strategy, including construction financing and whether bidder has or plans to use third-party tax equity. The bidder shall describe whether third-party tax equity commitments have already been established for the project, and bidder shall otherwise describe how it intends to conform and be eligible for production or investment tax credits and other available tax incentives for the project.

**Section 6 – Interconnection & Transmission Service** – Bidder shall include a detailed description of the location of its proposed interconnection facilities, distribution or transmission facilities, including proposed delivery points consistent with information provided in **Appendix A –Technical Specifications and Required Submittals, Appendix A-2 – Interconnection Studies and Agreements** and **Appendix A-5 - Project One-Line Drawing and Layout**. Bidders should be aware of any transmission requirements or specifications that could affect their equipment selection and costs and take those specifications into consideration in preparing their bid submittal. Bidders should review and understand the North America Electric Reliability Corporation (NERC) guidelines regarding technical requirements and modeling for renewables.<sup>3</sup>

Bids with projects directly interconnected to PacifiCorp's system. For proposed new resources, PacifiCorp requests that bidders request that their interconnection requests be studied for both Energy Resource Interconnection Service (ERIS) and Network Resource Interconnection Service (NRIS). Bidders shall summarize the cost for any direct assigned and network upgrades resulting from a completed interconnection study by PacifiCorp. Prospective bidders are responsible for having worked with PacifiCorp Transmission, as necessary, to ensure that all cluster study requirements included in the Open Access Transmission Tariff (OATT) were met by May 15, 2022 when, according to the current OATT as of the date of this issuance, the Cluster Request Window will have closed. Bidders shall confirm that their bids are consistent with completed interconnection studies and/or executed LGIAs provided as part of their **Appendix A-2 - Interconnection Studies and Agreements** bid submittal or otherwise demonstrate that the interconnection/transmission provider will not require a material modification.

Bids not directly interconnected to PacifiCorp's system. For proposed new resources, PacifiCorp requests that bidders request that their interconnection requests be studied for both ERIS and NRIS. Off-system bidders shall summarize the interconnection studies included in their **Appendix A-2 - Interconnection Studies and Agreements**, including the interconnection cost and milestones demonstrating their

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<sup>3</sup> NERC, Improvements to Interconnection Requirements for BPS-Connected Inverter-Based Resources, September 2019

proposed commercial operation date. Finally, off-system bids shall demonstrate the availability of, and request for, long-term, firm point-to point transmission service from the resource's point of interconnection with the third party's system to the bidder's proposed point of delivery on PacifiCorp's system.

**Section 7 – Environmental and Siting** – PacifiCorp requests all bidders provide a critical issues analysis document. Bidder shall confirm in their **Appendix B-2** bid narrative that i) bidder will apply for required eagle take permit for the construction and operations of any wind projects, and as appropriate, for other energy sources (such as long-term or temporary disturbance [ie nest disturbance] or take from project development or operations), ii) bidder will identify and implement, voluntarily or as agreed upon with applicable agency, cut-in speed adjustment, curtailment strategy, and/or bat deterrent systems to address bat impacts at wind projects, and iii) bidder will utilize applicable wildlife siting guidance and meaningful coordination with state/federal wildlife agencies to avoid, minimize, and/or mitigate potential impacts to wildlife and their habitat. Bidder shall transfer any eagle take permit obtained to PacifiCorp should PacifiCorp become the owner of the project, and ii) bidder understands it is exclusively and entirely responsible for meeting and satisfying all federal, state and local laws, permits, licenses, approvals and/or variances required to assure physical delivery of energy in accordance with any PPA, Tolling Agreement, BTA or professional services agreement. Bidder shall reference, summarize and otherwise emphasize all applicable permits that bidder has secured or will be required to receive in order to construct and operate the facility consistent with the information submitted in **Appendix A-3 – Permit-Matrix**.

Bidder must provide any additional material information including scoping, feasibility and other associated studies conducted to assess environmental impacts and to obtain necessary permits. BTA bids must include all material studies related to wildlife (including eagles, all bats, sage-grouse, ungulates, and other protected species, such as those protected under the federal Endangered Species Act, federal Bald & Golden Eagle Protection Act, federal Migratory Bird Treaty Act and/or other applicable Federal and state laws), archeological, vegetation, hydrological, geotechnical, visual, noise, air quality, and other environmental impacts related to the project. The bid narrative shall note impacts to designated wilderness, national and state parks, and other scenic or protected areas. The bid narrative shall describe the methodologies for such studies and identify the person(s) or firm(s) who conducted and completed the work. If such studies are in progress, bidder should describe the scope and schedule for completion and identify the person(s) or firm(s) doing the studies and methodologies to be employed. Bidder should describe measures that will be taken to minimize the potential for environmental, wildlife, visual and cultural impacts of the project. Wildlife measures may include buffers from wildlife nesting/habitat (eagle/raptor nest buffers, prey base buffers, sage-grouse lek and habitat buffers, etc.), potential curtailment or cut-in speed strategies (bat cut-in speed adjustments, eagle curtailment, etc.), and/or other significant avoidance, minimization, and/or mitigation efforts. Finally, bidder should discuss plans to engage community and environmental stakeholders to support the proposed project.

To the extent applicable, bidder should include in the **Appendix B-2** bid narrative the following information with respect to any proposed facility site (see **Appendix A – Technical Specifications and Required Submittals** for additional detail applicable to specific resource type):

- i. List of all studies conducted; required environmental, construction and other regulatory permits and timelines.
- ii. Prevailing noise ordinance at the site and expected sound level (A-weighted) at the site boundary.
- iii. Proposed site plans, layouts, elevations or other aspects of the facility.
- iv. Types of transportation access required.
- v. A Phase I Environmental Site Assessment conducted or updated in the last three months.

- vi. Characterization of the area surrounding the site including a description of local zoning, flood plain information (100 yr. & 500 yr.), existing land use and setting (woodlands, grasslands, agriculture, etc.).
- vii. Proximity and extent of nearest wetlands and description of all types of all nearby wetlands and water bodies, including any proposed impacts.
- viii. Information on fish, avian species and other wildlife and vegetation inhabiting the area of the project, such as a Site Characterization Study (Tier I/II) and/or a Critical Issues Analysis report.
- ix. Proximity to nearest endangered or threatened or critical species habitat and information on all nearby endangered or threatened species or their nests and/or habitat which could potentially be impacted, including species protected under the federal Bald and Golden Eagle Protection Act and the federal Migratory Bird Treaty Act.
- x. All studies performed or planned for bats species and an assessment of cut-in speed adjustment, curtailment losses, and/or deterrent systems costs.
- xi. Proximity to nearest historical or archaeological resources and all nearby historical or archaeological resources which could potentially be impacted.
- xii. Location and distance to population centers which could be impacted.
- xiii. Expected site ambient temperature extremes and verification that freeze protection will be provided if necessary.

**Section 8 – Contract Terms** – In addition to the redlines of the contract pro formas and term sheets as provided in **Appendix E-2 PPA Documents, Appendix E-3 Tolling Agreements, Appendix F-2 BTA Term sheet, or Appendix S-2 Professional Services Contract**, Bidder must identify and specify in the bid narrative they key exceptions to the terms and conditions from their redline of the contract pro formas or term sheet, as applicable. Bidder should include the issue list as part of the bid narrative. The issue list should summarize the priority exceptions to the terms and conditions from the pro forma documents or term sheets and the reason or context for why bidder feels their exception is reasonable. Bidder's narrative should suggest alternate language and context for each item on the issues list. Conformity to the pro forma documents is strongly encouraged so bidders should use the bid narrative to support any proposed redlines.

**Section 9 – O&M Services Contract Terms (BTA Option Only)** – BTA bidders must provide a comprehensive listing/description of all contract terms that the bidder would seek during contract negotiations regarding operating and maintenance services for the asset. In addition to the bid narrative, BTA Bidder are required to supply a markup of the applicable form in **Appendix K - Operations and Maintenance Services** for the proposed resource or else provide a separate operating and maintenance service proposal with their bid submittal. Conformity to **Appendix K** terms is strongly encouraged. Bidders objecting to terms are encouraged to use the bid narrative to explain any proposed redlines and provide context for PacifiCorp to evaluate the proposed change to the pro forma document.

**Section 10 – Equity Summary** - Of particular value are those resources which provide benefits to highly impacted communities and vulnerable populations in Washington<sup>4</sup> and projects that provide environmental and economic benefits to communities afflicted with poverty or high unemployment, or that suffer from high emission levels of toxic air contaminants, criteria air pollutants, and greenhouse gases in California<sup>5</sup>. PacifiCorp is committed to and understands the importance of promoting diversity among its suppliers, consultants and their subcontractors by increasing the amount of business conducted

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<sup>4</sup> [https://www.utc.wa.gov/\\_layouts/15/CasesPublicWebsite/CaseItem.aspx?item=document&id=00076&year=2019&docketNumber=190837&resultSource=&page=1&query=190837&refiners=&isModal=false&omItem=false&doItem=false](https://www.utc.wa.gov/_layouts/15/CasesPublicWebsite/CaseItem.aspx?item=document&id=00076&year=2019&docketNumber=190837&resultSource=&page=1&query=190837&refiners=&isModal=false&omItem=false&doItem=false)

<sup>5</sup> PUC399.13(8) (A)

with qualified diverse business enterprises, including women-owned, minority-owned, disabled veteran-owned, and lesbian, gay, bisexual, and transgender (“LGBT”)- owned businesses.

All Bidders are requested to complete **Tabs 1 and Tab 2 of Appendix P – Equity Questionnaire**. When considering resources to be allocated to Washington customers, Appendix P – Equity Questionnaire responses will be used in the final phase of the evaluation process to measure Washington customer benefit indicators as part of Washington’s CETA. As resource allocations are not yet known, PacifiCorp requests that all bidders complete **Tab 2 of Appendix P- Equity Questionnaire** to the best of their knowledge and ability.

California-located bidders must compete **Tab 3 of Appendix P- Equity Questionnaire**, which contain California-specific questions.

All bidders shall summarize the following in their bid narrative:

- Summary of proximity and population characteristics of the nearest community to where facility is proposed.
- Bidder to describe itself and its own project team, including bidder’s employee diversity statistics. Summary of supplier, contractor and workforce strategy related to diversity targets for suppliers, contractors or workforce during development, construction and/or ongoing operations. ***Bidders may submit one free bid alternative for a second/different diversity strategy at no additional bid fee.*** Bidder’s supplier and contractor diversity will be subject to an annual reporting requirement as part of the pro forma contractual agreement.
- Bidder to describe previous experience implementing projects in partnership with diverse communities and entities (such as subcontractors), including women-, minority-, disabled-, and veteran-owned organizations and businesses.
- Bidder to confirm whether it, its suppliers and contractors have a written diversity-equity-inclusion (DEI) commitment, policy, or plan, and whether bidder or project leadership have received DEI training.
- Bidder to outline expected local community impacts due to short-term and long-term job creation, workforce training or apprenticeship program, impacts to local tax base, and any other nonenergy community benefits derived from the new resource.
- Summary of any local impacts during construction and ongoing operations which may be expected related to water usage, traffic, diesel emissions, soil disturbance, emissions, dust, wastewater, hazardous waste, cultural sites, wetlands, endangered species, wildlife (eagles, avian/raptors, bats, ungulates, sage-grouse, etc.)), replanting and pollinator re-seeding strategies.
- Bidder to provide detail on what it has done to inform the local community of the project and project plans, including information on whether the local community been receptive to the potential development, if any groups or individuals objected to the proposed development, and, if so, what specific concerns were expressed.
- Provide a summary of community engagement for the project site and interconnection facilities to the point of delivery on the transmission system, along with any specific proposed adjustment to the project based on these engagement activities. This summary should include meeting dates, attendees, meeting minutes, community support or opposition.
- Summarize and provide copies of any letters, memos, emails, news articles, or other communications demonstrating the level of support by the local community.



- Oregon-located resources must describe how they will comply with HB2021 Clean Energy Act requirements related to apprenticeship and labor standards.
- Washington-located resources must summarize the energy and non-energy benefits and burdens to vulnerable populations and highly impacted communities and provide self-scoring of PacifiCorp's customer benefit indicators<sup>6</sup>.
- California-located resources must summarize whether it is located in a community afflicted with poverty or high unemployment or that suffers from high emission levels and how the community will be impacted by the resource.

Finally, for bids located in Washington, PacifiCorp prefers projects that utilize a project labor agreement or community workforce agreement for major construction activities associated with the construction of the project. Bidders shall make commercially reasonable efforts to ensure that such Project Labor Agreement or Community Workforce Agreements for Washington state projects are eligible to be certified by the Washington Department of Labor and Industries under the standards of the Washington State Clean Energy Transformation Act (RCW 19.405).

Bidders are requested to provide a narrative with respect to their staffing strategies and safety performance. Bidders to provide responses related to:

- Whether bidder intends to use temporary staffing agencies as subcontractors;
- Whether bidder or any proposed general contractors have been found in violation of serious safety requirements within the past three years on similar projects; and
- Whether bidder and associated contractors enroll their employees in any of the following: OSHA 10 training program, joint labor/management safety committees, joint labor/management apprenticeship programs, and other courses identified as essential to the safe and efficient installation of wind and solar power structures.

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<sup>6</sup> <https://www.pacifiCorp.com/energy/washington-clean-energy-transformation-act-equity.html>