

**Request for Proposals (RFP)**

**Washington Independent Evaluator (IE)**

**For**

**PacifiCorp's**

**2022 All-Source Request for Proposals**

Issued: **September 10, 2021 Thursday**  
Proposals Due: **September 24, 2021 Thursday**  
5:00 PM Pacific Prevailing Time

Issuing Entity: PacifiCorp

PacifiCorp  
Attn: Resource & Commercial Strategy  
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**Attachments**

- A PacifiCorp's Proposed 2022AS RFP Schedule
- B Washington Electric Company – Purchase of Resources Rules
- C Proposed 2022AS RFP Bid Evaluation and Selection Process
- C-1 2021 IRP Preferred Portfolio Incremental Resources
- D Bidder Pricing Proposal
- E Professional Services Contract

## I. INTRODUCTION AND BACKGROUND

This Independent Evaluator (IE) Request for Proposals (RFP) is being issued to comply with Washington Electric Companies - Purchases of Resources rules<sup>1</sup> while PacifiCorp conducts an all-source RFP for future resources meeting specific requirements and schedule. The IE will be required to perform the activities described in detail in this IE RFP.

The PacifiCorp 2022 All-Source Request for Proposals (“2022AS RFP”) is being issued to pursue resource need identified in PacifiCorp’s 2021 Integrated Resource Plan (IRP) Action Plan and in compliance with Washington Electric Companies - Purchases of Resources rules which require an All Source RFP within one hundred twenty days after the utility files its final IRP.<sup>2</sup> PacifiCorp’s 2021 IRP was filed September 1, 2021 and included the evaluation methodology for its next proposed All Source RFP as an IRP chapter. In order to fulfil the IRP Action Plan and acquire new resources to be commercially operational by December 31, 2026, PacifiCorp will seek Commission approval from Oregon, Washington and Utah, issue the RFP and determine the initial shortlist of resources prior to the close of PacifiCorp Transmission’s Cluster Request Window on May 16, 2022 as regulated and set forth in PacifiCorp Transmission’s Open Access Transmission Tariff (OATT).

The 2022AS RFP will accept and evaluate all resource types<sup>3</sup> which meet the minimum criteria of this RFP. Prior to the determination of the final shortlist in approximately January 2023, the 2022AS RFP will incorporate two RFPs, which will dovetail and be evaluated in parallel using the IRP portfolio optimization models. Those efforts include:

1. All source RFP (2022AS RFP) to be released in January 2022 in order to select a shortlist prior to the close of PacifiCorp Transmission’s 2022 Cluster Study Window, and
2. A demand-side resource RFP to be issued in Q2 2022 targeting but not limited to distributed energy, demand response and other customer located resources.

The IE will be retained to oversee the all source RFP process up to and including the final short list selection process in which both supply side and demand side resources will be included in the portfolio optimization model and considered for selection to the final short list. The IE will also be retained to oversee the demand side RFP prior to the final shortlist selection.

The 2021 IRP preferred portfolio includes the following incremental resources:<sup>4</sup>

1. 1345 megawatts (MW) of new proxy supply-side generation resources and 600 MW of collocated energy storage resources with commercial operation date (“COD”) by December 31, 2026.<sup>5</sup>
2. 274 megawatts (MW) of new proxy demand-side resources.

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<sup>1</sup> Washington Administrative Rules (WAC) 480-107 Electric Companies—Purchases of Resources

<sup>2</sup> WAC 480-107-017(1)

<sup>3</sup> WAC 480-107-009 (1) All-source RFP requirements. All-source RFPs must allow bids from different types of resources that may fill all or part of the characteristics or attributes of the resource need. Such re-source types include, but are not limited to, unbundled renewable energy credits, conservation and efficiency resources, demand response or other distributed energy resources, energy storage, electricity from qualifying facilities, electricity from independent power producers, or other resources identified to contribute to an equitable distribution of energy and nonenergy benefits to vulnerable populations and highly impacted communities.

<sup>4</sup> In the Matter of the Petition of PacifiCorp, d/b/a Pacific Power & Light Company, 2021 Integrated Resource Plan, Docket No. UE-200420, 2021 Integrated Resource Plan (Sept. 1, 2021).

<sup>5</sup> The figures for solar and wind exclude resource capacity added to meet assumed customer preference targets that are included in the 2021 IRP preferred portfolio.

In addition, PacifiCorp will accept bids from long lead resources requiring longer lead time to develop and construct that places the project completion beyond the required 2022AS RFP commercial operation date of December 31, 2026.<sup>6</sup>

Under the 2022AS RFP, PacifiCorp is seeking proposals for competitively priced resources capable of interconnecting with or delivering to PacifiCorp's transmission system in its east or west balancing authority areas (PACE and PACW, respectively), targeting the specific topology and resource mix as shown in **Attachment C-1 - 2021 IRP Preferred Portfolio Incremental Resources**.

PacifiCorp will accept qualified proposals from bidders who currently own or have legally binding rights to develop new greenfield resources that are discrete generating assets and can be individually metered and remotely monitored. PacifiCorp will also seek bids from existing operating facilities subject to certain limitations.<sup>7</sup> During the 2022AS RFP final short list evaluation process, PacifiCorp will run its IRP optimization tool with the top performing supply-side and demand-side resources. PacifiCorp will choose final short list resources based on providing lowest cost and risk to the system and in compliance with the procurement rules in its six-state territory.

For the 2022AS RFP, PacifiCorp will consider proposals for the following transaction structures:

1. Benchmark transaction whereby the utility proposes the project.
2. Build-transfer transaction whereby the bidder develops the project, assumes responsibility for construction and ultimately transfers the asset to PacifiCorp in accordance with the terms of a build-transfer agreement (BTA). Under this transaction structure, the bidder will be responsible for all development, design, equipment supply, construction, commissioning, and performance testing, and will be required to design and construct the resource in conformance with PacifiCorp's specifications. PacifiCorp will only be acquiring the bidder's assets under the BTA structure and will not consider BTA bids that involve the ultimate transfer of a project company to PacifiCorp.
3. Power-purchase agreement (PPA) transaction with exclusive ownership by PacifiCorp of any and all energy, capacity and environmental attributes associated with the generation. PacifiCorp will consider PPA terms between 5 and 30 years. PacifiCorp provides two forms of PPA; generation-only resources and generation resources collocated with a BESS resource. With respect to collocated resources, the term length must be the same term for both the generation and the storage resource. PacifiCorp is requiring full dispatch control of the collocated or standalone battery (charge and discharge).
4. Tolling Agreement (Toll) transaction whereby PacifiCorp controls the output of a standalone storage resource (BESS, Pumped storage hydro (PSH) or other). PacifiCorp will consider Toll terms between 5 and 30 years.
5. PacifiCorp will accept its Professional Services Contract for demand-side bids.

PacifiCorp will accept bids in the 2022AS RFP from existing operating facilities subject to the following conditions:

- Bidder cannot terminate an existing contract to bid into the 2022AS RFP

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<sup>6</sup> A review of PacifiCorp Transmission's interconnection queue showed pumped storage and nuclear as the only long-lead time resources.

<sup>7</sup> 1) Bidder cannot terminate an existing contract to bid into the 2022AS RFP; 2) The existing contract must expire before the required on-line date as proposed in a bidder's bid but no later than December 31, 2026; 3) Bid must meet all other requirements in the 2022AS RFP.

- The existing contract must expire before the required on-line date as proposed in a bidder's bid but no later than December 31, 2026.
- Bid must meet all other requirements in the 2022AS RFP

PacifiCorp will submit self-build ownership proposals (benchmark resources) and may allow for affiliate bids.<sup>8</sup> PacifiCorp benchmark resource bids will be received by the independent evaluator (IE) no later than seven (7) days prior to the receipt of market bids. The market bids will not be opened until such time as PacifiCorp benchmark resource bids have been reviewed, evaluated, and validated by the IE and PacifiCorp's evaluation team.

PacifiCorp may make specific utility assets available for bidders in this RFP consistent with WAC 480-107-025(6).

The proposed 2022AS RFP schedule is contained in **Attachment A – Proposed 2022AS RFP Schedule**.

#### A. PURPOSE

The purpose of this solicitation is to select and recommend for Washington Commission Approval an IE for PacifiCorp's 2022AS RFP. PacifiCorp will contract directly with the Commission-selected IE using **Attachment E - PacifiCorp Professional Services Contract**. The IE must be independent of the utility and potential bidders and also be experienced and competent to perform all IE functions identified in Washington's purchases of resources rules in **Section II Scope of Work**.

#### B. BACKGROUND

The Commission issued purchase of resources rules for resource acquisitions, where a utility's IRP demonstrates that the utility has a resource need within four years.<sup>9</sup> The 2022AS RFP is subject to these rules as further described in **Attachment B – Washington Electric Companies – Purchases of Resources Rules**.

Under the Commission's rules, an IE must be used when RFPs consider (1) bids from the utility, or its subsidiary, or its affiliate (benchmark bids), (2) the utility intends to retain the option to procure resources that will result in the utility owning or having a purchase option in the resource over its expected useful life; or (3) the utility is considering repowering its existing resources to meet its resource need to help ensure that all offers are treated fairly, transparently and properly.<sup>10</sup> The IE is tasked with ensuring the 2022AS RFP bid evaluation and selection process are also consistent the rules.

#### C. CONTRACT TERM AND AMENDMENTS

The IE contract is anticipated to be for an initial term of eighteen (18) months, with the option to renew on a month-to-month basis until the IE's participation in the 2022AS RFP process is completed. The IE must be available according to the schedule established by the Commission.

#### D. ESTIMATED SCHEDULE OF IE RFP EVENTS

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<sup>8</sup> Unless directed by the Commission otherwise, a PacifiCorp "affiliate" shall be limited to Berkshire Hathaway Energy Company and its subsidiaries.

<sup>9</sup> WAC 480-107-009(2)

<sup>10</sup> WAC 480-107-023(1)

The proposed schedule for selection of the Washington IE is shown below for the major milestones. Additional milestones in the selection process and the overall 2022AS RFP schedule are included in **Attachment A – Proposed 2022AS RFP Schedule** and should be reviewed during bid preparation.

<b>Milestone</b>	<b>Date</b>
Issue WA IE RFP to market	09/09/2021
WA IE Bids Due	09/23/2021
WA Commission Public Meeting Approving IE	09/30/2021
Execute Contract with IE	10/11/2021

**E. RESERVATION OF RIGHTS**

PacifiCorp reserves the right in its sole discretion to:

- Amend this RFP for any reason or cancel this solicitation without liability if cancellation would be in the public interest;
- Reject any or all Proposals received in response to this RFP, without liability, if such rejection would be in the public interest. PacifiCorp is not responsible for any costs incurred by the bidder in connection with submitting proposals, and all bidders who submit a proposal do so solely at their own expense;
- Waive any minor irregularity, informality, or non-conformance with the provisions or procedures set forth in this RFP, and to seek clarification of each proposal if necessary;
- Contact any or all references submitted with the proposal.

**F. SOLICITATION ADDENDA**

PacifiCorp may revise this RFP on or before the RFP closing date. PacifiCorp will not waive, alter, modify, supplement or amend the terms of this RFP in any manner except by written addenda issued by PacifiCorp in the same manner as the original RFP was advertised. Any purported changes, additions, interpretations or clarifications to the RFP that are issued in any manner other than as described above will not be effective, and the bidder shall not rely upon such information.

**G. PROPRIETARY INFORMATION AND CONFIDENTIALITY**

1. All information submitted by a bidder will be considered public information unless the bidder requests that information be treated as confidential, and the information is considered exempt under Revised Code of Washington (RCW) chapter 42.56 and RCW 80.04.095.<sup>11</sup> If a bidder declares any information contained in its bid submittal to be confidential, the bidder must specifically identify those sections as containing “Confidential Information” and briefly explain how and why the information is exempt from disclosure to the public in accordance with RCW chapter 42.56 and RCW 80.04.095. Specifically, any documents submitted and any documents exchanged between the parties that contain Confidential Information shall be marked on the outside as containing Confidential Information, and each page upon which Confidential Information appears must be marked as containing Confidential Information. The Confidential Information should be clearly identifiable to the reader wherever it appears.

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<sup>11</sup> See also, WAC 480-07-160.



2. All copies submitted, as well as the original proposal, must be marked in this manner. The request must also include the name, address, and telephone number of the person authorized by the bidder to respond to any inquiries by PacifiCorp concerning the confidential status of the materials. PacifiCorp agrees to treat such information as confidential and to submit such information to the Commission, or commissions, and other parties in accordance with a protective order.
3. In addition, the bidder agrees that certain Commission-authorized entities must be allowed to review such confidential materials.
4. All information supplied to PacifiCorp or generated internally by PacifiCorp is and will remain the property of PacifiCorp. To the extent bidder receives information from PacifiCorp, bidder must maintain the confidentiality of such information and such information may not be provided to any third party before, during or after this IE RFP process unless required by law or regulatory order.
5. To the extent the Bidder selected as the IE for the 2022AS RFP receives information from PacifiCorp, the IE must maintain the confidentiality of such information and such information may not be provided to any third party before, during or after the 2022AS RFP process unless required by law or regulatory order.

## II. SCOPE OF WORK

### A. DELIVERABLES

The 2022AS RFP is being issued in response to the resource need that was identified in the 2021 IRP. The RFP is time sensitive due to the need to identify an initial shortlist before the close of the Cluster Study Request Window on May 16, 2022 per PacifiCorp Transmission's Open Access Transmission Tariff. Consequently, the scope of work has a condensed and rigorous schedule up to the selection of the initial shortlist, which IE bidders should fully consider in their proposals.

1. IE ASSESSMENT OF RFP DESIGN
  - a. PacifiCorp will file an initial draft 2022AS RFP with the Commission after selection of the IE to allow an opportunity for the selected IE to participate in the final drafting and stakeholder comments to the draft RFP and provide other feedback before the final draft RFP is filed and approval process is completed.<sup>12</sup> This process will ensure that the final draft RFP reflects any comments received by both stakeholders and the IE without delaying the timeline for selection of an initial shortlist of bids.
  - b. The selected IE will complete a thorough assessment of the 2022AS RFP design and submit its assessment of the final RFP draft to the Commission when PacifiCorp files its final draft RFP for approval. The assessment should review the adequacy, accuracy, and completeness of all solicitation materials to ensure compliance with the Commission's purchases of resources rules and consistency with accepted industry standards and practices.
  - c. The IE will participate in joint meetings and discussions via Teams or Zoom, as needed, with Oregon and Utah's selected independent evaluators regarding the overall RFP process and final comments on the 2022AS RFP to ensure the final draft RFP is consistent

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<sup>12</sup> WAC 480-107-023 (5) (b)

across PacifiCorp's states as submitted to the Washington, Oregon, and Utah Commissions. PacifiCorp has proposed two specific joint IE meetings; one to cover the overall RFP process and a second to review final draft RFP to align comments from Washington, Oregon, and Utah stakeholders. These meetings are expected to occur via Teams or Zoom video meetings. Additional virtual or face-to-face meetings may be established during the RFP process.

## 2. REPORTS

The IE will be required to file the following identified RFP reports with the Commission:

- a. Final Draft RFP Assessment: The IE will complete and file an assessment of the final RFP draft as described in A.1.a above at the time PacifiCorp files its final draft RFP for Commission approval. The IE will verify the RFP contents meet the criteria in WAC 480-107-025.
- b. Bid Scoring: The IE will independently score the competing bids and file the scores with the Commission. PacifiCorp intends to submit multiple benchmark bids, and so this task will be completed to provide results to the Commission. This report will be provided to the Commission under seal or as highly confidential information subject to an amended protective order.<sup>13</sup> The IE will verify the RFP bid ranking procedure meets the requirements in WAC 480-107-035 (1)-(6).
- c. Closing Report: The closing report will provide the IE's detailed assessment of PacifiCorp's selection of the final short-list of bids, including all aspects of the solicitation process and the IE's involvement, observations, conclusions and recommendations. The reasons and basis for PacifiCorp's evaluation and selection process are to be fully detailed in the IE's closing report, including a) ranking benchmark and market bids, b) selecting and scoring benchmark and market bids, and c) rejecting benchmark and market bids. After reconciling rankings with the utility in accordance with WAC 480-107-035(3) the closing report must:<sup>14</sup>
  - a. Include an evaluation of the competitive bidding process in selecting the lowest reasonable cost acquisition or action to satisfy the identified resource need, including the adequacy of communication with stakeholders and bidders; and
  - b. Explain ranking differences and why the independent evaluator and the utility were or were not able to reconcile the differences.

The closing report will also include an analysis of whether or the extent to which:

- a. the resources selected minimize long-term costs for PacifiCorp's retail customers taking into consideration overall system costs and risks,
- b. the solicitation process was fair,
- c. screening factors and weights were applied consistently and comparably to all benchmark and market bids,
- d. credit and security requirements, liquidated damages provisions, resource performance and operational characteristics, warranties and other similar

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<sup>13</sup> See WAC 480-07-420(2)

<sup>14</sup> WAC 480-107-023 (5) (g)

requirements were appropriately applied to bid evaluation and appropriately affected the outcome of the solicitation process,

- e. all reasonably available data and information necessary for a potential bidder to submit a bid was provided,
- f. the IE was provided with or given access to all data, information and models relevant to the solicitation process to permit full and timely scoring, testing and verification of assumptions, models, inputs, outputs, and results,
- g. confidentiality claims and concerns between the IE and PacifiCorp were resolved in a manner that preserved confidentiality as necessary, yet permitted dissemination and consideration of all information reasonably necessary for the bidding process to be conducted fairly and thoroughly, and
- h. the evaluation was performed consistent with Commission-approved purchases of resources rules.<sup>15</sup>

The closing report will also include an evaluation of the unique risks, burdens, and benefits of each bid.<sup>16</sup>

## B. OTHER ACTIVITIES

1. In consultation with Commission Staff, participate in additional meetings with parties, hosted by Staff, related to final short-list selection or any request for acknowledgment of the final short-list.
2. Participate in the pre-bid RFP conference and be available to discuss the IE role in the 2022AS RFP process. Participate in any additional pre-bid conferences.
3. Review and comment on PacifiCorp's screening process for bidder eligibility.
4. Participate in any Commission public meeting (if any) related to the Commission's consideration of RFP approval, based on the IE's assessment of the 2022AS RFP design.
5. Monitor all aspects of the solicitation process from the RFP issuance through the final shortlist of bids, including the following:
  - a. Opening and cataloging of benchmark and market bids including bid fees,
  - b. Bidder eligibility screening,
  - c. Communications between bidders and PacifiCorp before and after proposals are due,
  - d. Provide to the utility the independent evaluator's minutes of meetings and the full text of written communications between the independent evaluator and the utility and any third-party related to the independent evaluator's execution of its duties
  - e. Any requested bidder updates,
  - f. Any RFP amendments issued by PacifiCorp,
  - g. Evaluation and ranking of responses,
  - h. Selection of the initial shortlist bids,
  - i. Selection of the final shortlist of bids, and

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<sup>15</sup> WAC 480-107

<sup>16</sup> WAC 480-107-023 (5) (c)

6. Audit the evaluation process and validate the evaluation criteria, methods, models, and other solicitation processes have been applied as approved by the Commission and consistently and appropriately applied to all bids. Verify assumptions, inputs, outputs and results are appropriate and reasonable.<sup>17</sup>
7. Verify the basis for selection of the initial shortlist of bids.
  - a. Verify that the price score is calculated as appropriate for the product and technologies submitted in the bids.<sup>18</sup>
  - b. Verify that the non-price score is based on resource characteristics identified in PacifiCorp's most recent acknowledged IRP Action Plan or IRP Update (e.g., resource term, type, development, operational characteristics, etc.) and materially conforming to the standard form contracts or term sheets attached to the RFP.
8. Verify the basis for selection of the final shortlist of bids.
  - a. Verify the impact of PacifiCorp Transmission's interconnection agreements or study reports setting forth the cost and timing of each project's interconnection service on the selection of the final shortlist from the initial shortlist.
  - b. Verify the results of modeling the effect of candidate resources on overall system costs and risks.<sup>19</sup>
  - c. Verify that the portfolio modeling and decision criteria used to select the final shortlist of bids are consistent with the modeling and decision criteria<sup>20</sup> used to develop PacifiCorp's IRP Action Plan.
9. Advise PacifiCorp and Commission Staff of any issue that might reasonably be construed to affect the integrity of the solicitation process and provide PacifiCorp an opportunity to remedy the defect identified. Advise Commission Staff of significant changes or unresolved issues as they arise.
10. Independently score all of the benchmark and market bids to determine whether the selections for the initial and final shortlists are reasonable.
11. Evaluate the unique risks, burdens, and benefits of each bid consistent with PacifiCorp's Clean Energy Implementation Plan.
12. Independently evaluate the unique risks and advantages associated with a benchmark bid or a bid using the build-transfer structure as contemplated in this RFP, including the regulatory treatment of costs or benefits related to actual plant operation costs and performance differing from what was assessed in the RFP.
13. Compare the IE's and PacifiCorp's scoring and evaluation of the competing bids and attempt to reconcile and resolve any scoring differences.

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<sup>17</sup> WAC 480-107-023 (5) (e)

<sup>18</sup> WAC 480-107-023 (5) (f)

<sup>19</sup> WAC 480-107-023 (5) (f)

<sup>20</sup> WAC 480-107-035 (1)

14. Participate in Commission proceedings on acknowledgment of the final short-list of bids if PacifiCorp requests such acknowledgment. Participation would include oral comments at a Commission public meeting or hearing.
15. Participate in any additional meetings with parties on request.

### III. MANDATORY MINIMUM QUALIFICATIONS

For this IE RFP, the IE must be independent of the utility and potential bidders. The following are minimum requirements that must be demonstrated by Bidders:

1. Bidder shall be experienced and competent to perform all IE functions identified in the purchases of resources rules
2. Bidder shall disclose all business conducted with PacifiCorp or its affiliates, past or present.
3. Bidder shall re-confirm, upon receipt of the 2022AS RFP bidder list, that the bidder has no conflict of interest with any of the bidders or their affiliates.
4. Bidder shall disclose any conflict, or potential conflict of interest, that might arise during the course of the project, including any potential bidders in PacifiCorp's 2022AS RFP.
5. Bidder shall demonstrate its experience and competence in assessment, evaluation and monitoring related to competitive bidding for electricity supplies including renewable and thermal resources and demand-side resources.
6. Bidder shall demonstrate its experience and competence in assessment and evaluation of storage technologies including operational dispatch of batteries as part of an electric utility's resource portfolio.

### IV. PROPOSAL CONTENTS

Bidders must include the following in their proposal:

#### A. QUALIFICATIONS

The bidder shall provide all information deemed necessary to fully demonstrate the bidder's qualifications as required under Article III above.

#### B. BIDDER STAFF ORGANIZATION

Each proposal shall explain the bidder's staff organization and responsibility hierarchy of staff to be assigned to the 2022AS RFP. Please note the duration of the 2022AS RFP when developing organization and assignments. Such assignments and responsibilities shall be broken down and described by task. The bidder shall highlight illustrations of relevant prior experience on similar projects.

#### C. REQUIRED SUBMITTALS

Detailed response containing:

1. Bidders must provide a cost proposal that includes all-inclusive fixed costs for each task in the detailed scope of work by pricing area, as specified in **Attachment D – Bidder Pricing Proposal**.
2. A complete narrative of the bidder's assessment of the work to be performed, the bidder's ability and approach, and the resources necessary to fulfill the requirements of this RFP. This should demonstrate the bidder's understanding of the IE's performance expectations. Clearly indicate any options or alternatives proposed.
3. A specific point-by-point response by task number (e.g., "A1"), in the order listed in the detailed scope of work, to each requirement in the RFP.

4. Bidder must provide experience with production costs models and an initial assessment and critique of PacifiCorp's scoring methods and computer models (Plexos) to be utilized with the 2022AS RFP as described in **Attachment C – PacifiCorp's Proposed 2022AS RFP Bid Evaluation and Selection Process** specifically on its consistency with PacifiCorp's 2021 IRP modeling process and the Washington rules addressing the evaluation criteria.<sup>21</sup> If selected, bidders will have further opportunity to provide additional detail under Scope of Work A.1.a Design of the RFP.
5. Qualification and expertise of staff proposed for this project.
6. Experience and competence in assessment, evaluation and monitoring related to competitive bidding for renewable and non-renewable resource supplies that may or may not include a BESS or energy storage. Bidder should document experience with assessing PPAs, BTAs, and tolling agreements. Such experience should include evaluating power supply alternatives including production cost modeling to evaluate cost and risk.
7. Experience and competence in assessment, evaluation and monitoring related to competitive bidding for demand-side resources including demand response and conservation and energy efficiency resources.
8. Experience and competence in assessment, evaluation and monitoring related to equity criteria such as workforce standards required by municipal and California utilities.
9. Experience and competence in assessment, evaluation and monitoring related to competitive bidding for supplies within the Western Electric Coordinating Council (WECC).
10. Demonstrated knowledge of existing or anticipated renewable portfolio standards within the WECC.
11. Experience evaluating a competitive bidding process that involves examination of interconnection studies issued in accordance with Open Access Transmission Tariff (OATT) interconnection processing rules common to vertically integrated utilities that are outside organized markets, and "first-ready first-served" interconnection cluster study processing alternatives.<sup>22</sup>
12. Work samples demonstrating such expertise and competence, including work samples demonstrating the bidder's willingness and ability to work independent of utilities and to rigorously review, evaluate, and critique utility RFPs for supply-side resources such as renewable or thermal energy resources including storage and also demand-side resources such as conservation and demand response.
13. Performance references for similar IE projects with other utilities.
14. Use of electronic platform for management of bid submittal, communication, and documentation of evaluation.
15. Bidders must declare any conflicts of interest by identifying any conflict, or potential conflict of interest that might arise during the course of the project.
16. Disclose any past, current or anticipated future relationship with or work for PacifiCorp or any affiliate, and any public utility regulatory agency in any of the states served by PacifiCorp. This disclosure should specify the date, nature and scope of any such relationship or work.

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<sup>21</sup> See WAC 480-107-035(1), WAC 480-107-035(4), and WAC 280-107-045.

<sup>22</sup> See PacifiCorp's Open Access Tariff Section 38.4.1.

## D. COST PROPOSAL REQUIREMENTS

The information requested in this section will be used by the Commission Staff to evaluate the reasonableness of the overall project price quotation. The bidder must estimate the major cost categories and hours associated with each task.

**As a minimum requirement, each proposal shall contain the following:**

1. Personnel costs, itemized and broken down by:
  - a. personnel category (i.e. project manager etc.),
  - b. names of personnel in each category to be used,
  - c. estimated hours for each task,
  - d. rates per hour for each person, and
  - e. subtotal for personnel cost.
2. Itemized cost of materials, supplies and copies and a subtotal for these elements.
3. Fully itemized transportation and related costs to be used as needed, itemized and broken down by at least:
  - a. travel,
  - b. lodging,
  - c. meals and other costs, and
  - d. subtotal for transportation and related costs.

## V. PROPOSAL REQUIREMENTS AND SUBMISSION

### A. QUESTIONS

Interested parties and bidders may submit questions related to this solicitation, and PacifiCorp will respond in a timely fashion. All information, including pre-bid materials, questions, and PacifiCorp's response to questions, will be posted on the PacifiCorp website at [www.pacificorp.com](http://www.pacificorp.com). Any questions on the IE RFP or related documents should be sent to Company via email at [rfp\\_IE@pacificorp.com](mailto:rfp_IE@pacificorp.com).

### B. SUBMISSION OF BIDS

One (1) proposal with a digital signature submitted electronically to [rfp\\_IE@pacificorp.com](mailto:rfp_IE@pacificorp.com), must be submitted electronically and received to the email address below and received no later than **5:00 PM Pacific Prevailing Time on Thursday September 23, 2021**. Proposals received after this time and date will not be accepted and returned to the bidder.

**Email: [rfp\\_IE@pacificorp.com](mailto:rfp_IE@pacificorp.com)**

## VI. SCORING CRITERIA

From the information submitted in accordance with Article V, proposal contents, and client references, the evaluation committee (see Article VIII) will score proposals based upon the following:



#### A. ABILITY OF BIDDER TO PERFORM PROPOSED WORK (300 POINTS)

Maximum of three hundred (300) points. Demonstrated training, experience and ability of the bidder and its individual staff member(s) that will be assigned to the project to perform the proposed work, including, but without limitation:

1. Understanding of the scope of work and deliverables, as shown by IE's description of the tasks in its deliverables, understanding of the functions to be performed, and experience evaluating another type of energy supply, renewable resource, demand-side resource RFP or other related experience within the WECC. (50 points)
2. Specific experience reviewing an RFP for renewable and non-renewable resources, including experience with evaluating benchmark and market bids. (100 points)
3. Experience evaluating storage options including batteries or other types. (100 points)
4. Experience evaluating equity criteria such as workforce requirements. (50 points)

#### B. ABILITY OF BIDDER TO PERFORM PROPOSED WORK (350 POINTS)

Maximum of three hundred and fifty (350) points. Demonstrated training, experience and ability of the bidder and its individual staff member(s) that will be assigned to the project to perform the proposed work, including, but without limitation:

1. Bidder's experience with utility applications of production cost modeling specific to renewable generating resources and demand-side bids as part of an RFP (100 points).
2. Bidder's experience with PacifiCorp's current OATT that covers its "first-ready, first-served, cluster" interconnection study processing (100 points).
3. Initial assessment and critique of the scoring methods and computer models as described in **Attachment C – PacifiCorp's Proposed 2022AS RFP Bid Evaluation and Selection Process** (150 points).

#### C. PRICE PROPOSAL (300 POINTS)

Maximum of three hundred (300) points. **Attachment D – Bidder Pricing Proposal** will be the basis for evaluation of Bidder's proposal on the cost of the project, the overall elements of that cost and the overall appropriateness of the cost in relation to the project as proposed.

1. The cost of the project, the overall elements of that cost. (150 points)
2. The overall appropriateness of the cost in relation to the project as proposed. (150 points)

#### D. CONFORMITY TO PROPOSED PROFESSIONAL SERVICES CONTRACT (50 POINTS)

Maximum of fifty (50) points. IE bidder to provide redline and comments to **Attachment E – Professional Services Contract**.

### VII. PROCESS SELECTION

#### A. EVALUATION

1. Initial Review: PacifiCorp will review all proposals to help ensure that all prescribed provisions and procedures have been met. Proposals that do not meet all prescribed mandatory qualifications, solicitation procedures and requirements may be rejected and eliminated from the selection process. Proposals meeting the prescribed solicitation procedures and requirements will be reviewed by PacifiCorp and graded against the scoring criteria which will then be summarized for Commission staff.

2. Evaluation Process: After PacifiCorp has reviewed, graded and ranked proposals, PacifiCorp will meet with Commission staff to discuss the leading candidate for recommendation to the Commission.
3. Scoring: The entities or individuals submitting the highest scoring proposals shall be recommended to the Commission for its consideration.
4. Recommendation to Commission: Staff will issue a memo prior to the Commission public meeting, with its recommendation on the Company's application for approval of a Washington IE for PacifiCorp's 2022AS RFP.
5. Commission's ultimate discretion in approving IE: The Commission will consider Staff's recommendation and comments from PacifiCorp and non-bidding parties in selecting the IE, but the ultimate discretion to approve the Company's selection of an IE lies with the Commission. Upon the Commission granting the Company's petition for approval of its recommended IE, PacifiCorp will enter into a contract with the selected IE.

#### B. SELECTION NOTIFICATION

PacifiCorp will notify every bidder of its selection status.

### VIII. CONTRACT INFORMATION

#### A. PROFESSIONAL SERVICES CONTRACT

1. The selected bidder will be required to enter into a professional services contract with PacifiCorp based on the scope of work described herein and in a form substantially similar to the form attached to this RFP in **Attachment E**. Commission staff will review the draft PacifiCorp contract prior to execution to ensure that it conforms to this solicitation and the Commission's competitive bidding rules.
2. The State of Washington will not be a party to the resulting contract and will not be responsible for any conflicts that arise between PacifiCorp and the selected IE.

**ATTACHMENT A**  
**PACIFICORP'S PROPOSED 2022AS RFP TIMELINE**

The table below contains PacifiCorp's proposed indicative 2022AS RFP schedule. *Dates are in 2022 and 2023 are approximate and subject to change.*

Milestone	Process	Date	Day of Week
2021 IRP filed	IRP	09/01/2021	Wednesday
Open OR RFP Docket - Notify Oregon parties of RFP and IE need	OR Docket	09/02/2021	Thursday
Notify Washing parties of RFP and IE need	WA Docket	09/02/2021	Thursday
File notice of RFP with UT Commission - IE need	UT Docket	09/02/2021	Thursday
Issue IE RFP for OR	OR Docket	09/03/2021	Friday
Issue IE RFP for WA	WA Docket	09/09/2021	Thursday
OR IE bids due	OR Docket	09/17/2021	Friday
WA IE bids due	WA Docket	09/23/2021	Thursday
WA Commission approval of IE and evaluation and scoring methodology	WA Docket	09/30/2021	Thursday
OR Commission public meeting approving IE	OR Docket	10/05/2021	Tuesday
Pre-issuance RFP bidder's conference Utah	UT Docket	10/05/2021	Tuesday
File notice to bidders on RFP schedule and timeline	UT Docket	10/05/2021	Tuesday
Oregon IE files comments on draft RFP	OR Docket	TBD	TBD
File <b>final</b> draft RFP with OR Commission	OR Docket	10/18/2021	Monday
File <b>final</b> draft RFP Application for UT	UT Docket	10/20/2021	Wednesday
File <b>final</b> draft RFP with WA Commission	WA Docket	10/22/2021	Friday
Oregon party comments on final draft RFP	OR Docket	10/25/2021	Monday
PacifiCorp reply comments on final draft RFP	OR Docket	11/02/2021	Tuesday
Oregon IE files report on final draft RFP	OR Docket	11/05/2021	Friday
Oregon Commission Staff files memo on RFP	OR Docket	11/19/2021	Friday
Oregon Party comments on Staff memo	OR Docket	12/03/2021	Friday
RFP Comments due from WA interested persons	WA Docket	12/06/2021	Monday
UT stakeholder party comments on RFP draft	UT Docket	12/04/2021	Saturday
WA Commission approval of RFP	WA Docket	01/06/2022	Thursday
UT IE comments on RFP due	UT Docket	12/14/2021	Tuesday
PacifiCorp comments on RFP due	UT Docket	12/29/2021	Wednesday
OR Commission Issues Written Decision Approving Final RFP	OR Docket	01/07/2022	Friday
UT Commission decision on RFP	UT Docket	01/07/2022	Friday
RFP Issued to market	2022 AS RFP	01/10/2022	Monday
IE joint discussion on models and assumptions	2022 AS RFP	01/11/2022	Tuesday
Provide models and assumptions to UT IE & DPU	UT Docket	01/11/2022	Tuesday
Provide models and assumptions to OR IE	OR Docket	01/11/2022	Tuesday

Provide models and assumptions to WA IE	WA Docket	01/11/2022	Tuesday
1st bidder's conference - Utah	UT Docket	01/13/2022	Thursday
All party / PacifiCorp's reply comments due for UT	UT Docket	01/12/2022	Wednesday
Notice of Intent to Bid due	2022 AS RFP	01/24/2022	Monday
Last day for RFP questions to IEs for Q&A	2022 AS RFP	02/07/2022	Monday
Benchmark bids due	2022 AS RFP	02/07/2022	Monday
RFP bids due	2022 AS RFP	02/15/2022	Tuesday
Benchmark bid evaluations complete	2022 AS RFP	02/21/2022	Monday
Bid eligibility screening completed	2022 AS RFP	02/28/2022	Monday
Post bid summary to public website	WA Docket	03/16/2022	Wednesday
OR IE files status report on bid scoring	OR Docket	03/07/2022	Monday
PacifiCorp OATT - Cluster Request Window opens	OATT	04/01/2022	Friday
Initial bid scoring/ranking completed - for inclusion in IRP model analysis	2022 AS RFP	04/05/2022	Tuesday
IRP modeling generates ISL	2022 AS RFP	05/06/2022	Friday
IEs' review of ISL completed	2022 AS RFP	05/12/2022	Thursday
PacifiCorp notifies bidders selected to ISL	2022 AS RFP	05/13/2022	Friday
ISL bidders notify Pac Trans to enter cluster study	2022 AS RFP	05/16/2022	Monday
PacifiCorp OATT - Cluster Request Window closes (deadline)	OATT	05/16/2022	Monday
PacifiCorp OATT - Customer Engagement Window closes (deadline)	OATT	06/15/2022	Wednesday
Capacity factor and BESS evaluation on ISL started	2022 AS RFP	06/30/2022	Thursday
OPUC Special Public Meeting on sensitivities	OR Docket	07/14/2022	Thursday
Capacity factor and BESS evaluation on ISL completed	2022 AS RFP	10/18/2022	Tuesday
Cluster study results posted to OASIS / bidders notified by Pac Trans	OATT	11/12/2022	Saturday
Pac Trans meetings with cluster study participants	OATT	11/22/2022	Tuesday
Bidders provide ISL price update including cluster study results	2022 AS RFP	12/02/2022	Friday
Bidders provide resource production update	2022 AS RFP	12/02/2022	Friday
Submit updated bids to IRP modeling	2022 AS RFP	12/09/2022	Friday
IRP modeling generates Final Shortlist (FSL)	2022 AS RFP	01/06/2023	Friday
Final Shortlist (FSL) selected	2022 AS RFP	01/10/2023	Tuesday
IEs' review of FSL Completed	2022 AS RFP	01/17/2023	Tuesday
OR IE files status report on sensitivity analysis	OR Docket	01/19/2023	Thursday
Final Shortlist filed with OR Commission for acknowledgement	OR Docket	01/24/2023	Tuesday
Winning Bids filed with UT Commission	UT Docket	01/24/2023	Tuesday
OR IE Files RFP Closing Report	OR Docket	01/31/2023	Tuesday
OR Party Comments on IE Closing Report	OR Docket	02/20/2023	Monday
OR Commission Public Meeting acknowledging FSL	OR Docket	03/23/2023	Thursday
OR Commission FSL Acknowledgement Order	OR Docket	03/27/2023	Monday



**ATTACHMENT B**  
**WASHINGTON ELECTRIC COMPANIES –**  
**PURCHASES OF RESOURCES RULES**

**[Provided as a separate attached document]**

**ATTACHMENT C**  
**PACIFICORP'S PROPOSED 2022AS RFP BID EVALUATION AND SELECTION**  
**PROCESS**

**[Provided as a separate attached document]**

## ATTACHMENT C-1

### 2021 IRP Preferred Portfolio Incremental Resources

Year	MW	Type	From	To	Description
2026	615	Wind	Within Willamette Valley OR Transmission Area		Enables 615 MW of interconnection: Albany, OR area reinforcement
2026	130	Wind	Portland North Coast	Willamette Valley	Enables 2080 MW of interconnection with 1950 MW TTC. Portland Coast area reinforcement, Willamette Valley and Southern Oregon
2026	600	Solar plus storage	Borah-Populous	Hemingway	Enables 600 MW interconnection with 600 MW TTC: B2H Boardman-Hemingway



**ATTACHMENT D**  
**BIDDER PRICING PROPOSAL**

**Washington Independent Evaluator for PacifiCorp’s 2022AS Request for Proposal**

Company: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Contact: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

***Pricing for this RFP shall be defined into five (5) areas. Bidder shall provide fixed pricing by area. Pricing shall account for 40% of overall score for each proposal.***

**ALL PRICING SHALL BE FIXED AND PROPOSED IN TOTAL DOLLARS**

**SCOPE OF WORK**

**Area One (1): RFP Design**

- A.1** **IE Assessment of PacifiCorp’s RFP Design**
- A.1.a *Review of initial draft RFP and stakeholder comments*
- A.1.b *Assessment of final draft RFP filed with Commission*
- A.1.c *Joint discussion with Oregon, Washington and Utah's independent evaluator*

**Area Two (2): Monitoring and Validation of RFP Process**

- B.6 **Monitor all aspects of solicitation process**  
*Monitor the solicitation process, discussions with bidders and contract negotiations through any acknowledgement of the final shortlist.*
- Audit and Validation**
- B.4, 7, 10, 12 *Audit and validation of RFP screening and evaluation process including inputs, assumptions and modeling.*
- B.8 **Verification of RFP Initial Shortlist**
- B.8.a *Verify that price score calculated appropriately for product, technology and methodology.*
- B.8.b *Verify that non-price score calculated appropriately per PacifiCorp's IRP Action Plan and bidder can reasonably self-calculate it non-price score.*
- B.9 **Verification of RFP Final Shortlist**

- B.9.a *Verify the impact of PacifiCorp Transmission cluster-study on Final Shortlist selection*
- B.9.b *Verify modeling results of Final Shortlist modeling on overall system costs and risks*
- B.9.c *Verify that non-price score calculated appropriately per PacifiCorp's IRP Action Plan and that individual bidders can reasonably self-calculate its own non-price score.*

**Area Three (3): PacifiCorp RFP Bid Scoring**

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***Pricing to be calculated based on quantity of bids received by PacifiCorp and that conform to RFP minimum eligibility requirements.***

- B.11 *Independently score market bids and benchmark resource bids, if any*
- B.13 *Compare IE and PacifiCorp scoring*

Quantity of bids

*Provide fixed pricing per submitted bid for each quantity of bids. Note: A submitted bid includes all bid alternatives, if any.*

Up to One Hundred (100) Bids	
Over One Hundred Bids	

**Area Four (4): Reporting and Presentations**

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A.2 Reports to be prepared and provided to Commission

- A.2.a *Final Draft RFP Assessment*
- A.2.b *Bid Scoring Report*
- A.2.c *Final Short List Sensitivity Analysis Report*
- A.2.d *Closing Report*

Communication and Presentations

- B.1, 2, 3, 5, 14, 15 *Status Reports to Commission Staff and PacifiCorp. Participate in activities, confer with Commission Staff and PacifiCorp, and attend Commission meetings and present information as required.*

**ATTACHMENT E**  
**DRAFT COPY**  
**PACIFICORP PROFESSIONAL SERVICES CONTRACT**