

***Puget Sound Energy
(PSE)***

REQUEST FOR PROPOSAL:

***BIENNIAL CONSERVATION ACHIEVEMENT REVIEW
(BCAR)
OF
PSE'S 2022-2023
ELECTRIC AND NATURAL GAS CONSERVATION PORTFOLIO***

May 9, 2022

Proposals due June 3, 2022 (5:00 PM, Pacific Time) to cemrfp@pse.com.

TABLE OF CONTENTS

- 1.0 Introduction and Background
- 2.0 Purpose of this Request for Proposal (RFP)
- 3.0 Conservation Resources Advisory Group (CRAG)
- 4.0 Description of the 2020-2021 Electric and Natural Gas Conservation Targets and Portfolio
- 5.0 Scope of Project
- 6.0 Qualifications Requirements of Consultants
- 7.0 Pricing
- 8.0 Supplier Diversity Questions
- 9.0 Information to Submit in Proposal to Respond to this RFP
- 10.0 Independent Nature of the Review
- 11.0 Timeline
- 12.0 Submittal of Proposals
- 13.0 Inquiries
- 14.0 Modifications or Withdrawal of Proposal
- 15.0 Process for Selection and Basis of Any Awards
- 16.0 Pre-award Expenses
- 17.0 Rights

Attachments:

- A. Order 01, WUTC Docket No. UE-210822, and Attachment A
- B. Order 01, WUTC Docket No. UG-210823 and Attachment A
- C. WAC Rules 480-109
- D. PSE 2022-2023 Biennial Conservation Plan (BCP) Overview
- E. Measure Revisions Guidelines Version 7.25
- F. PSE 2018-2019 BECAR Final Report
- G. PSE BECAR 2020 Mid-Cycle Report
- H. BCAR and ERR Matrix

- I. PSE Master Services Agreement
- J. Addendum for Security Requirements – Consultant
- K. SOW – Long Form
- L. 2022-23 BCAR Pricing Sheet
- M. Supplier Diversity Information Request
- N. Small and Diverse Supplier Self-Certification Form
- O. Mutual Nondisclosure Agreement

By execution of this form of proposal, the Bidder agrees to furnish all elements necessary to complete the project in compliance with the provisions and documents included in this Request for Proposal (RFP) package. Provide full description of each service offered, including cost to customer.

All costs associated with participation in this RFP process are the sole responsibility of the respondent.

REQUEST FOR PROPOSALS
Biennial Conservation Achievement Review of
PSE's 2022-2023 Electric and Natural Gas Conservation Program Portfolio
Scope of Work/ Proposal Instructions

1.0 Introduction and Background

On January 18, 2022, the Washington Utilities and Transportation Commission (“WUTC” or “Commission”) issued Order 01 in Docket UE-210822 (Attachment A) approving Puget Sound Energy’s (“PSE”) 2022-2023 biennial electric conservation target subject to conditions, in compliance with the electric energy conservation portfolio standard required by the Washington Energy Independence Act (“EIA”, codified as RCW Chapter 19.285). The Order establishes the terms under which PSE has agreed to operate its electric energy efficiency programs. Condition 6) d in the Order requires PSE to conduct an independent third-party review of the electric energy savings reported by PSE for the 2022-2023 biennium:

6) d) An independent third-party must review portfolio-level electric energy savings reported by PSE for the 2022-2023 biennial period, from existing conservation programs operated during that period, per WAC 480-109-120(4)(b)(v). The review will be funded by the PSE Electric Conservation Service Rider. The review will be managed jointly by Commission staff and PSE staff with input on the scope, cost, RFP development, reviewer selection and ongoing oversight by the Advisory Group. The independent third-party reviewer must be selected through an RFP process and is intended to:

- i. Verify the calculation of total portfolio MWh savings; and*
- ii. Provide a review of EM&V activities and application for best practices and reasonable findings, which includes the following:*
 - (1) Validate the adequacy of PSE's savings verification process, controls and procedures;*
 - (2) Validate savings tracking and reporting processes and practices;*
 - (3) Review program process and impact evaluations completed during the biennium for appropriateness of evaluation approach/methodologies (program specific) and program cost-effectiveness calculations.*

On January 18, 2022, the Commission also issued Order 01 in Docket UG-210823 (Attachment B) approving PSE's 2022-23 biennial natural gas conservation target subject to conditions, in compliance with the natural gas energy conservation portfolio standard required by RCW Chapter 80.28.380. The Order established the terms under which PSE has agreed to operate its natural gas energy efficiency programs. Condition 5) c) ii.) 5 in the Order requires PSE to conduct an independent third-party review of the natural gas energy savings reported by PSE for the 2022-2023 biennium:

The biennial conservation report must include... [a]n independent third-party evaluation of portfolio-level biennial conservation savings achievement.

This Request for Proposals is for completion of the Biennial Conservation Achievement Review (“BCAR”) of PSE's electric and natural gas conservation achievements. Previous reviews covering the 2010-2011 and 2012-2013 biennia were extensive in scope, including detailed audits of program tracking data and savings calculations, on-site inspections of measure installation, review of program evaluation studies, and checks of cost-effectiveness and avoided cost calculations. Based on the experience and results of these previous biennial reviews, the 2014-2015, 2016-2017, 2018-2019 and 2020-2021 BECARs¹ had a more focused scope of work. Prior to the 2022-2023 biennium, a third-party portfolio review was only required for the electric portfolio. The 2022-2023 BCAR will have a similar,

¹ Prior to the 2022-2023 program cycle, the conservation achievement review was referred to as the “Biennial Electric Conservation Achievement Review (BECAR).”

focused scope as more recent BECARs, but will include a high-level portfolio review of the natural gas conservation savings achievement as well.

The Commission Orders, conditions, and PSE's 2022-2023 Biennial Conservation Plan for Dockets UE-210822 and UG-210823 can be found on the WUTC website at:

<https://www.utc.wa.gov/casedocket/2021/210822>

<https://www.utc.wa.gov/casedocket/2021/210823>

The 2020 and 2021 Annual Reports of Conservation Accomplishments including recent Program Evaluations are posted in Dockets UE-190905 and UG-190913 and can be found on the WUTC website at:

<https://www.utc.wa.gov/casedocket/2019/190905>

<https://www.utc.wa.gov/casedocket/2019/190913>

For further reference, the following attachments have been provided:

Attachment A, WUTC Docket No. UE-210822,

Attachment B, WUTC Docket No. UG-210823,

Attachment C, WAC Rules 480-109,

Attachment D, PSE 2020-2021 Biennial Conservation Plan (BCP) Overview. The BCP contains the savings targets, budgets, and program descriptions for all of PSE's conservation offerings. The supporting exhibits to the BCP are not attached due to their size, but may be found at the link to the WUTC website provided above.

Attachment E, Exhibit 8, Supplement 3: Guidelines for Measure Revisions, Version 7.25, May 2019,

Attachment F, Puget Sound Energy 2018-2019 BECAR Final Report, May 11, 2020,

Attachment G, Puget Sound Energy BECAR 2020 Mid-Cycle Report, October 28, 2021,

Attachment H, BCAR and ERR Matrix, April 2022

Attachment I, Master Services Agreement

Attachment J, Addendum for Security Requirements – Consultant

Attachment K, SOW – Long Form

Attachment L, 2022-23 BCAR Pricing Sheet,

Attachment M, Supplier Diversity Information Request

Attachment N, Small and Diverse Supplier Self-Certification Form

Attachment O, Mutual Nondisclosure Agreement

2.0 Purpose of this Request for Proposal (RFP)

PSE issues this RFP to seek a qualified firm or team of firms to complete an objective, independent review of the electric and natural gas conservation savings that PSE reports in 2022-2023, in response to the Commission's directive above. The selected Consultant will complete the review at the direction of PSE and Commission Staff, with further input and oversight provided by PSE's Conservation

Resources Advisory Group (see Section 3.0). The 2022-2023 BCAR final report is to be completed by no later than May 20, 2024.

The primary purpose of the 2022-2023 BCAR is to assess the extent to which PSE's reported electric and natural gas energy savings were achieved. This review is limited to those existing electric and natural gas conservation programs that PSE will operate in 2022 and 2023 and which are the basis for the electric and natural gas energy savings that PSE will report for that two-year period. The scope of this review is further described in Section 5.0.

3.0 Conservation Resources Advisory Group (“CRAG”)

The selected Consultant will conduct the review under the direction of PSE and the Commission Staff, with input and oversight from the CRAG. The CRAG consists of the following stakeholder groups. The responsibilities of the CRAG are described in WAC 480-109 (Attachment C), pages 11-12.

The CRAG currently consists of the following organizations:

- Commission Staff (website). The Energy Section Staff supports the three-member Commission in the regulation of investor-owned utilities. The Staff operates independently of Commissioners in litigated matters, such as rate cases.
- Public Counsel’s Office of the Attorney General of Washington (website). Public Counsel represents the interests of residential and small commercial customers in matters before the Commission.
- Northwest Power and Conservation Council (website). This regional electric policy and planning agency was established by Congress and is responsible for producing an electric generation resource and conservation plan for the Pacific Northwest region (Washington, Oregon, Idaho, and western Montana).
- Northwest Energy Coalition (website). NVEC represents an alliance of organizations promoting renewable energy and conservation in the Pacific Northwest.
- Opportunity Council/The Energy Project (website). This organization represents low-income customers and community action agencies before the Commission.
- Alliance of Western Energy Consumers (website). AWEC represents the interests of industrial customers in matters before the Commission.
- Washington State Department of Commerce (website). The Department of Commerce is responsible for general state energy policy, administration of many state-funded energy programs, and other functions typical of a state energy office.
- Northwest Energy Efficiency Council (website). NEEC represents energy efficiency vendors, installers, and other trade allies.
- Customer Representatives. Customer representatives have periodically served on the CRAG at their discretion, including Microsoft, Boeing, Kemper Development, and King County.

4.0 Description of the 2022-2023 Electric and Natural Gas Conservation Targets and Portfolio

PSE offers its customers a broad range of programs and measures, across all of its customer classes, with a Commission-approved target of achieving at least 469,182 MWh of electric energy savings and 9,262,931 Therms of natural gas savings during the 2022-2023 biennium² (see Attachment A, page 3, and Attachment B, page 3), and these targets are the threshold for the Company to avoid financial

² The Total Two-Year Utility Electric and Natural Gas Conservation Goals are, respectively, 536,717 MWH and 9,791,327 Therms. The difference between these figures and the EIA Penalty Threshold represent the decoupling threshold and additional savings PSE believes it can achieve during the 2022-2023 biennium.

penalties. Savings achieved through the Northwest Energy Efficiency Alliance (NEEA), retail wheeling customers, and pilot programs with uncertain savings are not included in this target and are therefore outside the scope of this requested review.

Each of PSE's programs is established by a set of tariff schedules approved by the WUTC. Programs are generally divided into two groups: Residential Energy Management and Business Energy Management. PSE reports its progress toward achieving its savings target on an annual basis to the Commission, usually by April 1 for the previous calendar year. The reports also describe PSE's program offerings, expenditures, and cost-effectiveness results.

PSE must use electric unit energy savings values and standard protocols approved by the Regional Technical Forum ("RTF") ([website](#)) or from other sources based on generally accepted methods, impact evaluation data, or other reliable and relevant data, and which were presented to the CRAG to review. (WAC 480-109-100(5), see Attachment C). Many Residential Energy Management programs, as well as a portion of Business Energy Management programs, use the RTF's deemed Unit Energy Savings (UES) values. The application of RTF values is explained in Attachment D, page 49, under Exhibit 4: Prescriptive Measures.

All energy savings are reported and evaluated on a gross basis, meaning freeridership and spillover are not considered. Program evaluations are conducted on an annual schedule such that all major programs are evaluated at least once every four years. All evaluation studies include an Evaluation Response Report ("ERR") describing all follow-up actions that PSE proposes to take in response to the evaluation findings. Completed evaluations are included with the Annual Conservation Report filed with the Commission. The company's 2022-2023 Evaluation Plan is included as Exhibit 6 to the BCP (use links to WUTC dockets UE-210822 and UG-210823 above).

5.0 Scope of Project

The review will address questions and issues relevant to the objectives identified in Section 2.0. Tasks shall include, but are not limited to the items listed below in this section. Consultant is encouraged to organize, combine, and integrate the items in this section or propose new items to most effectively and efficiently meet the objectives in Section 2.0.

To accomplish these objectives, the scope of the 2022-2023 BCAR shall include the following tasks:

1. For electric conservation measures, review deemed Unit Energy Savings (UES) values used by PSE for reasonable consistency, based on data and standard practices at the time the values were developed and approved, with the requirements of WAC 480-109-100 (Attachment C) and the policy on application of RTF and non-RTF values (Attachment E). Determine if PSE's application of deemed savings values are consistent with the requirement as applied to the:
 - o Selection and application of RTF UES values.
 - o Derivation and application of non-RTF UES values.
 - o If necessary, recommend adjustments to UES methodologies or values.
2. For electric and natural gas conservation portfolios, audit of total portfolio electric energy savings reported by PSE for consistency with tracking system data. Task elements include:
 - o Determine whether reported savings match tracking system data.
 - o Further investigate irregularities or discrepancies to determine causes and, if necessary, recommend corrections or adjustments to reported savings.
 - o Program years 2022 and 2023 will be audited separately after PSE's Annual Conservation Report is filed with the Commission (by April 1 of each year).
3. Review Company actions taken in response to recommendations from 2020-2021 BECAR (see Attachments F, G and H). Task steps include:
 - o Determine reasonableness of action/response relative to the magnitude of the issue and standard industry practice, paying particular attention to findings and recommendations regarding PSE program/measure verification practices.

- Identify any recommendations that were not adequately addressed and propose follow-up actions.
4. Assess whether the company has undertaken follow-up actions on program evaluation studies based on the Evaluation Report Responses included with each completed program evaluation not yet reviewed in previous BECAR reports or reviewed by previous BECARs, but not yet addressed by PSE (see UTC docket links in Section 1 and Attachments F, G, and H). Additional Evaluation Report Responses completed during the contract period shall also be reviewed by the BCAR consultant provided they are filed prior to January 1, 2024. Evaluation Report Responses are provided by PSE and address recommendations made by independent third-party evaluators regarding specific PSE conservation programs. (Note: The results of program evaluation studies are used on a going-forward basis, not applied retroactively to reported savings achievements.)
- Determine reasonableness of action/response relative to the magnitude of the issue and standard industry practice, paying particular attention to findings and recommendations regarding PSE program/measure verification practices.
 - Identify any recommendations that were not adequately addressed and propose follow-up actions.
5. Review in more detail the energy savings of some programs or measures selected in consultation with PSE, Commission Staff, and the CRAG. This review may include sampling of project files, surveys, on-site inspections, modeling or engineering analysis. The number of programs or measures selected should be limited and based on the following criteria:
- Programs or measures with significant adverse findings from the 2020-2021 BECAR or program evaluations completed in 2020 or later. Vendor will make recommendations as to what would constitute “significant adverse findings.”
 - New programs or measures, not including pilots, which contributed energy savings in 2020-2021, but have not been previously reviewed or evaluated.
 - Existing programs that have changed substantially, such that previous reviews or evaluation results no longer apply.
 - Any other program or measure where, in the Consultant’s judgment, there is significant uncertainty about the level of reported program savings.

The Guidelines for Measure Revisions (Attachment E), describes in detail, including examples, when a finding would result in a retroactive correction or going-forward adjustment. It is critical to distinguish between these two types of findings:

Corrections: These include mathematical errors, reporting errors, selection of an incorrect measure, misapplication of RTF UES values, or measure savings reporting made without substantiating documentation archived in the Source of Savings database. Corrections are applied immediately and retroactively to when the error commenced, or January of the reported year, whichever is appropriate, upon discovery.

Adjustments: These apply to measure savings that have a business case or source of savings documentation in the Source of Savings database. Adjustments occur when RTF values are revised or non-RTF savings calculation methods and assumptions change, and these changes have been reviewed with the CRAG. Adjustments are made annually and are not retroactive. Revisions to RTF and non-RTF UES values that are made January 1 - September 1 of a current program year will be applied on January 1 of the following year. Adjustments made September 2 – December 31 will be applied two (2) January’s hence.

Therefore, Task 1 Review of Deemed UES Values must be completed by September 1, 2022, so that any revisions can be incorporated in 2023. Any UES values adopted after September 1, 2022 will be outside the scope of this review because they will not be effective in the 2022-2023 biennium. The savings revision policy and its application are described in the Measure Revision Guidelines (Attachment E).

In any cases where the Consultant and PSE disagree on a finding after reasonable attempts to reach a mutual resolution, the Consultant and company shall ask the Commission staff and CRAG to provide guidance on how the issue should be resolved prior to inclusion in any interim or final report.

After initial review of PSE's electric program portfolio described in Attachment D, the Consultant is expected to prepare a detailed work plan for the BCAR, including any proposed detailed review of programs. A follow-up proposal for more detailed study of additional selected programs or measures may be submitted, after review of the results from PSE's 2022 Annual Conservation Report (usually filed by April 1, 2023) and consultation with PSE, Commission Staff, and the CRAG. Any recommendation for detailed review should include the rationale for selecting a particular program or measure, a description of the additional work to be done for each additional program or measure, a schedule for completion that is consistent with the overall project time frame, and any additional cost for this follow-up work not already included in the proposed price. At that time, a contract change order may be issued if PSE and Commission staff agree the additional work is needed.

The review will be implemented according to the schedule in Section 11.0. Interim memo-style reports will be expected upon completion of each task identified above. For Task 2, an interim report is only required for program year 2022. A final two-year report will cover the entire biennium. The final two-year report shall aggregate and synthesize the results for the major tasks described above, over the entire 2022-2023 biennium. The work on Task 2 will be highly dependent on the Annual Conservation Report results, which will be available by April 1st of 2023 and 2024, for program years 2022 and 2023 respectively.

PSE and Commission Staff recognize that the period between filing of the 2023 Annual Conservation Report (April 1, 2024) and the due date for the final two-year report is short. It is expected that the Consultant budgets time such that review and incorporation of 2023 program data can be accomplished in a time frame that permits completion of the final two-year report on schedule (see Section 11.0).

Task 4 requires a review of program evaluations completed in the previous biennium. Completed evaluation reports along with their associated Evaluation Report Response are included as Supplements to Exhibit 6 of PSE's Annual Report of Conservation Accomplishments posted to the UTC's website at the links provided in Section 1.0. Additional evaluation reports may be forthcoming.

It is important for the Consultant to develop a good understanding of the details of PSE's energy conservation programs, tracking systems and data, program evaluations, and previous BCAR/BECAR reports. This is best achieved by having the Consultant spend significant time virtually or on site to work directly with PSE staff. Consultants are encouraged to factor this into their proposals.

In order to facilitate project management, the Consultant will be expected to provide monthly project status reports.

PSE shall be responsible for providing all data required by the Consultant in a timely manner that is consistent with the project schedule described in Section 11.0.

The Consultant will be responsible for delivering draft and final reports that include the following elements:

- Executive summary
- Project objectives & scope
- Methodology
- Results and findings
- Conclusions and recommendations
- Appendices

6.0 Qualification Requirements of Consultants

Consultants submitting a proposal, including any subcontractors, shall meet the following qualifications:

- Familiarity with relevant issues and analytical methods; some understanding of the treatment of electric energy conservation savings in the Pacific Northwest region is desirable.
- Experience working with utility conservation program operations, tracking data, evaluation, and regulatory policy.
- A proven track record of success on similar projects.
- Familiarity and experience in working with multi-party advisory groups.

The Consultant is expected to be available to work extensively on-site and virtually with PSE data and staff. The Consultant will also be expected to present and discuss with the CRAG approximately three times throughout the process, as determined by the CRAG and PSE. It is anticipated that, at minimum, meetings will occur at the beginning of the project to discuss a work plan, and to present the draft results after each annual review. All work shall become the property of PSE regarding its use or distribution.

Consultant and subcontractors who have previous or current working history with PSE, the WUTC or CRAG member organizations shall disclose their involvement with each organization in their proposal, including a description and dates of work done since 2017.

If a Consultant or subcontractor has performed any conservation program delivery or evaluation work for PSE that is within the scope of this RFP, either as primary contractor or subcontractor, it will still be eligible to be awarded this project, provided that it identify all such work and include in its proposal a plan to mitigate any potential conflict of interest.

Multiple firms may partner to submit team proposals, with one firm identified as the primary Consultant.

The Consultant (primary and sub-contracted firms) selected will be required to sign PSE's Master Services Agreement for Professional Services, Information Security Addendum, Statement of Work, Confidentiality, and Non-Disclosure Agreement before beginning work.

7.0 Pricing

Only fixed cost proposals inclusive of all expenses will be considered, with the exception of the follow-up proposal for more detailed program or measure review (Task 5), which may be submitted later as described in Section 5.0. Invoicing and payment shall be scheduled to coincide with work actually performed. Invoices must conform to PSE Accounts Payable's requirements for appropriate form and content. Payment may be withheld for failure to produce deliverables in a timely manner. No mark-up of travel expenses is accepted. Please complete and return attached 2022-23 BCAR Pricing Sheet Spreadsheet (Attachment L) as part of your proposal.

8.0 Supplier Diversity Questions

Suppliers should provide answers to the Supplier Diversity Information Request (Attachment M) diversity questions as part of their submitted proposal. Suppliers may use the Small and Diverse Supplier Self-Certification Form (Attachment N) to self-certify if the supplier does not hold a diversity certification but meets diversity certification requirements. Responses are used for informational purposes and do not impact ranking and selection.

9.0 Information to Submit in a Proposal to Respond to this RFP

The written proposal shall fully address the scope of work and all other requirements described herein. Failure to meet this requirement may result in disqualification.

To be eligible for consideration, a proposal must be organized as follows:

1. Cover Page with the following summary information:
 - a. Name of Firm submitting proposal.
 - b. Address from which the primary consulting firm will be delivering the majority of services.
 - c. Point of contact for proposal, including name, e-mail and telephone number.
 - d. Total Cost of proposal.
 - e. The proposal shall include a statement that it will remain valid for acceptance for a period of sixty (60) days following the closing time stated in Section 11.0.
 - f. List of any subcontractors and their addresses from which they will be delivering services.
2. Bidder's Qualifications. Description of the extent to which the firm and any subcontractors are technically qualified to perform the work described above in Section 5.0, including the desired qualifications identified in Section 6.0.
3. Project Methodology/Approach. Describe the approach and methods to complete each task described in Section 5.0.
4. Project Schedule. A proposed timeline of key milestones and activities culminating in project completion, consistent with the schedule in Section 11.0. Describe any risks and contingencies that may affect your ability to meet the proposed timeline for project completion.
5. Pricing. Pricing must be on a Time and Materials basis not-to-exceed a capped amount with itemization of all expenses excepting any detailed review for Task 5 of the scope of work in Section 5.0 above. Use the tabs on the attached 2022-23 BCAR Pricing Sheet spreadsheet (Attachment L) to submit the following:
 - a. Itemize the project budget by task, identifying labor hours and rates for the primary firm. For all labor costs, please report the estimated number of hours and billing rate for each position. Other task categories should include: project planning, project management and reporting. Separately identify and itemize any subcontractor(s) and expenses in the same categories.
 - b. Itemize by project task estimated travel, lodging and other relevant expenses. Separately identify and itemize any subcontractor(s) and expenses in the same categories.
 - c. Separately provide a personnel rate sheet which should include position name (e.g. Project Manager, Senior Consultant, etc.), company, years of experience, education and hourly rate.
6. Previous and current work with PSE, WUTC, or members of the CRAG. Brief description of projects and dates for any engagements.
7. Potential Conflict of Interest and Mitigation Plan. Brief description of any current work with PSE that is within the scope of this project and proposed approach for addressing that work in the 2022-2023 BCAR.
8. Project Team Credentials. Identify who would work on the project, including lead author(s) and lead analysts, including descriptions of their qualifications.
9. References from at least three organizations that the Bidder has worked with in the last two years, for complex projects that are relevant to the scope of this RFP. Please include a contact name, title, e-mail address and phone number, as well as a brief description of the work performed and the date of that work.

- 10. Supplier Diversity Questionnaire:** Suppliers should provide answers to the diversity questions provided in the Supplier Diversity Information Request (Attachment M) and described in Section 8.0 as part of their submitted proposal.
- 11. PSE Governing Business Documents.** Please review the Master Services Agreement and Information Security Requirements Addendum, and reply in your RFP: Acceptance of Terms or Redline/comments attached.

PSE Governing Business Documents are:

All Bidders:

- Master Services Agreement (Attachment I)
- Addendum for Information Security Requirements—Consultant (Attachment J)

Only the Successful Bidder (To Be Determined [TBD]):

- Statement of Work – (Successful Bidder only) will work with PSE to complete/attach to contract (Attachment K)
- Mutual Non-Disclosure Agreement (NDA) (Attachment O)
- Certificate of Insurance

10.0 Independent Nature of the Review

The Consultant selected as a result of this RFP process will perform an objective, non-partisan study at the direction of PSE and Commission Staff, with advice from the CRAG. Nothing within the selection or contracting process for this RFP shall compromise this independence.

11.0 Timeline

The project will be completed according to the following schedule. PSE and Commission Staff may revise the schedule at any time, upon their mutual agreement and with input from the CRAG. The Consultant may be asked for input regarding the practical feasibility of any schedule modifications.

Date	Activity
May 9, 2022	RFP Release
May 16, 2022	All written Questions must be submitted by this date (5:00 PM, Pacific Time)
May 23, 2022	PSE responses to bidder questions
June 3, 2022	Proposals due from bidding firms (5:00 pm, Pacific Time)
June 13-17, 2022	Scheduled interviews with short-list vendors (TBD, Optional)
June 24, 2022	Selection of Consultant / Begin PSE contracting
July 1, 2022	Completion of contractual agreement process (MUST be completed prior to Project Kickoff)
July 4-8, 2022	Project Kickoff with PSE and Commission Staff
July 15, 2022	BCAR Work Plan
September 1, 2022	Task 1: Review of Deemed UES Values, Interim Memo

February 15, 2023	Task 3 Preliminary Review of Company Responses to 2020-2021 BECAR
February 15, 2023	Task 4 Preliminary Review of Company Actions in Response to Program Evaluations
April 3, 2023	Task 2: Audit of 2022 Portfolio Electric and Natural Gas Savings, Interim Memo
May 1, 2023	Draft Mid-Cycle BCAR Report
May 31, 2023	Final Mid-Cycle BCAR Report
August 1, 2023	Task 1: Review of Deemed UES Values, Final Memo
December 1, 2023	Task 3: Review of Company Responses to 2020-2021 BECAR Recommendations, Interim Report
February 1, 2024	Task 4: Review of Company Actions in Response to Program Evaluations, Interim Report
TBD	Task 5: Optional Deep-Dive Review of Selected Measures/Programs
April 15, 2024	Draft 2-Year BCAR Report
May 13, 2024	Final 2-Year BCAR Report

12.0 Submittal of Proposals

Please submit an electronic copy (Microsoft Word or Adobe Acrobat format) of your Proposal to the address listed below.

Electronic submittals to:

cemrfp@pse.com

The complete Proposal for the services identified under this RFP must be received per the Timeline. It is the responsibility of the Bidder to see that its Proposal is received by the date stated herein.

Include your company name and RFP name on the Subject line of the email submitting your proposal.

13.0 Inquiries

Bidders may submit inquiries regarding any aspect of this RFP, in writing at the following email address:

cemrfp@pse.com

All questions, responses and any other correspondence or communication will be logged and provided to Commission Staff and the CRAG. Non-proprietary questions and resulting responses will be provided to all bidders.

14.0 Modifications or Withdrawal of Proposal

Consultants may withdraw their proposals from consideration at any time, but no new proposals will be accepted after the Due Date specified in Section 11.0.

PSE and Commission Staff may, upon mutual agreement, modify any provision of the RFP at any time prior to the Due Date specified in Section 11.0 above. Any changes to the scope of work subsequent to the submission of a proposal by a Consultant will be submitted as an addendum to the original proposal. PSE and the Commission Staff may, upon mutual agreement, ask a Consultant to correct minor deficiencies in its proposal.

15.0 Process for Selection and Basis of Any Awards

PSE and Commission Staff, with input from the CRAG, will compare all proposals against all other proposals submitted under this RFP. The contract(s) will be awarded on the basis of proposals received and after consideration of the Consultant's ability to provide the required services, complete the project, quality of personnel, extent and quality of relevant experience, price and any other factors deemed pertinent. The criteria to be used for ranking proposals include the following:

- Comprehensiveness of proposal relative to all RFP requirements
- Quality and efficacy of proposed approach relative to project objectives, tasks, and mitigation of potential conflicts of interest
- Plans for working and communicating with PSE, Commission staff, and the CRAG
- Experience of Consultant team
- Ability to plan and manage completion of a complex project on time and within budget
- Appropriate level of effort/person-hours devoted to major tasks
- Total price
- Other factors deemed pertinent by PSE and Commission staff

As part of the proposal review process, PSE, Commission Staff, and members of the CRAG may conduct interviews with candidates. In the event a pre-award interview with the Consultant's key team members is required, the interviews will be scheduled in Bothell, Bellevue or Olympia. A webinar or conference call format may also be used.

16.0 Pre-award Expenses

All expenses incurred by the Consultant to prepare a proposal and participate in required pre-proposal and pre-award meetings, visits and the interviews shall be borne by the Consultant.

17.0 Rights

Subject to section 16.0, PSE and the Commission Staff reserve the right to reject any or all proposals, and to award multiple contracts, upon their mutual agreement and with input from the CRAG.