



**Regional
Technical Forum**

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REQUEST FOR PROPOSALS

Commercial and Industrial Sector Strategic Energy Management (SEM) Measure Research and Scoping April 11, 2024

I. Contracting Organizations

The Northwest Power and Conservation Council's (Council) Regional Technical Forum (RTF) is issuing this Request for Proposals.

A. The Council

The Council is an interstate compact agency formed by the states of Idaho, Montana, Oregon, and Washington as authorized by Congress in the Pacific Northwest Electric Power Planning and Conservation Act, 16 U.S.C. §839, et seq. The Council is composed of eight Council members, two appointed by the governor of each of the four states. Congress charged the Council with developing two major planning documents:

- A program for the protection, mitigation and enhancement of fish and wildlife affected by the development and operation of hydroelectric facilities in the Columbia River Basin, and
- A plan for meeting the electric energy needs of the Pacific Northwest for the next 20 years that includes an examination of conservation, renewable, and conventional energy sources that are available to meet those needs.

Congress also charged the Council with informing the Pacific Northwest public of major regional power issues and insuring widespread public involvement in the formulation of its regional power plan and fish and wildlife program.

B. The RTF

The RTF is an advisory committee to the Council. Per a congressional directive, the RTF was chartered in 1999 to:

- Develop standardized protocols for verification and evaluation of energy savings,
- Track regional progress toward the achievement of the region's conservation and renewable resource goals, and
- Provide feedback and suggestions for improving the effectiveness of conservation and renewable resource development programs in the region.

- Conduct periodic reviews of the region’s progress toward meeting its conservation and renewable resource goals.

II. Services Sought by the RTF

The RTF has been looking beyond the unit energy savings (UES) measure (i.e., widget-type measures) and working on whole building approaches, including the development of a [Guidance on Evaluated Energy Savings for Industrial SEM](#) document in July 2021. The RTF is seeking a contractor to support the exploration of SEM opportunities by reviewing and updating the guidance document, exploring the potential to develop a unit energy savings, standard protocol, or custom protocol measure¹ where savings can be standardized across projects, and expand this work to include commercial buildings.

While many UES-type efficiency measures still exist and continue to be an important resource for the region and RTF, savings for some of these types of measures has diminished, leading to an increase in focus on optimizing the energy performance of a particular building. Strategic Energy Management (SEM) is one such program that makes buildings more efficient through the use of better energy practices, policies, and processes. SEM can be implemented on its own or in combination with more traditional UES-type projects (i.e., capital projects) such as new and more efficient HVAC or lighting. When SEM and capital projects are combined, retrospective studies often estimate the contribution of each measure type to the overall observed energy savings.

To date the RTF has not developed a measure for SEM, as the primary resource at the RTF is the guidance document that provides “guidance specifically relevant to the evaluated program-level savings, costs, benefits and lifetime of measures implemented by industrial Strategic Energy Management (SEM) programs.”² This document defines SEM as

“a collection of organizational practices, policies, and processes that are intended to result in implementation of efficiency measures within a facility. Any type of measure may be implemented, depending on the program. Some programs target operations and maintenance (O&M) measures, while others pursue both capital and O&M measures. One common objective of SEM programs is to change the culture of participating facilities, so that the identification, implementation, and maintenance of energy efficiency measures becomes a routine part of on-going facility planning and operations.”³

The Northwest Power and Conservation Council, in its 2021 Power Plan, included a measure for “commercial energy management”⁴ as well as two SEM measures for the industrial sector.⁵ To

¹ The RTF considers several different types of energy efficiency measures, including Unit Energy Savings (UES) measures, which are often “widget”-type measures with relatively consistent energy savings; Standard Protocols, which are measures with more variable yet still standardizable energy savings mechanisms; and Custom Protocols, for measures where energy savings vary widely site-by-site and are difficult to estimate in a standardized manner. The RTF also produces other work products, such as program impact evaluation and guidance documents and white papers, to support the planning and evaluation of other energy efficiency measures.

² Regional Technical Forum, *Guidance on Evaluated Energy Savings for Industrial SEM*, July 2021, page 3.

³ Ibid.

⁴ Analysis workbook is titled “Com-EM-2021P_V4.xlsx” and available for download here: <https://nwcouncil.box.com/s/cpujndkidoy77qt7mxggitz4yebnf3m5>.

⁵ Analysis workbook is titled “Ind-SEM-2021P_V3.xlsx” and available for download here: <https://nwcouncil.box.com/s/ttru1xbmdsfhmfme4myzycz800ixsneq3>.

continue to support the RTF's work beyond the UES measure, the RTF is seeking a contractor to review the Council's work on SEM to determine the potential to update and enhance those measures and determine the applicability to both update the RTF's guidance document and develop a standardized SEM measure for the RTF.

To complete this objective, the RTF anticipates the following tasks for this project:

Task 1: Review the Council's 2021 Plan analyses for commercial and industrial SEM and determine the best available data to update and enhance these measures.

- Contractor should review the data sources used, methodology, and results (energy and demand savings, cost, lifetime) of the 2021 Plan commercial and industrial SEM analyses.
- Contractor should perform research identifying and reviewing more recent data and/or informational sources on commercial and industrial SEM energy and demand savings, hourly savings shapes, costs, and lifetimes than those used in the 2021 Plan. Example data sources include efficiency program evaluations, case studies, and Department of Energy (DOE) literature. Data and information sources specific to the Pacific Northwest are most desirable.
- Contractor should provide estimates of SEM energy and demand savings, costs, and lifetime using best available data. Contractor should also summarize specific practices (if possible) used in achieving efficiency savings. In cases where SEM practices are combined with capital projects and the data allow, contractor should provide separate estimates of SEM practice savings versus capital project savings. If contractor identifies other key drivers or correlates of SEM savings, such as type of SEM program, type of SEM practice, building type, system type, etc., contractor should estimate SEM savings, costs, and life for each, as available.

Deliverables: Provide a memo summarizing the key findings of the work and Microsoft Excel workbook(s) summarizing the data sources, specific SEM practices, energy and demand savings estimates, hourly savings shapes, costs, and lifetime estimates identified in the study.

Task 2: Leveraging best available data and insights from the Council's work, review and update the RTF's Industrial SEM Guidance Document and assess potential for expanding the document to include commercial.

- Contractor should review the document "Guidance on Evaluated Energy Savings for Industrial SEM"⁶ and work with RTF staff as necessary to understand the history and content of the document.
- Contractor should recommend and discuss with RTF staff proposed enhancements or improvements to the existing industrial SEM document, based on newer available data or evaluation practices, if available. In addition, Contractor should make recommendations on how the existing industrial-focused document may be expanded to include commercial sector SEM, and if agreed to by RTF staff, implement those recommended changes.
- Contractor will implement the proposed updates agreed upon by RTF staff and present the proposed updated version to the RTF for approval.

⁶ Guidance document available for download here:

<https://nwcouncil.app.box.com/file/828649422276?v=202107SEMGuidanceProp>.

Deliverables: An updated version of the RTF’s SEM evaluation guidance document, and a presentation to the RTF, summarizing any updates and enhancements made to the existing RTF SEM guidance document for approval.

Task 3: Determine the potential to develop a new UES or Standard Protocol RTF measure for commercial and/or industrial SEM or other energy management related programs in commercial or industrial buildings.

- Using the updated 2021 Plan Council SEM measures as a reference, Contractor should determine the potential to leverage the basis of these measures to develop a new RTF UES, Standard Protocol, or Custom measure for consideration by the RTF. Recommendation should document any key details needed for an RTF measure and any differences between the Council and proposed RTF measure.
- Contractor should also identify energy management similar to SEM in commercial and industrial buildings, including any relevant data, that should be considered by the Council or RTF for potential measures.
- Optional task: Contractor can propose scope, budget, and timeline for the development of any relevant RTF SEM measures.

Deliverable: A memo summarizing the key findings and recommendations of the potential to develop a commercial and/or industrial SEM or other energy management-related measure for the RTF.

III. Timeline and Budget Expectations

Proposers shall include the proposer’s estimated costs. Proposals should be based on time and materials, with a not-to-exceed limit, and include a detailed cost estimate.

The RTF would like to complete this work in the 2024 calendar year, targeting completion of Task 1 no later than the end of September 2024, with the remaining tasks’ completion being flexible and can be coordinated with the selected contractor.

IV. How to Submit a Proposal and Required Elements

Proposals shall be submitted to the RTF in electronic format by **May 10, 2024**.

Proposals shall be emailed to:
Northwest Power and Conservation Council
Laura Thomas
RTF Manager
rtfadmin@nwcouncil.org

Proposals shall include the following elements:

- Contact information and brief description of the firm submitting the proposal
- Description of the technical and management approach to complete the work and deliver the services
- Qualifications of all personnel who will be working on the project

- Budget proposal that includes the hours and rates of all personnel, with a not to exceed cost
- Reporting schedule and project timeline
- Web site addresses or listing of similar work that can be reviewed by the proposal evaluation team
- Any other material the proposer deems pertinent

Any questions regarding this RFP shall be directed to Laura Thomas. Please note that responses will be limited to correcting errors in the RFP or clarifying the RFP’s provisions. If questions received identify significant information that would assist proposers in submitting proposals, such information will be made available by reasonable means, such as posting on the RTF’s webpage, to all persons or entities who have received the RFP to ensure all proposers have access to the same information.

V. How the RTF Will Select a Final Proposal

An evaluation team will review the proposals. The team will be comprised of staff from the Council’s Resources Team and RTF’s contract analyst team. Proposals will be evaluated based on the proposed approach to and the qualifications for the services sought in Section II above. The evaluation committee will also consider the proposer’s cost of service.

VI. Right to Reject and Proposal Costs

The RTF reserves the right to reject any and all proposals and may cancel, modify, or revise this RFP at any time. The RTF shall not be obligated to procure any services resulting from this RFP. Neither the Council nor the RTF is liable to any proposer for any loss or expense caused by or resulting from a delay, suspension, or cancellation of the RFP, award, or rejection of any proposal. Proposer shall bear all costs incurred in developing and submitting its proposal.

VII. Project Schedule

Proposals Due:	Friday, May 10, 2024
Selection of Winning Proposal(s):	Week of May 20, 2024
Project Start Date:	Week of May 27, 2024 (or as agreed to)

VIII. Equal Opportunity

The Council and the RTF promote equal opportunity for all individuals without regard to race, color, national origin, religion, sex, gender, gender identity (including gender expression), sexual orientation, marital status, age, disability, genetic information, military or veteran status, or any other protected status in accordance with applicable federal, state, and local laws.

IX. Diversity, Equity, and Inclusion

Responders are encouraged to review the Council’s [inclusion statement](#). The Council is interested in learning from and encourages, in all opportunities, the participation of those who are also taking steps to ensure diversity, equity, and inclusion in their work. To this end, please consider

providing a response to the following questions. Providing a response is voluntary. Responses will not be considered in proposal evaluation and selection.

- Please indicate if you are a small, minority, woman, or veteran-owned business.
- Please outline any efforts taken at your organization to promote diversity, equity and inclusion in your organization's practices or policies, including, for example, staffing and contracting

X. Disclosure Notice

The Council does its work in public as required by the Northwest Power Act. The Council, although not a federal agency, complies with the Freedom of Information Act. The Council's policy is available for review on our [website](#).