



# Request for Proposal

## Energy Efficiency Programs Process and Impact Evaluation

Issued: 2/20/2019

Questions Due: 3/8/2019

Responses Due: 4/19/2019

RFP Coordinator: Rob Ward

**\*This RFP process will be conducted via Idaho Power's on-line bidding tool, Power Advocate. For an invitation and instruction on how to access Power Advocate, please email the RFP Coordinator, Rob Ward, at [RWard@idahopower.com](mailto:RWard@idahopower.com). Include your name, company name, phone number and email address in your email.**

**Idaho Power Company**  
**P.O. Box 70**  
**Boise, ID 83707**

# Table of Contents

<b>INTRODUCTION</b>	<b>1</b>
Purpose .....	1
Company Background.....	1
Project Background/Current State.....	1
Scope of Work/Specifications and Requirements.....	3
<b>Key Objectives</b>	3
<b>Key Tasks</b>	3
<b>GENERAL INFORMATION FOR RESPONDENTS</b>	<b>6</b>
Key Events and Dates.....	6
RFP Schedule	6
Project Schedule	6
Questions	6
Proposals	7
Contact Information.....	7
RFP Coordinator	7
Content of Proposals .....	7
Failure to Comply.....	8
Contractual Status of Proposals.....	8
In Whole or In Part.....	8
Revisions to the RFP.....	8
Cost to Propose .....	8
Respondent to Conform with Law.....	9
Business Conduct Policy .....	9
Proprietary Information—Confidentiality.....	9
Accountability .....	9
Small Business and Small Disadvantaged Business Program .....	9
Physical and Electronic Protection.....	10
<b>RFP EVALUATION PROCESS</b>	<b>10</b>
RFP Evaluation Team.....	10
RFP Evaluation Criteria.....	10
Form of Contract.....	11
Entire RFP .....	11
Attachments.....	11



# INTRODUCTION

## Purpose

Idaho Power Company (“IPC”) is currently seeking proposals in response to this Request for Proposal (“RFP”) to provide impact and process evaluations for the Energy House Calls and Residential New Construction Pilot programs and an impact evaluation for the New Construction and Retrofits portion of the Commercial and Industrial program. Impact evaluations would provide analysis for the 2018 program year. Process evaluations would analyze current program processes. Contractors are encouraged to provide a proposal for all or part of the scope of services requested in this Request for Proposal.

## Company Background

IDACORP, Inc. is a holding company formed in 1998. Comprised of regulated and non-regulated businesses, its origins lie with Idaho Power, a regulated electric utility that began operations in 1916.

Today, IPC is the largest regulated electric utility in the state of Idaho and IDACORP’s chief subsidiary. IPC serves over 500,000 residential, business, agricultural, and industrial customers. The company’s service area covers approximately 24,000 square-miles, including portions of eastern Oregon. Learn more about Idaho Power at [www.idahopower.com](http://www.idahopower.com).

## Project Background/Current State

### Energy House Calls program (Impact and Process evaluation)

Initiated in 2002, the Energy House Calls program gives homeowners of electrically heated manufactured homes an opportunity to reduce electricity use by improving the home’s efficiency. Specifically, this program provides free duct-sealing and additional efficiency measures to Idaho Power customers living in Idaho or Oregon who use an electric furnace or heat pump. Participation is limited to one service call per residence for the lifetime of the program.

Services and products offered through the Energy House Calls program include duct testing and sealing according to Performance Tested Comfort System (PTCS) standards set and maintained by the Bonneville Power Association; installing up to eight LED lightbulbs; testing the temperature set on the water heater; installing water heater pipe covers when applicable; installing up to two low-flow showerheads, one bathroom faucet aerator, and one kitchen faucet aerator; and leaving two replacement furnace filters with installation instructions and energy efficiency educational materials appropriate for manufactured-home occupants.

Idaho Power provides contractor contact information on its website and marketing materials. The customer schedules an appointment directly with one of the certified contractors in their region. The contractor verifies the customer’s initial eligibility by testing the home to determine if it qualifies for duct-sealing. Additionally, contractors have been instructed to install LED lightbulbs only in high-use areas of the home, to replace only incandescent lightbulbs, and to install bathroom aerators and showerheads only if the upgrade can be performed without damage to a customer’s existing fixtures.

The actual energy savings and benefits realized by each customer depend on the measures installed and the repairs and/or adjustments made. Although participation in the program is free, a typical cost for a similar service call would be \$400 to \$600, depending on the complexity of the repair and the specific measures installed.

In 2018, 280 homes received products and/or services through this program, resulting in 374,484 kWh savings.

### **Residential New Construction Pilot Program (Impact and Process evaluation)**

Initiated by Idaho Power in 2003 in coordination with NEEA, the ENERGY STAR® Northwest Homes Program's objective is to increase the efficiency of the residential-building envelope and air-delivery system above current building codes and building practices in Idaho and Oregon. Idaho Power offers a \$1,000 incentive to builders for each new home that uses electric heat pump technology, is at least 15 percent more energy efficient than standard construction, and meets EPA's ENERGY STAR Version 3 certification requirements.

Upon completion of the construction, a Residential Energy Services Network (RESNET)-certified rater will enter home data into the regional AXIS database. This database, which is maintained by NEEA, allows NEEA and Idaho Power to track and review project information to determine if program requirements are met. The rater will also generate a Northwest Compliance Report (in accordance with REM/Rate™ modeling guidelines) that further verifies the home meets the equivalent of ENERGY STAR Version 3 requirements.

In 2017, the company began making changes to the program, which was renamed the Residential New Construction Pilot Program.

In 2018, there were 307 participants (homes) resulting in 777.369 kWh savings.

### **Commercial and Industrial Energy Efficiency Program – New Construction option (Impact evaluation)**

The New Construction option enables customers in Idaho Power's Idaho and Oregon service areas to apply energy-efficient design features and technologies in new construction, expansion, or major remodeling projects. New construction and major renovation project design and construction life is much longer than small retrofits and often encompasses multiple calendar years. Originated in 2004, the program currently offers a menu of measures and incentives for efficient lighting, cooling, building shell, controls, appliances, and refrigeration options. These measures may otherwise be lost opportunities for savings on customers' projects.

Twenty-four prescriptive measures are offered: interior lighting, exterior lighting, daylight photo controls, occupancy sensors, high-efficiency exit signs, efficient A/C and heat pump units, efficient variable refrigerant flow units, efficient chillers, air-side economizers, direct evaporative coolers, evaporative pre-coolers on air-cooled condensers, reflective roof treatment, energy-management control systems, guest room energy-management systems, HVAC variable-speed drives, kitchen hood variable-speed drives, onion/potato shed ventilation variable-speed drives, efficient laundry machines, ENERGY STAR® under-counter dishwashers, ENERGY STAR commercial dishwashers, refrigeration head-pressure controls, refrigeration floating-suction controls, efficient condensers, and smart power strips.

In 2018, there were 104 projects resulting in 13,378,315 kWh savings.

### **Commercial and Industrial Energy Efficiency Program – Retrofits option (Impact evaluation)**

The Retrofits option is Idaho Power's prescriptive measure option for existing facilities. This part of the program encourages customers in Idaho and Oregon to implement energy efficiency upgrades by offering incentives on a defined list of measures. Eligible measures cover a variety of energy-saving opportunities in lighting, HVAC, building shell, variable-frequency drives, food-service equipment, and other commercial measures. Customers can also apply for non-standard lighting incentives. A complete list of the measures offered through the Retrofits option can be found at [www.idahopower.com/ways-to-save/energy-efficiency-program-reports/](http://www.idahopower.com/ways-to-save/energy-efficiency-program-reports/).

In 2018, there were 1358 projects resulting in 34,910,707 kWh savings.

### Scope of Work/Specifications and Requirements

#### **Key Objectives**

The key objectives of the impact evaluation include:

- Determine and verify the energy (kWh, kW) impacts attributable to the 2018 program. Ex-ante savings estimates are determined using various sources including the Regional Technical Forum deemed savings, program technical reference manuals, lighting calculator, and internal/external engineering estimates.
- Provide credible and reliable program energy and non-electric impact estimates and ex-post realization rates attributed to each program for the 2018 program year.
- Report findings, observations, and provide recommendations that enhance the effectiveness of future ex-ante savings analysis and the accurate and transparent reporting of program savings.

The key objectives of the process evaluation include:

- Evaluate program design including program mission, logic, and use of industry best practices.
- Evaluate program implementation including quality control, operational practice, and outreach.
- Evaluate program administration including program oversight, staffing, management, training, documentation and reporting.
- Report findings and observations and recommendations to enhance program effectiveness.

#### **Key Tasks**

It is anticipated that at a minimum, the selected contractor will be required to undertake the following tasks. Proposals should address these tasks in detail:

##### **Task 1: Statement of Work Meeting**

Contractor will meet with Idaho Power staff within two weeks on contract signing and present proposed evaluation methodologies, data collection plan, analysis, report preparation and delivery, and any other activities contractor and IPC feel pertinent to the evaluation. A final Statement of

Work will be developed based on outcomes from this meeting. This Statement of Work will become part of the contract and will become the basis for this evaluation.

**Task 2: Work Plan**

The contractor will develop a detailed work plan based on the Statement of Work. The work plan will include evaluation goals, a schedule of tasks and delivery dates, evaluation goals, evaluation methodologies, and a sampling plan. This plan must be approved in writing by IPC prior to contractor beginning further evaluation.

**Task 3: Site Visits and Participant Interviews**

Where appropriate, the contractor will verify installation of energy efficiency measures and associated energy impacts including kW and kWh by conducting site visits to program participant locations. Contractor should recommend and propose the appropriate number of site visits based on their experience and expertise with similar evaluations.

It is necessary that the contractor coordinate efforts with Idaho Power staff regarding customer contact and conduct research in such a manner as to minimize the time impact on IPC's customers participating in this evaluation. Contractor will provide own safety equipment including hard hat, safety glasses and vest, and closed toed footwear. Information provided by program participants will be considered confidential in terms of attribution and shall not be shared with any other party.

**Task 4: Impact Analysis**

The contractor will analyze the data collected from previous tasks to develop estimates of energy impacts at the program and measure levels. Contractor will provide these estimates by comparing deemed values or algorithms to the source, data collected from site visits, desk reviews, customer interviews, and "best practice" engineering methods. Contractor will provide an estimation of program realization rates to assist in determining ex-ante gross energy savings.

**Task 5: Process Analysis**

The contractor will evaluate program design including program mission, logic, and use of industry best practices. Contractor will evaluate program implementation including quality control, operational practice, and outreach. Contractor will evaluate program administration including program oversight, staffing, management, training, documentation and reporting.

**Task 6: Reporting**

The contractor will be required to provide to the IPC Energy Efficiency Evaluator bi-weekly status reports detailing progress toward completion and any obstacles encountered. These status reports will be due by the 1st and 15th of each month and will include an updated schedule of future activities.

The contractor will provide a draft final report to the IPC Energy Efficiency Evaluator upon completion of all tasks. This draft report will be reviewed by IPC and comments will be provided to

contractor for clarification as necessary. Finally, the contractor will provide to the Energy Efficiency Evaluator, an unalterable version of the report. Graphs and/or tables are recommended for information not easily conveyed in narrative form. The draft and final report is required to contain, at a minimum, sections containing; an executive summary, evaluation methodologies, and findings and conclusions.

## GENERAL INFORMATION FOR RESPONDENTS

### Key Events and Dates

IPC at its sole discretion, reserves the right to alter the dates listed below and/or add to or remove scheduled activities.

### RFP Schedule

<u>Event</u>	<u>Estimated Completion Date</u>
RFP Issued	2/20/2019
Last Day for Respondents to Submit Questions	3/8/2019
RFP Proposals Due	4/19/2019
Review and Evaluation of Proposals completed	5/3/2019
RFP Award	5/10/2019

### Project Schedule

<u>Event</u>	<u>Completion Date</u>
Project kick-off conference call	5/17/2019
Scope of Work developed	5/31/2019
Final reports due	11/8/2019

### Questions

Respondents should carefully review this RFP for questions, clarifications, defects and questionable or objectionable material. Comments and questions concerning clarifications, defects and questionable or objectionable material **must be submitted through the Power Advocate tool to the RFP Coordinator and must be submitted on or before the date and time specified on the RFP Schedule.** No questions will be accepted after this date.

All questions and their applicable responses will be provided to every Respondent via Power Advocate.

Protests based on any omission or error, or on the content of this solicitation, will be disallowed if they have not been brought to the attention of the RFP Coordinator in the timeframe outlined in this document.

## Proposals

All proposals **must be received through Power Advocate on or before the date and time specified on the RFP Schedule.**

**All copies of the proposal and accompanying documentation become the property of IPC and will not be returned.**

## Contact Information

### RFP Coordinator

Throughout the duration of the information gathering and proposal process, all questions, submission of references, responses and other communications concerning this RFP are to be directed through Power Advocate to the RFP Coordinator. Respondent agrees that, during the RFP process and prior to the response deadline, Respondent shall not discuss this procurement with any IPC employee other than the designated RFP Coordinator as identified below. Failure to comply with these requirements may result in Respondent disqualification and elimination from the RFP process.

Name: Rob Ward

1221 W. Idaho Street  
Boise, Idaho 83702

## Content of Proposals

Respondents submitting a proposal shall use the following outline and criteria:

- 1) **Cover Letter** (2 pages maximum).
- 2) **Introduction** – Provide general introduction and information about your company (3 pages maximum).
- 3) **Project Team** – Provide information describing how your project team is organized along with a description of the key personnel and how they will contribute to the project or work. Identify any subcontractor(s) that may be part of the team and the type of work that will be performed by the subcontractor(s). In addition, specify if any of the subcontractor(s) are certified Women-Owned Businesses and/or Minority-Owned Businesses (5 pages maximum – Full resumes may be provided in the Supplemental Information section and will not count against the 5 pages).
- 4) **Client References** – Provide at least three references from clients for which Respondent's company has performed similar work described in this RFP in the past five years (2 pages maximum).
- 5) **Project Qualifications** – Provide a description of why your firm is qualified to perform this work including relevant projects completed in the last 5 years (5 pages maximum).

- 6) **Project Approach** – Describe how you would perform the work required for this project, your approach for completing the work (5 pages maximum).
- 7) **Fees, Costs, and Schedule** – The work must be completed prior to 10/26/2018. Provide a logic driven CPM project schedule, including a schedule of tasks, and a price for each task proposed in the project schedule. In addition, please provide all fees and cost data. This data should itemize all costs, including taxes, indirect costs, and markup.
- 8) **Supplemental Information** – Include any additional information including resumes, client reference information, and any other material that demonstrates your company’s qualifications for successfully completing this project. (There is no maximum number of pages. However, the additional information provided should be concise and relevant to this project). General information provided by Respondent that is not specifically requested in this RFP should be attached separately and clearly labeled “Supporting Material.”

## Failure to Comply

Respondent is specifically notified that failure to comply with any part of the RFP may result in disqualification of the proposal, at IPC’s sole discretion.

## Contractual Status of Proposals

This RFP has been prepared solely to solicit proposals, and is not a contract offer. This RFP is not binding on IPC. The only document that will be binding on IPC is a contract duly executed by IPC and the successful Respondent (if any) after the completion of the selection process and the award and negotiation of a contract. IPC reserves the right to reject any and all proposals submitted by Respondents. The issuance of this RFP does not obligate IPC to purchase any product or services offered by Respondent or any other entity, or requested herein. Furthermore, IPC may choose, at its sole discretion, to abandon the RFP process in its entirety. Respondents agree that they submit offers without recourse against IPC, IDACORP Inc., any of IDACORP Inc.’s affiliates, or any of their respective employees, agents, officers, or directors for failure to accept an offer for any reason.

## In Whole or In Part

IPC reserves the right to accept the proposal in whole or in part, and to award to more than one Respondent. Furthermore, Respondent understands that any "award" by IPC does not obligate IPC in any way. IPC will not be obligated to any party unless and until IPC executes a definitive agreement between the parties.

## Revisions to the RFP

The requirements specified in this RFP reflect those presently known. IPC reserves the right to vary, in detail, the requirements and/or to issue addenda to the RFP. IPC also reserves the right to cancel or to reissue the RFP in whole or in part, prior to the execution of a contract, if any. In the event it becomes necessary to revise any part of the RFP, addenda will be provided to Respondents included in the current and applicable stage of the RFP.

## Cost to Propose

Respondent will absorb all costs incurred in responding to this RFP, including without limitation, costs related to the preparation and presentation of its response. All materials submitted by the Respondent

immediately become the property of IPC. Any exception will require written agreement by both parties prior to the time of submission.

## Respondent to Conform with Law

Respondent shall conform in all material respects to all applicable laws, ordinances, rules, and regulations and nothing in this RFP shall be construed to require IPC or Respondent to act in a manner contrary to law.

## Business Conduct Policy

In responding to this RFP, Respondent shall adhere to best business and ethical practices.

Respondent shall adhere to IPC's *Supplier Code of Conduct*, available at [www.idahopower.com](http://www.idahopower.com).

## Proprietary Information—Confidentiality

Respondent acknowledges and agrees that all information obtained or produced in relation to this RFP is the sole property of IPC and shall not be released or disclosed to any person or entity for any purpose nor used for any purpose other than providing a proposal to IPC, without the express written consent of IPC. **Respondent agrees not to make any public comments or disclosures, including statements made for advertising purposes, regarding the RFP to the media or any other party without the prior written consent of IPC.** In the event Respondent receives any inquiries regarding the RFP from the media or any other Party, said inquiries shall be forwarded to IPC.

Respondent shall specifically designate and clearly label as "CONFIDENTIAL" any and all material(s) or portions thereof that they deem to contain proprietary information.

## Accountability

Respondent whose proposal may be selected in response to this RFP acknowledges that it assumes full legal responsibility for the accuracy, validity, and legality of the work provided in conformance with this RFP. Respondent agrees to maintain sufficient resources to perform its obligations.

## Small Business and Small Disadvantaged Business Program

IPC is committed to the implementation of a Small and Disadvantaged Business Program. It is the intent of IPC that small business concerns and small businesses owned and controlled by socially and economically disadvantaged individuals have the opportunity to participate in the performance of contracts awarded by IPC. Consequently, we request that you indicate your eligibility as a small business based upon the regulations in Title 13, Code of Federal Regulations, Part 121. (If in doubt, consult the Small Business Administration Office in your area).

Eligibility as a small disadvantaged business is first based on eligibility as a small business, as noted above. Second, the business must be majority owned (51 percent or more) and controlled/managed by socially and economically disadvantaged person(s). The Small Business Administration designated the following groups as "presumed socially disadvantaged": Black Americans, Hispanic Americans, Native Americans, and Asian-Pacific Americans. Other individuals may be found socially disadvantaged and eligible for the program on a case-by-case basis. If you have any questions, please see 13 CFR 124.1-124.1016 or contact your local Small Business Administration office.

## Physical and Electronic Protection

IPC is required by federal law and regulations to protect access to its critical assets, both physical and electronic. Certain portions of IPC's premises may have restricted access and may require prior authorization or an IPC designated escort to all access by IPC contractors.

In the event IPC moves forward with Respondent, IPC will require Respondent to comply with federal, state, or local laws or regulations, and any applicable IPC policies, standards, and procedures related to physical security of IPC's premises prior to performing any work for IPC. These include, but are not limited to, any policies, standards and procedures requiring drug screening, background checks, and social security verifications. Should Respondent require access to IPC's network, or unescorted access to IPC's or its customer's premises as part of the work under a definitive contract, Respondent will not be able to perform any work for IPC until this criteria has been satisfied. Respondent will also be required to sign and comply with all IPC forms related to the same.

## RFP EVALUATION PROCESS

### RFP Evaluation Team

An IPC evaluation team will determine the proposal that best meets the requirements of this RFP and provides the best overall value for IPC. Proposals will be evaluated in accordance with the requirements set forth in this RFP, any addenda that are issued, and any other factor IPC deems appropriate. Based upon RFP response evaluation and scoring, references, and any subsequent activities identified during the evaluation process (clarifications, etc. that may be required), IPC may identify the top candidate(s) for further clarifications and/or a Respondent presentation.

Those Respondents whose proposals have not been selected will be notified via an email or a written letter at the number and address provided in their proposal.

### RFP Evaluation Criteria

At a minimum, proposals will be evaluated based on the response to this RFP, which may include, but not be limited to the following criteria:

- Ability to meet requirements
- Financial stability of company
- Total Cost
- Minimal exceptions to Attachment A
- Reputation for thoroughness, credibility, and client responsiveness as demonstrated through references
- Any other factors deemed appropriate by IPC

## Form of Contract

IPC directs Respondent to Attachment A, Professional Services Agreement (PSA). In the event IPC decides to move forward with Respondent, Respondent will be required to enter into a legally binding contract substantially similar to Attachment A. As part of this RFP, Respondents must indicate acceptance of IPC's Attachment A in its response to this RFP. Alternatively, if the Respondent is unwilling to agree to a proposed clause or term, Respondent must provide redlines of the PSA identifying any proposed changes requested by Respondent. **Respondent's proposal will be deemed non-responsive if Respondent fails to either acknowledge acceptance of the PSA "as is" or to provide redlines to that document. Please be advised that Respondent's proposal will be judged, in part, on Respondent's willingness to comply with the original terms of the PSA. The PSA provided by Respondent in its response should be Respondent's best and final offer as to the legal terms and conditions Respondent is willing to accept.**

If IPC is unable to reach agreement on all contract terms and conditions with the designated Respondent, IPC at its sole discretion reserves the right to extend or terminate negotiations and begin negotiations with another Respondent.

## Entire RFP

This RFP and all Attachments or Exhibits attached hereto and incorporated herein by this reference represent the final expression of this RFP. Only information supplied by IPC in writing through the parties listed herein or by this reference made in the submittal of this RFP shall be used as the basis for the preparation of Respondent's proposals.

## Attachments

Attachment A: Professional Services Agreement

Attachment B: Respondent questionnaire