



December 9, 2022

Subject: Puget Sound Energy
Customer Energy Management
2024-25 Energy Efficiency Services Energy Efficiency Programs Request for Information

Dear Potential Bidder:

Puget Sound Energy, Inc. (PSE) is soliciting written responses for **new and innovative demand side energy management products, programs and support services** for the 2024 through 2025 program period. This Request for Information (RFI) is sponsored by the Customer Energy Management (CEM) group at PSE.

You may provide an RFI response for more than one topic. Each written response should be separately submitted with all response components clearly labeled with your company name and the product program or support services being proposed.

Electronic responses must be received by no later than 5:00 PM Pacific Time, **January 23, 2023** to CEMRFP@pse.com

All communication regarding this RFI should be directed to CEMRFP@pse.com.

Sincerely,

A handwritten signature in black ink that reads 'JoEllen V. Fajardo'.

JoEllen V. Fajardo
Senior Market Analyst
Customer Energy Management - Puget Sound Energy

Table of Contents

- I. REQUEST FOR INFORMATION 3**
 - A. Key Considerations for Respondents..... 3
 - B. PSE’s Critical Requirements, Anticipated Focus Areas and Priority Considerations..... 4
 - C. Solicitation Timeline..... 7
 - D. About Puget Sound Energy 7
 - E. About Customer Energy Management (CEM) – Sponsor..... 8
- II. RESPONSE INSTRUCTIONS..... 9**
 - A. Format..... 9
 - B. Questions 9
 - C. Submitting Responses..... 9
 - D. Response Template 9

I. REQUEST FOR INFORMATION

Puget Sound Energy's (PSE) Customer Energy Management (CEM) group is requesting information from interested parties experienced in **demand side energy management products, programs and support services**. The purpose of this Request for Information (RFI) is to solicit information on new and innovative energy efficiency products and services that could be incorporated into energy management programs for PSE customers in the 2024-2025 biennium. This RFI is issued solely for planning purposes, to assess interest in and potential for services to inform future Requests for Proposals (RFP).

*Please note: this RFI should not be considered a solicitation for quotation or a request for proposal, and PSE will not be obligated to issue any solicitations now or in the future or to consider any unsolicited responses. Further, PSE maintains no obligation to reimburse respondent for any costs incurred in association with this RFI.

A. Key Considerations for Respondents

- a. Products, programs or services must result in either: (i) direct and measurable gas and/or electric energy savings, or (ii) new and measurable improvement to PSE's current delivery or communication of products and services to customers through existing¹ programs.
- b. Prospective Respondents are not required to respond to this RFI in order to participate in any future Request for Proposal (RFP) process. PSE, in its sole judgement, will determine with whom to engage in further discussion and/or request a proposal through a standard Request for Proposal RFP process.
- c. Any products shared through this RFI should be available for implementation starting January 1, 2024 and ending December 31, 2025.
- d. PSE is under no obligation to select any provided response or move forward with any proposed program.
- e. Confidentiality, Ownership and Use of Information - your response to this RFI will become the property of PSE upon its receipt, and PSE may share this information as part of its internal evaluation system, including with regulatory stakeholders. Information will not be shared with other vendors. It is recommended that you do not include any information in your response that your company claims to be proprietary or confidential without the prior written agreement of PSE. Information submitted through this RFI could be used to assist PSE in preparing a request for proposal (RFP) and to identify candidates for participation.
- f. PSE values diversity, equity, and inclusion in all areas of business and service, including procurement and program implementation. Black, indigenous, people of color (BIPOC), immigrant, refugee, women, LGBTQ+ and veteran-led businesses and/or vendors that maintain strong relationships with the diverse communities of PSE's service area are encouraged to respond.

¹For the purposes of this RFI, existing programs are defined as those currently in operation for the 2022-2023 biennium.

Electric **program details***: <https://www.pse.com/pages/rates/electric-tariffs-and-rules>

Gas **program details***: <https://www.pse.com/pages/rates/gas-tariffs-and-rules>

*View the Conservation Schedules by selecting **Conservation** from the *Schedule Type* filter.

B. PSE's Critical Requirements, Anticipated Focus Areas and Priority Considerations

All responses must meet PSE's Critical Requirements and should be aligned with PSE's anticipated 2024-25 Focus Areas and Priority Considerations in order to be considered for a future program concept.

a. Critical Requirements

All proposed concepts must:

- Comply with Conservation Tariffs: Electric 83² and Natural Gas 183³
- Result in direct or indirect energy efficiency savings,
- Meet PSE program cost-effectiveness standards,
- Provide evaluable, measurable and verifiable outcomes, and
- Maintain a reasonable Direct Benefit to Customer⁴/Program Administrative Cost Ratio.

b. Priority Considerations

Proposed concepts will be given priority consideration for one or more of the following:

- Improve customer experience and satisfaction,
- Integrate with other PSE programs particularly via co-deployment, and/or
- Directly benefit all customers who face higher burdens to participate in programs (with special emphasis on Named Communities as described in the [Clean Energy Implementation Plan](#)).

c. Anticipated Focus Areas for 2024-2025

Proposed concepts should highlight how the bidder's product or idea would meet one or more of the following areas of focus: innovations in program delivery, streamlined delivery of existing programs, and/or **enhancements to existing portfolio savings with a new product, service or approach.**

Other specific areas of interest include, but are not limited to:

- **Software**
 - Virtual Verification/Audit Software
 - Software to streamline workflows and transfer of verification documentation
 - Energy efficiency measure/Source of Saving creation, approval, maintenance system
 - Resource for customers to identify EE opportunities such as cost/payoff aids

² **Electric program details:** (Including Electric Schedule 83*) <https://www.pse.com/pages/rates/electric-tariffs-and-rules>

³ **Gas program details:** (Including Natural Gas Schedule 183*) <https://www.pse.com/pages/rates/gas-tariffs-and-rules>

* To view all Conservation Schedules, select **Conservation** from the *Schedule Type* filter.

⁴ Costs related to customer service and engagement activities (versus program implementation administrative costs)

- **Program Implementation**

- Programs that address - or compensate for - workforce and supply chain disruptions
- Fixed cost installation HPWH pilot in addition to retail and midstream.
- Programs designed to address the split-incentive between landlords and tenants in order to spur higher efficiency for renters.
- Behavioral programs for residential and non-residential beyond home energy reports.
- Program model suggestions to identifying and provide in-home service for customers that can most benefit from in person home energy assessments.
- New Construction innovations
 - Energy Use Intensity (EUI) based approaches (or other whole building approaches)
 - Performance based approaches
 - Prescriptive offerings for single-family new construction. Particular interest in advanced envelope offerings. The offerings would need to be incremental to code so not something that the builder selects from the menu of R406 'Additional Energy Efficiency Requirements' of Washington State Energy Code
 - New and creative ways to provide non-cash or cash-equivalent incentives for participating customers
- Weatherization Assistance innovations
 - Program Designs that increase bandwidth of current income eligible programs and address service gaps
 - Program Designs that increase service to Multifamily properties
- Program focused on targeting the industrial sector
 - Process Load Pumping
 - Refrigeration EC motors
- New programs focused on natural gas savings
 - Ozone laundry
 - Pools and natatoriums
- ASHRAE Level 2 Audits - Support for select customers to meet WA State Clean Buildings Law requirements
 - May include program design, customer qualification, payment structure and post audit PM support
- Commercial Building Envelope Improvements
 - Traditional and new envelope improvement technologies
 - May include program design, delivery method, outreach and customer awareness, bundling with non-envelope measures
- Commercial Whole Building Performance Based Program
 - Baseline and savings verification from building meter data

- Small to Medium Commercial Building Strategic Energy Management
 - Monitor and evaluate building performance
 - Directly or indirectly implement operational and maintenance measures
 - Utilizes existing and supplemental controls and sensors
- **Outreach**
 - Trade Ally outreach, Support, & Account Management by sector and technology
 - Equipment manufacturer and seller outreach, support, & account management
- **Non-Traditional or Non-Conservation Programs and Support Services**
 - Programs and support services that leverage Inflation Reduction Act (IRA) tax credits and incentives including:
 - Home Efficiency Tax Credits
 - Whole House Rebates (HOMES)
 - Efficient Commercial Buildings Deduction
 - Rural Energy for America Program (REAP)
 - Programs and support services that leverage Washington State Climate Commitment Act (CCA) requirements and funds from the sale of carbon allowances including:
 - Weatherization, decarbonization, conservation, and efficiency services
 - Programs and support services that enhance offerings and investments made through the Infrastructure Investment and Jobs Act (IIJA) including:
 - Energy Efficiency and Conservation Block Grant Program
 - Building Codes Implementation for Efficiency and Resilience

C. Solicitation Timeline

This timeline is provided for planning purposes only and may be modified by PSE as required. PSE may choose to develop and release a 2023 RFI incorporating partial or full concepts received through this solicitation. A timeline for this RFI solicitation would be communicated to all respondents and eligible vendors prior to the release.

Activity	Target Completion Dates
Release of RFI	December 9, 2022
Written Response Submission	January 23, 2023

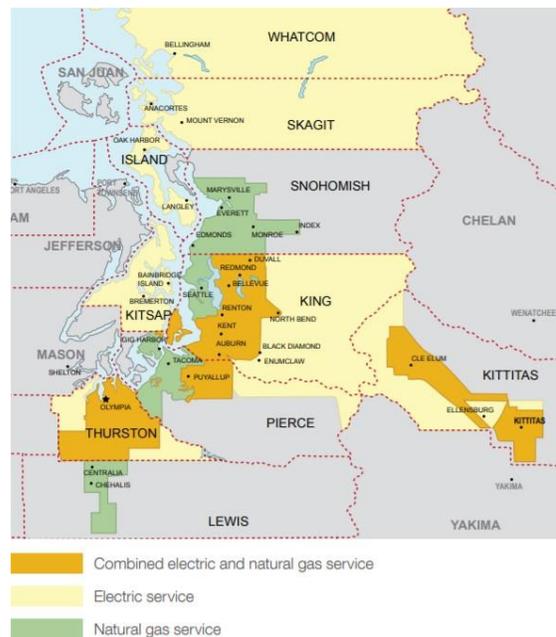
D. About Puget Sound Energy

Headquartered in Bellevue, Puget Sound Energy is proud to serve our neighbors and communities in 10 Washington counties. We're the state's largest utility, supporting 1.1 million electric customers and nearly 900,000 natural gas customers. With one of the nation's largest and oldest energy efficiency programs, we're dedicated to finding innovative solutions and building partnerships throughout the greater Puget Sound region.

PSE's strives to deliver a great customer experience and looks to our contractors to enhance that experience.

a. Service Area

- 6,000+ square miles, primarily in Puget Sound region of Western Washington
- Population of approx. 4 million within [service area](#)
- Counties within service area:
 - Island (electric)
 - King (combined)
 - Kitsap (electric)
 - Kittitas (combined)
 - Lewis (natural gas)
 - Pierce (combined)
 - Skagit (electric)
 - Snohomish (natural gas)
 - Thurston (combined)
 - Whatcom (electric)
 - Whidbey Island (electric)



b. PSE Customer Experience Intent Statement

PSE places high value on our interface with and commitment to our customers. The following statement reflects the experience we want to provide to our customers. PSE expects vendors to embody this statement.

In every interaction with PSE, I know I am dealing with honest and caring people who understand me, anticipate my needs and make doing business easy. I can trust they will be fair and do the right thing.

If there's a problem, they respond quickly and work until it is resolved to my satisfaction. Their information, products and services provide value and benefit, are reliable and keep me safe.

They are committed to help me control my energy cost and to be a responsible steward of the energy I consume.

E. About Customer Energy Management (CEM) – Sponsor

PSE is committed to helping our customers reduce energy costs in this challenging economy and helping to combat climate change.

Our success to date can be attributed to our customers, employees and partnerships with program service providers and trade allies. Together, we achieve a remarkable level of energy savings.⁵

Customer Energy Management provides energy efficient products and services to our commercial and residential customers.

⁵ Historical Plans and Reports: <https://www.pse.com/pages/rates/electric-tariffs-and-rules>

* Select **Historical Plans and Reports** from the *Document Type* filter

II. RESPONSE INSTRUCTIONS

A. Format

Responses are required to adhere to the specific format set forth in the table below. Responses that do not follow the requested format will increase the time required to review, and may be discarded.

B. Questions

A formal question and answer period will not be offered as part of the RFI development and review process. PSE may ask Respondents follow-up questions upon receipt of any written responses for clarity regarding the products, programs or services offered. These questions and answers will not be made public to all Respondents.

If a 2023 Request for Proposal is issued, PSE will accept questions during that process.

C. Submitting Responses

Responses should be submitted by email to CEMRFP@pse.com no later than 5 p.m. PST on January 23, 2023.

- Information should be presented as two attachments in Word, PDF or Excel formats. Files over 10MB or in .zip format will not be accepted due to server restrictions.
 - **Attachment 1:** RFI Response (required)
 - **Attachment 2:** Additional Information (optional)
- The response email must use the following subject line naming convention:
 - PSE New Programs RFI –[Customer Sector (*Residential or Commercial*)] / [Company Name]
 - Example: PSE New Program RFI - Residential / MzT Energy Reducers
- PSE will confirm receipt of responses via an autoreply. If an Autoreply is not received, please email joellen.vasquezfajardo@pse.com to confirm receipt.

D. Response Template

In order to facilitate Puget Sound Energy's review of the submitted concepts, Suppliers are required to provide responses in the following format:

- **Attachment 1:** RFI Response
 - Section 1: Cover Letter
 - Section 2: Product Summary
 - Section 3: Product References
- **Attachment 2:** Additional Information (optional)

a. EMAIL ATTACHMENT 1: RFI Response

Section 1 - Cover Letter

Please copy and paste the following template inserting the requested information. Limit 1 page.

- 1. Company Name
- 2. For any future contacts related to this RFI or potential RFPs resulting from this RFI please provide the following information:
 - Primary Contact
 - Title
 - Email
 - Phone
 - City/State

- 3. Response relates to the following PSE customer sector(s):
 Residential Multi-family Commercial Industrial

You may provide an RFI response for more than one topic. Each written response should be separately submitted with all bid components clearly labeled with your company name and the product program or support services being proposed. Please complete a separate response using this template for each sector.

- 4. Company specialties. Select all that apply:

- | | |
|---|--|
| <input type="checkbox"/> Behavioral Energy Efficiency | <input type="checkbox"/> Marketing |
| <input type="checkbox"/> Communications/Engagement | <input type="checkbox"/> Metering |
| <input type="checkbox"/> Community/Government Agency | <input type="checkbox"/> New Construction |
| <input type="checkbox"/> Controls | <input type="checkbox"/> Recycling |
| <input type="checkbox"/> Demand Response/Management | <input type="checkbox"/> Research |
| <input type="checkbox"/> E-Commerce/Sales | <input type="checkbox"/> Software |
| <input type="checkbox"/> EM&V | <input type="checkbox"/> Trade Ally/Contractor |
| <input type="checkbox"/> Engineering Firm | <input type="checkbox"/> Training |
| <input type="checkbox"/> Financing | <input type="checkbox"/> Virtual Audits |
| <input type="checkbox"/> Implementation Firm | <input type="checkbox"/> Wholesaler/Distributor |
| <input type="checkbox"/> Lighting | <input type="checkbox"/> Other (please describe below) |
-

Supplier Commitment to Diversity

Puget Sound Energy values diversity, equity, and inclusion. Procurement practices diversity, equity, and inclusion through its Supplier Diversity process designed to: achieve best value in contracting; provide fair and equitable opportunity to contract with PSE and strengthen our diverse communities by leveraging local businesses.

- 5. Describe how your company/program supports PSE's commitment to diversity, equity, and inclusion.
- 6. What relationships do you have with ethnic minority business enterprises, women business enterprises, LGBTQ business enterprises, and service disabled veteran businesses to support PSE's overall commitment to empower our communities?
- 7. What certifications or designations does your company have with diverse/minority/women/veteran certification agencies (i.e. WBENC, WOSB, MBE)

Section 2 - Product Summary

Respond in less than 5 pages. Be specific, avoid broad general statements. Provide specific information regarding your proposed product/service, and how it aligns with PSE's Critical Requirements, Focus Areas and Priorities. It is essential that the response is thorough yet concise, and avoids broad, unenforceable, or unmeasurable content. Use the format and titles outlined below.

a. Categorizing Your RFI Submittal

Describe which focus area your idea would fall under from the following list:

- A new and innovative way to deliver existing program design
- Streamline the delivery of existing programs
- Enhancement of existing portfolio savings with a new product, service or approach.

b. Identify Hard-to-Reach Segments Served:

Please include a description of the hard-to-reach or underserved customers serviced through this proposal (if applicable). Include all that apply.

- Rural
- Small Business Owners
- Commercial Tenants
- Industrial Customers
- Commercial Kitchens
- Multifamily Tenants
- Manufactured Home Dwellers
- Single Family Rentals
- Low/Moderate Income
- Other (Please define)

c. Describe the Product, Service or Program

Consider including details related to:

- Description of opportunities in PSE territory, specific technologies or methods, and why this is the right time to deploy this concept,
- How the concept aligns with PSE's focus areas and priorities,
- Assessment of market demand and readiness,
- Current stage in a typical product or service lifecycle (Introduction, Growth, Maturity, Decline),
- Targeted customer segment(s),
- Highlight costs and benefits and any potential barriers to implementation,
- If concept streamlines existing delivery of programs, quantify potential impacts in terms of resources.

d. Delivery Model

Provide a high-level concept on how the program modification, technology or action would be delivered. If additional sub-contractors would be required, please describe roles, and how they would be managed.

e. Energy Savings Potential

Explain, provide examples, charts, or other detail on how the proposed program modification, technology or action has significant potential to provide cost-effective, quantifiable, measureable and reliable energy savings.

Section 3 – Proof of Concept References

Provide up to 3 references that are currently utilizing the proposed concept or product in the following format. Please limit to 1 page, this is for informational purposes only and references will not be contacted as part of the RFI process.

- Company Name
- Company Location
- Overview of Idea: One (1) paragraph description includes overall concept, benefit to customers, and success of a previous project (if applicable).
- Link to Example of Product (Optional)

b. EMAIL ATTACHMENT 2: Additional Information

This is an optional opportunity to attach company overview, staff qualifications, case studies, product details, savings details, awards, testimonials, etc. High-level “sales” material should not be used within the RFI Response attachment.

Additional Information may only be reviewed in the event that PSE determines that the proposed concept is feasible and may inform an RFP. Additional Information must be attached as one file in Word, PDF or Excel format.

Reminder that PSE email system will not accept emails greater than 10MB and that the system will not accommodate .zip files.