

Request for Proposals Conservation Resource Potential Study

Northern Wasco County PUD (PUD) is seeking proposals from qualified consultants for services to submit a proposal with costs, for a study of all classes of customers and individual customers of the PUD to assess the available megawatt hours (MWH) of conservation the PUD's customers can achieve in the future.

Services may include but are not limited to:

- Survey and analysis of energy usage by residential, commercial, institutional, industrial and agricultural customers in the PUD service area.
- In each sector two separate supply curves will be provided, retrofit conservation resources and lost opportunity conservation resources (i.e. conservation resources associated with new or expanding retail loads) that are forecasted to come on-line during the forecast period.
- Each supply curve shall quantify the amount of energy savings available (in MWHs per year) at each of the following levelized cost levels in 2008 dollars: i)\$20/MWH; ii)\$30/MWH; iii)\$40/MWH; iv)\$50/MWH; v) \$60/MWH.

A copy of the full Request for Proposal packet can be obtained from:

Steve Holmes
Northern Wasco County PUD
2345 River Road
The Dalles OR 97058
541-298-3311
www.nwasco.com

Interviews may be conducted if deemed necessary by the PUD. Evaluation of the consultants will be made on the basis of individual written proposals. Consultants submitting proposals will be considered upon the following general criteria:

- The consultant's understanding of the method of approach to the study.
- Experience with similar projects, technical proficiency and previous client references.
- Total cost of consultant's proposal.
- Commencing study and completion in a timely manner.

Consultants desiring considerations should submit complete proposals with all pertinent data to: Steve Holmes, Northern Wasco County PUD 2345 River Rd The Dalles, OR 97058

REQUEST FOR PROPOSAL
FOR
CONSERVATION RESOURCE POTENTIAL STUDY
FOR
NORTHERN WASCO CO. PUD

Northern Wasco County PUD
2345 River Road
The Dalles, OR 97058
(541)296-2226

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INTRODUCTION

Northern Wasco County PUD (PUD) is seeking proposals from qualified consultants for services to provide a conservation resource potential study. This study would include all classes of customers served by the PUD.

It is anticipated that the conservation resource potential study would start as soon as possible after awarding of the RFP and be completed within six months.

SUBMITTAL OF PROPOSAL

Six (6) copies of the proposal must be received no later than 3PM Monday, June 30th, 2008. Neither late nor faxed submittals will be accepted.

Submit proposals to: Steve Holmes
 Northern Wasco County PUD
 2345 River Road
 The Dalles, OR 97058

The proposal and copies shall be in a sealed envelope, plainly marked: "Proposal – Conservation Resource Potential Study" and show name and address of the submitting consultant.

SCOPE OF WORK

The objective of this study is to survey and assess the energy usages of all classes of PUD customers. The purpose of the study is to identify and project conservation resources in Megawatt Hours (MWH) by customer classes and or individual customers.

The Conservation Resource Potential Study shall include but not limited to:

- A study of the history of conservation efforts by the PUD and their customers.
- Survey and analysis of energy usage by residential, commercial, institutional, industrial, and agricultural customers in the PUD service area.
- In each sector two supply curves will be provided: retrofit conservation resources and lost opportunity conservation resources (i.e., conservation resources from new or expanding retail loads) that are forecast to come on-line during the forecast period.
- Each supply curve shall quantify the amount of energy savings available (in MWHs per year) at each of the following levelized cost levels in 2008 dollars: i) \$20/MWH; ii) \$30/MWH; iii) \$40/MWH; iv) \$50/MWH; and v) \$60/MWH.
- Supply curves should reflect the technical resource potential before any reductions for cost effectiveness or achievability.
- Supply curves should identify the range of quantities of conservation that could be acquired across a range of levelized costs.
- At each levelized cost level of each supply curve, estimates shall be provided of annual energy savings allocated into months or seasons, and heavy load and light load hours.
- Consultant shall provide two estimates each of the PUD's share of associated costs for each measure by sector. Details to include estimates of the PUD's cost and the customer's costs. These costs should reflect the MWH savings that produce a simple pay back of 3 years, 5 years, and 10 years for the customers.
- The consultant shall provide to the PUD all of the data, assumptions and spreadsheets used to prepare the Conservation Resource Potential Study.

PROPOSAL INSTRUCTIONS

To be considered, all proposals shall include:

A general description of how the consultant plans to approach the study, an itemization of all the studies cost by task, and three references for similar studies they have completed.

The proposal must not exceed 15 pages, including the required cover sheet. A page is considered to be one side of a single 8 ½“ x 11” and the minimum size font is 12 point for the main text. Consultant may use their discretion for font size of graphics, charts etc.

The proposal must be organized in accordance with the list of proposal contents.

PROPOSAL CONTENTS

To be considered a proposal must contain, but not limited, to following contents:

1. **Consultant's Capabilities:** This relates to the consultant's capabilities with regard to the requested services. The consultant shall describe their qualifications, and resources required to perform all the activities. References listed on the Cover sheet or additional references may be included in the evaluation of this criteria.
2. **Project Understanding:** The consultant should demonstrate a clear and concise understanding of the proposed study based on existing information. This should also include a general description of the purpose of the study and the chief issues to be addressed.
3. **Project Approach:** The Consultant should clearly define the desired actions to be taken to perform the tasks identified in the scope of work. It should include the proposed schedule for design, development and delivery. Include a description of major tasks, milestones, and staff assignments.
4. **Supportive Information:** May include graphs, charts, photos, resumes, additional references etc. This may include familiarity

with local geographical, governmental and regulatory considerations.

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PROPOSAL EVALUATION AND CONSULTANT SELECTION

The PUD will award the contract to the consultant whose proposal would be most advantageous to the PUD.

Interviews may be conducted with the top ranking consultants at the PUD's option.

The consultant selection process will be carried out under ORS 379.051. The proposal will be evaluated on the completeness and quality of content as described in the **Proposal Contents** section and the evaluation criteria described in this section.

Evaluation criteria: This identifies the evaluation criteria and their respective scores. Each proposal will be limited in length and judged as a demonstration of the consultant's capabilities and understanding of the services requested. Consultants submitting more than the specified number of pages will be considered non-responsive and their proposals will not be considered. Evaluation factors and maximum points will be as follows

| <u>CRITERIA</u> | Number of pages | Maximum Scores |
|--|------------------------|-----------------------|
| Cover sheet, and content of references | 2 | Pass/Fail |
| Proposal format and length | | Pass/Fail |
| Project understanding and approach | | 50 |
| Consultant's capabilities | | 25 |
| Cost | | 25 |
| TOTAL PAGES & TOTAL SCORE | 15 | 100 |

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INQUIRES

Technical questions or requests shall be directed to:

Steve Holmes
Energy Specialist
Northern Wasco County PUD
2345 River Rd
The Dalles, OR 97058
541-298-3311
Fax 541-298-3320

Procedural or administrative questions that arise prior to the Proposal deadline shall be addressed to:

Steve Holmes
Energy Specialist
Northern Wasco County PUD
2345 River Rd
The Dalles, OR 97058
541-298-3311
Fax 541-298-3320

Any questions should be submitted 7 days prior to the proposal submittal date.

GENERAL INFORMATION

Within sixty (60) days after the opening of the Proposals, the PUD will act upon them.

The PUD reserves the right to reject any or all Proposals upon good cause findings, if it is in the public interest. The PUD is not liable for any costs the consultants incur while preparing or presenting the Proposals. All Proposals will become part of the public file without obligation to the PUD.

The PUD may require any clarification or change it needs to understand the selected consultant's project approach. Any changes will be made before executing the contract and will become part of the final contract.

The PUD intends to enter into contract negotiations with the highest ranked consultant. The negotiations shall be directed toward obtaining written agreement on the consultant's tasks, performance, schedule, and a maximum, not to be exceeded, contract price. The price will be consistent with the consultant's proposal and fair and reasonable to the PUD, taking into account the estimated value, scope, complexity, and nature of the consultant's services.

The PUD may formally terminate negotiations if they fail to result in a contract within a reasonable amount of time. Negotiations will then ensue with the second ranked consultant. The second round of negotiations may be formally terminated if it fails to result in a contract within a reasonable amount of time. Negotiations will then ensue with the third ranked consultant. The third round of negotiations may be formally terminated if it fails to result in a contract within a reasonable amount of time. Thereafter, services of a qualified consultant may be obtained through the direct appointment procedure as per OAR 137-035-0040.

In any event, the PUD will award a contract to the consultant who's Proposal would be most advantageous to the needs of the PUD.

The selected consultant will be required to assume responsibility for all services outlined in the RFP, whether the consultant or a representative produces them.

The PUD considers the selected consultant responsible for any and all contractual matters.

The successful consultant must have Workers' Compensation insurance and covering work in Oregon and submit proof of insurance of Professional Liability insurance equal to or greater than \$2 million. The successful consultant must also submit documents addressing insurance, non collusion, tax law, debarment and conflict of interest as part of the personal services contract.

Protests concerning the consultant selection process must be delivered in writing to the PUD within 14 days of the award announcement. Protests must specify the grounds upon which the protest is based. The PUD will review the protest, decide on appropriate action and contact the involved parties. The decision will be presented to all parties within the 45 calendar days of receipt of the protest and will be the final PUD position.

In accordance with ORS 279.555(2) consultants shall use recyclable products to the maximum extent economically feasible in the performance of the contract work set forth in this document.

ATTACHMENT A
COVER SHEET

STATEMENT OF PROPOSAL

Name of Firm _____

Mailing address _____

Contact Person _____

Telephone _____ Fax _____

Email address _____

_____(Name of Firm) accepts all the terms and conditions contained in the Conservation Resource Potential Study Request for Proposal dated April XX, 2008 and the attached sample agreement:

Signature of authorized representative Date

Type name of authorized representative Date

Type name of person(s) authorized to negotiate contracts

Type name of person(s) authorized to sign contracts

ATTACHMENT B

COVER SHEET

Page 2

REFERENCES

Reference #1

Telephone #

PROJECT TITLE

Contact Person

Reference #2

Telephone #

PROJECT TITLE

Contact Person

Reference #3

Telephone #

PROJECT TITLE

Contact Person