



REQUEST FOR PROPOSALS

Commercial HVAC Measure Development Support May 10, 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 2024 RTF Work Plan allocated resources to identify and develop new RTF measures and improve the savings shapes of new and existing measures. For this RFP, the RTF is seeking a contractor(s) to support the expansion and refinement of its HVAC measure suite for medium to large commercial buildings, which are defined here as buildings larger than approximately 10,000 square feet.

For this project, the RTF anticipates the following tasks:

- **Task 1—Assessment:** Contractor should review the current RTF¹ and Council 2021 Power Plan measures² for commercial HVAC, identify measures in need of refinement or revision, and identify any gaps in the portfolio of existing and queued new measures³ for medium to large commercial HVAC. For the existing measures, contractor should review the savings shapes, data sources, assumptions, baselines, and savings methodology and recommend any opportunities for refinement or revision. For new measures, contractor should briefly scan the current market and existing stock for potential measures with high savings potential in the region.
 - *Deliverable and Timeline:* By July 5th or three weeks following the start of the contract, contractor will provide RTF and Council staff with either a memo, presentation, or workbook that details the recommended updates to the existing RTF and Council commercial HVAC measures and provides a summary and ranking of the potential new measures to consider.
- **Task 2—Existing Measure Update and New Measure Scoping:** For two of the RTF and Council’s existing commercial HVAC measures and any new high savings potential measures identified in Task 1, contractor will gather the relevant data and resources to support updates or future development of these measures, including but not limited to estimates of: annual energy savings by baseline and building type, incremental cost, lifetime, 8760 hourly savings shape, and regional energy savings potential. Anticipated measures that would be covered in this task include the following list of measures, in addition to any new measures identified in Task 1:⁴

¹ All existing RTF commercial HVAC measures can be found within the RTF work products posted online here: <https://rtf.nwcouncil.org/work-products/>. The list of measures includes, Advanced Rooftop Controls and Commercial Packaged Terminal Heat Pumps.

² The 2021 Power Plan commercial HVAC measures can be found here: <https://nwcouncil.app.box.com/folder/110979607625?s=u0dgjxkoxoj2ttym81uka3wrjcy6bo6>. The list of measures includes advanced rooftop controls (ARC), chillers, ductless and ducted air source heat pumps, packaged terminal heat pumps, unitary air conditioners, variable refrigerant flow (VRF) heat pumps with dedicated outside air systems (DOAS), and VRF with DOAS and heat recovery.

³ Queued new measures include efficient chillers, VRF systems, DOAS with and without heat recovery, and high efficiency rooftop units.

⁴ For any existing and new measures being scoped or developed that require modeling in the RTF’s commercial modeling tool, [ModelKit](#), contractor is expected to complete this modeling. Contractor will not be expected to conduct a full calibration of the model, but at a minimum will compare modelled results against best available data. If contractor identifies a bug or issue with the current version of Modelkit, they will not be expected to address or correct this issue as the RTF has an existing contractor supporting Modelkit issues and bugs for 2024 project work.

Advanced Rooftop Controls*
Unitary AC*
Demand Control Ventilation (non-commercial kitchen applications)
Heat and Energy Recovery Ventilation
Ground Source Heat Pumps
Thermal Storage Heat Pump Systems

*Existing RTF or Council Measure

- *Deliverable and Timeline:* By September 30th (expect individual measure deliverables will be staggered over this timeline), contractor will provide Council and RTF staff with the relevant data, documentation, and workbooks on the measures proposed under this task.
- **Task 3—New Measure Development:** The RTF will consider up to four new commercial HVAC measures for development in 2024. Contractor will develop the analysis and resources for selected new measures in collaboration with RTF contract analysts. Contractor with assigned RTF contract analyst will present the new measure to the RTF at an in-person or webinar-only RTF meeting for the RTF decision on adoption. Upon adoption of measure by the RTF, contractor in collaboration with RTF contract analysts, will support the finalization of the workbook and analysis following review by the QA/QC contractor. Contractor will align with the RTF Guidelines and process for the development of selected measures. At this time, priority measures in queue for development include Chillers, Chiller Optimization, DOAS with HRV, and DOAS with VRF, but others will be considered based on details in proposals or findings from Task 1. Priority for new measure development is for electric-only technologies, though dual fuel measures will also be considered.
 - *Deliverable and Timeline:* Contractor will provide all workbooks and resources two weeks prior to RTF meeting presentation, as well as attend and present the new measure(s) to the RTF for decision. Timeline target would be to have all new measure work completed by the end of the calendar year, but pending RTF meeting agenda availability, presentation to the RTF could be as late as February 2025 with QA/QC taking an additional six weeks expected by end of March 2025.

III. Timeline, Budget Expectations, and Proposal Scope

Budget: The RTF estimates that the budget for this project will vary significantly based on the number of new measures determined. The RTF estimates costs for Task 1 will be up to \$5,000, Task 2 approximately \$40,000-60,000, and Task 3 an estimated \$50,000 per measure. The RTF reserves the right to revise this budget. Proposers shall include the proposer’s estimated costs per task and measure (both new and existing measures noted above), irrespective of the RTF’s estimated budget. Proposals should be based on time and materials, with a not-to-exceed limit, and include a detailed cost estimate.

Timeline: The RTF would like all tasks completed by the end of the 2024 calendar year, but depending on RTF meeting agenda availability, presentation of new measures may be as late as February 2025 with completion of QA/QC taking an additional six weeks expected by end of March

2025. Proposers including new measure development should take into account the full timeline of RTF measure development detailed in the subtask.

Proposal Scope: The RTF will consider proposals for all or a portion of the full scope of this project, meaning that proposal scope can be for all HVAC technologies under a specific task and for one or more tasks or a specific set of HVAC technologies within one or more tasks. Therefore, all proposals, regardless of scope, need to provide a detailed budget by task and measure. Additionally, all proposers need to demonstrate expertise in all HVAC technologies covered by their proposal.

IV. How to Submit a Proposal and Required Elements

Proposals shall be submitted to the RTF in electronic format by **June 7, 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, RTF Contract Analysts, and RTF Operations Subcommittee. 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:	June 7, 2024
Selection of Winning Proposal(s):	Week of June 10, 2024
Project Start Date:	Week of June 17, 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](#).