

Request for Qualifications (“RFQ”):

RFQ #53568

Analyses of End-Use Load Research Data



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1 Introduction

Northwest Energy Efficiency Alliance, Inc. (NEEA) is an alliance of more than 140 utilities and energy efficiency organizations working on behalf of over 14.5 million energy consumers across Idaho, Montana, Oregon, and Washington (“the Northwest Region”).

Since 1996, NEEA has taken a market-driven approach to energy efficiency that is grounded in data, collaboration, and rigorous evaluation. NEEA works to transform markets by filling information gaps and identifying and removing barriers so that the market can align around evolving electric and natural gas energy efficiency needs. For more information, visit neea.org.

1.1 Acronyms and Definitions

The following acronyms, definitions, and terms provide relevant information:

Term	Definition
Applicant	Any individual or firm who submits an RFQ response to be considered a QP
CBSA	NEEA’s Commercial Building Stock Assessment building characteristic and energy use study
CEMS	Commercial Energy Metering Study conducted pursuant to EULR
Collaborators	A collaborative of organizations with vested interest in EULR, including: Avista, the Bonneville Power Administration, Clark County PUD, Energy Trust of Oregon, Eugene Water & Electric Board, National Renewable Energy Laboratory, Northwest Power and Conservation Council, PacifiCorp, Portland General Electric, Puget Sound Energy, Seattle City Light, Snohomish County PUD, Tacoma Power, and the U.S. Department of Energy Building Technologies Office.
Contractor	A party who has been awarded and has executed a contract with NEEA and as further set forth in Section 6
EULR, Study	NEEA’s End-Use Load Research project
HEMS	Home Energy Metering Study conducted pursuant to EULR
NPCC	Northwest Power and Conservation Council
Program Manager	NEEA staff member Ben Spearing, who has been assigned to manage this RFQ
Proposal	Document provided to NEEA by Applicant that outlines the expected work to be completed for a given Project. At a minimum, a Proposal must include a scope, budget, and timeline.
QP(s)	Qualified Party/Parties – any individual or firm who NEEA considers and will solicit for future

	work based on demonstrated qualifications and expertise and that has been approved through the RFQ process.
RBSA	NEEA's Residential Building Stock Assessment building characteristic and energy use study
RTF	Regional Technical Forum
Stakeholders	Individuals, organizations, and industry personnel that rely on the data collected by EULR
Steering Committee	A group of executives representing NEEA's Collaborators. This group has final decision-making authority for all aspects of EULR.
Working Group	A group of utility program implementers, planners, and senior analysts representing Stakeholders.

2 RFQ Background

EULR is a collaboration between NEEA and its Collaborators. NEEA and its Collaborators have metered time-differentiated residential and commercial electric load data for key end uses in the Northwest Region. Over 400 participating residences and end uses have been metered for up to seven (7) years from their circuit panels, primarily for HVAC and large appliance circuits. The publicly available data is metered at fifteen (15)-minute intervals, while data proprietary to the Collaborators is metered at one (1)-minute intervals. Information that could be used to identify individuals personally has been removed throughout the Study. For nearly all of the metered homes in HEMS, the RBSA can be linked to access detailed descriptive information, as many of the sites that were metered in HEMS were also surveyed in the RBSA. Similarly, the CBSA can be linked to CEMS, as many of the sites that were metered in CEMS were also surveyed in the CBSA. The RBSA Metering Study dataset obtained from work following the RBSA's conclusion also proves to be particularly useful, as it provides end-use metered data for residential homes as compared to the circuit-level data in HEMS.

To date, NEEA's limited research has focused on the operation of electric end uses post-installation for extensive time periods in occupied homes. Data from HEMS and CEMS alongside data from the RBSA Metering Study and CBSA provide a unique opportunity to examine end-use electricity demand in varied situations. Data is available on end-use electricity demand as well as details about the household or commercial building, including levels of occupancy, construction type, size, outdoor temperatures, insulation, windows, and types of end uses.

EULR residential and commercial fifteen (15)-minute load data, the RBSA report and data, the CBSA report and data, and the RBSA Metering Study report and data can be found at the links below:

- [End-Use Load Research](#)
- [Residential Building Stock Assessment](#)
- [Commercial Building Stock Assessment](#)
- [RBSA Metering Study](#)

3 Objectives

In 2025, NEEA and its Collaborators completed the Study's data collection portion and removed metering equipment for approximately 400 homes and 70 commercial buildings across the

Northwest Region. Initial meter installations for homes and buildings were conducted in phases, with some homes and buildings being metered across years of different weather patterns and levels of occupancy. After investing substantial time and effort collecting data, NEEA and its Collaborators believe that many important questions may be answered with analyses of HEMS' and CEMS' datasets, both individually and in combination with the RBSA and CBSA.

To answer their important questions, NEEA and its Collaborators will identify QPs that can help pull value from these expansive datasets. Applicants will be asked to submit ideas for useful analyses of the HEMS and CEMS datasets listed in Section 4 alongside their qualifications, but NEEA encourages the submission of additional analysis ideas outside of those listed, even after an Applicant is selected as a QP.

The primary objective of this RFQ is to identify QPs capable of conducting rigorous and relevant analyses of EULR data. These analyses are intended to support utility and Stakeholder decision-making in the Northwest Region across a broad range of applications, including but not limited to energy efficiency, resource planning, demand response, state or local policies, rate design, distribution planning, and power quality. Potential beneficiaries of these analyses could be energy efficiency program designers and implementers, integrated resource planning and forecasting staff, demand response program designers, utility planners, distribution engineers, rates teams, and many others.

4 Submission Requirements for Qualifications

NEEA encourages Applicants to submit references and analyses portions of their Proposal(s) (as set forth in greater detail in Section 4.1) to demonstrate skill and expertise in the following areas and topics:

- End-use load research
- AMI or other Interval Load analytics
- Load forecasting
- Capacity planning
- Integrated Resource Plans
- Demand response potential
- Energy efficiency program planning and evaluation
- Distribution planning
- Grid operations and reliability
- Rates and pricing
- Large dataset manipulation
- Sample design and weighting
- Statistics
- Other ideas submitted by QPs

4.1 Submission Requirements

Applicant submission must include the following:

1. **Cover Letter (1-page maximum)** – Include an overview of Applicant's organization, including its rationale as to why it is a good fit.

2. **Project Team Identification (2-pages maximum)** - Provide information regarding the proposed project team, including company background, hierarchical team structure, and any subcontractors that Applicant intends to hire. Applicant should place Project team bios and/or resumes in the Appendix section.
3. **Rate Sheet (1-page maximum)** – Provide a rate sheet showing hourly costs for staff that would participate in Project(s).
4. **Resource Availability (1-page maximum)** – Provide an overview of resource availability, (for example, limitations to staff hours due to prior engagements) from January 2027 to December 2028.
5. **References (6-pages maximum)** – Include high-level summaries of at least three (3) case studies or links to at least three (3) case studies or other projects that demonstrate Applicant’s capabilities relevant to this Project.
6. **Possible Analyses (4-pages maximum)** – Provide examples of analyses that could be completed using HEMS and CEMS data in the form of high-level summaries.
7. **Appendices** – Appendix materials do not count against the thirteen (13)-page maximum and could include the following.
 - a. Project Team Bios and Resumes: If Applicant’s Project team will include any contributors for which NEEA does not have a current resume on file, please include a copy of their resume in the Appendix section.
 - b. Additional project references: Applicant may provide links to reports or include a summary of previously completed project(s) that demonstrate Applicant’s capabilities as they relate to this Project’s work.

4.2 Approach and Methodology

Awarding of Contracts

After NEEA qualifies an Applicant as a QP through this RFQ, NEEA and the Working Group will review the analyses recommended in that Applicant’s Proposal. NEEA and the Working Group will vote on which, if any, of these analyses should be pursued (each analysis to be pursued a “Project”), and the QP will be requested to provide a supplemental proposal (including, at a minimum, a scope, budget, and timeline) for each of their Proposal(s) that have passed a vote.

NEEA, the RTF, the NPCC, and the Working Group have already identified certain analyses that utilize HEMS and CEMS data that would provide a large benefit to the Northwest Region. No later than November 13, 2026, they will compare the Projects to the information provided by the QPs chosen through this RFQ to decide which QP(s) are most qualified to perform each Project. When a QP’s Proposal has been matched with a Project, that QP will be requested to provide a supplemental proposal, as further elaborated on and specified by NEEA, the RTF, the NPCC, or the Working Group. This process will be repeated whenever NEEA and the Working Group identify new Projects throughout the future.

Supplemental Proposals will be reviewed and voted on by NEEA and the Working Group. If NEEA and the Working Group vote to approve a Proposal, then contracting will commence with NEEA under the guidance of the Program Manager; if the Proposal does not pass this vote, then the Project will re-enter the pool of potential analyses to be matched with a different QP.

Performing Analyses

Contractors who have been awarded and executed contract(s) with NEEA to undertake a Project must keep NEEA and the Working Group informed of progress, adherence to timelines, challenges, and preliminary Project results. Contractors may be asked to present directly to the Working Group or Steering Committee to update them on preliminary results, important findings, and decision points for analysis. In addition, QPs will be expected to participate remotely in ongoing meetings with NEEA to discuss progress, as requested by NEEA and as frequently as on a weekly basis.

NEEA and Collaborators will expect Contractors to employ and record appropriate methodologies. Methodologies rely heavily upon the analysis being performed but may include development of weather-normalized and actual one (1)-minute interval load shapes¹, descriptive statistics, including analysis of variance, measuring performance, and operational phases of end-use equipment, multivariate regression, mixed integer linear programming, load forecasting, and scenario analysis.

Analytical results should be rigorous, accurate, valid, and reliable in interpreting data and drawing conclusions; they should include appropriate methodologies and transparent reporting of findings, including confounding factors. Findings should be clear, concise, and replicable by third parties.

Each Project will be concluded with a report that has been reviewed by NEEA and the Working Group and a presentation at a Working Group meeting. Reports are expected to be well-formatted, professionally drafted and proofread, and easy to follow, to comprehensively detail the results and methodologies of the Project, and to outline how the report could inform future analyses. Presentations will have an accompanying slide deck for use in a presentation that should last for thirty (30) to ninety (90) minutes, and will be recorded for future viewing by NEEA and the Working Group.

The Working Group has the authority to approve each Project up to \$100,000 in total costs. Proposed Projects that cost above \$100,000 will require approval from the Steering Committee.

5 RFQ Schedule and Considerations

In order to be considered for initial Projects, Applicants must submit (1) electronic copy of their Proposal(s) by 5:00 p.m. PST on October 11, 2026. Submissions will continue to be accepted as long as they are submitted prior to 5:00 p.m. PST on July 16, 2027 under the guidelines specified below. NEEA may alter or adjust the Schedule in its sole discretion, without further notice.

5.1 RFQ Schedule

October 2, 2026	Deadline to submit questions
October 9, 2026	Answers to questions e-mailed back
October 11, 2026	First Deadline to submit Proposal(s)*
October 16, 2026	NEEA to begin evaluating Proposals
July 16, 2027	Second deadline to submit Proposal(s)*

*October 11, 2026 is the deadline for Applicants to submit Proposal(s) for topics from Section 4; any Applicant who has been designated a QP may suggest new and novel Proposal(s) for topics not included in Section 4 until July 16, 2027.

¹ Provided the use of this data is approved by the Steering Committee, in its sole discretion.
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5.2 RFQ Point of Contact

All correspondence, including but not limited to questions and submissions, shall be directed to:

Ben Spearing
Program Manager
Northwest Energy Efficiency Alliance
bspearing@neea.org

6 Selection Criteria and Insurance Requirements

6.1 RFQ Scoring and Evaluation

Applicants will be rated among others in terms of the overall responsiveness to the RFQ (i.e., how well Applicant addresses all RFQ requests), including but not limited to:

1. Responsiveness to Section 4.1-RFQ Submission Requirements.
2. Relevant experience of the Applicant.
3. Demonstrated capability to execute similar work for other organizations.
4. Experience and qualifications of the individuals specifically proposed to execute and manage the Project.
5. The capability to execute the plan, including past experience and aptitude for collaboration.
6. Overall value for expenditure.

Applicant's Proposal will be evaluated by NEEA and, potentially, others with the perspective and knowledge needed to make this important decision, as determined by NEEA. NEEA treats all Proposals as confidential.

NEEA is under no obligation to pre-qualify or provide future contracted work to any Applicant responding to this RFQ, nor is there any obligation or intent implied to reimburse any Applicant for the cost of preparing a proposal in response to this RFQ. Moreover, Applicants have no right or expectation to obtain prequalification or any future contracted work absent a subsequent written contract agreed to by NEEA and the contracted party in writing.

6.2 Insurance Coverage

Note: Contractors engaged to work with NEEA must maintain adequate and reasonable insurance for their performance as independent contractors and should be aware of the following policy requirements:

- Commercial General Liability insurance of at least \$1,000,000/occurrence;
- Professional Liability Insurance of at least \$1,000,000/combined single limit;
- Business Automobile Liability insurance;
- Any workers' compensation and unemployment insurance required by law; and,

NEEA's insurance requirements are compulsory unless otherwise determined by NEEA, in its sole discretion. NEEA may request documentation evidencing such coverage in a form determined sufficient by NEEA prior to awarding work under any subsequent contract with any QP.