



Jan. 7, 2025

Subject: Puget Sound Energy
Customer Energy Management
2026-2027 Demand Side Energy Management Services Request for Information

Dear Potential Respondent:

Puget Sound Energy, Inc. (PSE) is soliciting written responses for **new and innovative demand side energy management services** for the 2026 through 2027 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 you are responding about.

DEADLINE UPDATE: Electronic responses must be received **no later than 5 p.m. Pacific Time, Feb. 18, 2025**, at 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

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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 services**. The purpose of this Request for Information (RFI) is to solicit information on new and innovative products and services that could be incorporated into energy management programs for PSE customers in the 2026-2027 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. Services must result in either: (i) direct and measurable natural 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 RFP process. PSE, in its sole judgement, will determine with whom to engage in further discussion and/or request a proposal through a standard RFP process.
- c. Any products shared through this RFI should be available for implementation starting Jan. 1, 2026, and ending Dec. 31, 2027.
- 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 an 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.

¹ For the purposes of this RFI, existing programs are defined as those currently in operation for the 2024-2025 biennium.

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 2026-2027 Focus Areas and Priority Considerations in order to be considered for a future program concept.

Critical Factors

All proposed concepts must:

- Comply with Conservation Tariffs: Electric 83² and Natural Gas 183³
- Deliver energy savings
- Meet PSE program cost-effectiveness standards
- Provide evaluable, measurable, and verifiable outcomes
- Maintain a reasonable direct benefit to customer⁴/program administrative cost ratio

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 of energy efficiency measures, demand response (DR), and decarbonization
- Directly benefit customers who face higher burdens to participate in programs (with special emphasis on Named Communities as described in the [Clean Energy Implementation Plan](#)).
 - PSE has a goal of at least 30% energy benefits reaching customers in Named Communities and 6% reaching customers in Deepest Need.

Anticipated Focus Areas for 2026-2027

Proposed concepts should highlight how the respondent'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**. Respondents may include co-deployment opportunities for any of the topic areas below.

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

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)

- Engineering savings analysis software library, including analysis tools for:
 - Air compressors, refrigeration, HVAC, strategic energy management regression analysis, process operations and maintenance (O&M), and financial analysis
- Resource for customers to identify DSM opportunities such as cost/payoff aids
- Software that provides a post-project report to customers on energy savings and utility bill reduction and next-step recommendations
- Software that works across a large variety of energy-consuming consumer products that enables customers to easily view and adjust their energy consumption in real time
- **Program Implementation**
 - Fixed cost installation heat pump water heater (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 identify and provide in-home service for customers that can most benefit from in-person home energy assessments
 - Proven innovative sales models and services for tying brick-and-mortar sales with online consumer information and promotions
 - Self-install energy-saving products that can be promoted and sold via the PSE Marketplace
 - Solar water heating/pre-heating solutions for both residential and commercial applications
 - New Construction innovations
 - Energy Use Intensity (EUI) based approaches (or other whole-building approaches)
 - Performance-based approaches
 - New and creative ways to provide non-cash or cash-equivalent incentives for participating customers
 - Weatherization Assistance innovations
 - Program designs that increase the bandwidth of current income-eligible programs and address service gaps
 - Program designs that increase service to multifamily properties
 - Programs focused on targeting the industrial sector
 - Programs focused on small industrial customers
 - Compressed air leak detection and repair program
 - ASHRAE Level 2 Audits — support for select customers to meet Washington 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
- Program focused on helping customers comply with Tier 2 of Washington state's Clean Building Performance Standards
- Program to increase adoption of advanced roof top controls (ARC) & commercial connected thermostats
- Commercial Whole Building Performance-Based program
 - Baseline and savings verification from building meter data
- Small to Medium Commercial Building Strategic Energy Management
 - Monitors and evaluates building performance
 - Directly or indirectly implements operational and maintenance measures
 - Utilizes existing and supplemental controls and sensors
- Strategic Energy Management (SEM) energy scans
 - Customer site energy scans
 - Training for Energy Management Engineers (EMEs) to perform energy scans
- Demand Response (DR) participation enhancements
 - Targeted implementation of DR-enabled devices, programs, or services in Named Communities, areas experiencing reliability concerns, or grid-constrained areas
 - Enhanced or innovative DR incentive delivery for Named Community and/or deepest need customers
 - Battery programs for deepest need single, multifamily, or affordable housing residents, including information campaigns
 - Community-based DR programs including coaching, mentorship, and train the trainer models for Named Communities
- **Outreach**
 - Promotional strategies to reach small industrial customers in Named Communities to encourage participation in PSE's targeted Comprehensive Small Industrial program
 - Culturally relevant outreach and engagement for DR (and/or energy efficiency) programs, especially low English proficiency (LEP) customers or immigrant communities

- **Non-Traditional or Non-Conservation Programs and Support Services**

- Programs and support services that enable or leverage Inflation Reduction Act (IRA) tax credits and incentives for customers including:
 - Home Efficiency Tax Credits
 - Whole House Rebates (HOMES)
 - Efficient Commercial Buildings Deduction
 - Rural Energy for America Program (REAP)
- Services that meet the requirements of the Washington State Climate Commitment Act (CCA) that focus on low-income customers and small businesses. These services can include:
 - Weatherization, decarbonization, conservation, and efficiency services
- 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
- Customer support programs for seniors, people with disabilities, LEP, those without reliable internet, and renters to better understand and participate in DR programs

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 2025 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	Dec. 20, 2024
Written Response Submission	Feb. 18, 2025

D. About Puget Sound Energy

Headquartered in Bellevue, Puget Sound Energy (PSE) is proud to serve our neighbors and communities in 10 Washington counties. We're the state's largest utility, supporting 1.2 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 strives to deliver a great customer experience and looks to our contractors to enhance that experience.

Service Area

- 6,000+ square miles, primarily in Puget Sound region of Western Washington
- Population of approx. 4 million within the [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)



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 for 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 helping 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 2025 RFP is issued, PSE will accept questions during that process.

C. Submitting Responses

DEADLINE UPDATE: Responses should be submitted by email to CEMRFP@pse.com no later than 5 p.m. PST on Feb. 18, 2025.

- 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 PSE'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)

EMAIL ATTACHMENT 1: RFI Response

Section 1 - Cover Letter

Please copy and paste the following template and insert the requested information. Limit one 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 services being proposed. Please complete a separate response using this template for each sector.

4. Company specialties. Select all that apply:

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

Supplier Commitment to Diversity

PSE values diversity, equity, and inclusion. Procurement practices diversity, equity, and inclusion through its Supplier Diversity process designed to: achieve the best value in contracting and provide fair and equitable opportunity to contract with PSE and strengthen our diverse communities by leveraging local businesses. To the extent applicable, please respond to the following questions:

1. Describe how your company/program supports PSE's commitment to diversity, equity, and inclusion.
2. 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?
3. 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 fewer than five 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 Submission

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
- New audiences served or engaged

b. Identify Priority Segments Served:

Please include a description of the priority 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
- Low English Proficiency
- Other (Please define)

c. Describe the Service

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 the concept streamlines existing delivery of programs, quantify the potential impacts in terms of resources
- Describe your data privacy and security policies in connection with the types of data utilized with the service
- If artificial intelligence products or services are utilized, describe (1) the specific tool and technology, (2) whether any third party foundational models are used, (3) what data sources are used to train the model(s), and (4) the guardrails and protocols in place for AI governance

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 details on how the proposed program modification, technology, or action has significant potential to provide cost-effective, quantifiable, measurable, and reliable energy savings.

Section 3 – Proof of Concept References

Provide up to three references that are currently using the proposed concept or product in the following format. Please limit to one 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 that includes overall concept, benefit to customers, and success of a previous project (if applicable)
- Link to example of product (optional)

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