Attachment B

Summary Table of Revisions to

PSE's Draft 2022 DER RFP

January 14, 2022 Summary Table of Redlines to DER RFP
(Main RFP document, Exhibit A, Exhibit B, Exhibit C, Exhibit K, Exhibit M)

Comment #	Document Section	Summary of Change	Page #(s) or Cell #
N/A	RFP, Section 1	Language was added to clarify specific contract models for resource types, associating pay-for-performance contracts, ownership contracts and PPAs with DR, BESS and solar.	2
4.2	RFP, Section 1	1. Replacement of word "BTM" with "Distributed" in description of BESS. 2. Removal of "similar to Demand Response". 3. Removal of language prohibiting export of BTM batteries.	4
5.3	RFP, Section 1	Language was added clarifying that the Preferred Portfolio is not a limitation of what programs PSE will accept.	5
4.2	RFP, Section 2	1. Removal of "Power Purchase Agreement" in Table 4. 2. Removal of language prohibiting export of BTM batteries.	8
3.1	RFP, Section 2	Paragraph describing Technical Specifications for Small Generation Interconnections was updated to note the latest version will not be published till February 2022 and threshold capacity for SCADA will not change.	9
2.4	RFP, Section 2	Language was added to elaborate that respondents unable to meet Exhibit K and B requirements will not be automatically eliminated from evaluation.	10
N/A	RFP, Section 2	Replacement of "fit" with "add" in description of basis.	11
4.2	RFP, Section 2	Revised language to note BTM batteries are not covered under DR since export is allowed.	12
N/A	RFP, Section 2	BESS Maximum Annual MWh Discharged increased from 730 MWh to 1,752 MWh	12
3.4	RFP, Section 2	Revised language to note PSE preference for BESS technology if owned by the Company.	12
4.3	RFP, Section 2	Language was added to explain contracting terms for DR projects in regards to contract length and ramp rate for capacity.	14
4.2	RFP, Section 2	Removal of language prohibiting export of BTM batteries.	15
N/A	RFP, Section 2	Removal of language prohibiting DR events from being called on more than two consecutive days.	16
2.1	RFP, Section 2	Language was revised to note performance payment terms for DR programs delivering contract capacity.	16
2.3	RFP, Section 2	Addition of "if applicable" to Technology Provision to account for programs specifications might not apply to.	18

2.3	RFP, Section 2	Addition of "if applicable" to Operations and Maintenance provision to account for programs it might not apply to.	19
N/A	RFP, Section 2	1. Language added regarding respondent requirements for DER system support and maintenance, requesting details on staffing, response resolution, maintenance and upgrades, as well as long-term plans for standards compliance. 2. Language added regarding customer references.	20
N/A	RFP, Section 2	Language was altered from "A" to "There is a", "apply" to "that apply" and "and there are" to "as well as".	21
2.4	RFP, Section 2	Language was added to elaborate that respondents unable to meet Exhibit K and B requirements will not be automatically eliminated from evaluation.	21
4.1	RFP, Section 2	1. Alteration of "Pricing for Winter Capacity Events" to change units to $/kW-event. 2. Removal of "Total Annual Costs" pricing. 3. Removal of pricing breakdown of: software licensing, equipment capital, equipment installation, equipment maintenance, participant incentives, customer service, tracking and reporting and other. 4. Language added regarding program startup, program administration, program marketing and customer incentive costs.	26, 27
N/A	RFP, Section 2	Alteration of capacity charges by season to event.	27
N/A	RFP, Section 3	Language added to explain vendor service components and how they will be integrated with PSE internal capabilities.	28
3.3	RFP, Section 3	Figure 6 has been updated to better reflect the language and terms used in the RFP.	31
N/A	RFP, Section 4	Table 11 updated to include Concurrent Evaluation timeline.	41
N/A	RFP, Section 4	Language added describing PSE's preference for respondents to provide updated pricing during the BAFO if PSE's chosen VPP vendor is compatible with their platform.	44
2.1	RFP, Section 5	Language added regarding liquated damages not being applied to DR contracts that cannot achieve contractual milestones.	54
N/A	RFP, Section 5	Language added regarding cloud-based software solutions requiring SOCII Type 2 audit completion or estimated completion before July 1, 2022.	55
2.2	RFP, Section 5	Language added regarding cloud based vendors providing a SaaS agreement and SLAs to cover licensing terms, with the MSA covering any additional services.	55

N/A	Exhibit A	Language added to explain the relationship between Category B vendor services and PSE resources in Value Fit programs.	A-1
4.1	Exhibit A	Removal of Table 1 DER Benefit Cost Analysis Tool Cost Categories and associated language in paragraph above, with vendors no longer being required to provide all pricing info.	A-2, A-3
N/A	Exhibit A	Table 1 BCA Model Costs and Benefits added, with associated language above elaborating on elements quantified in BCA model. Updated Table 1 lists out the costs and benefits factored in the BCA.	A-3
N/A	Exhibit A	Language added noting that scoring a "0" on Energy Delivery in the qualitative rubric is disqualification.	A-5
N/A	Exhibit A	Language added regarding SaaS and on premise interface options for the Energy Delivery category in the qualitative rubric.	A-7
N/A	Exhibit A	Table 3, Category A Qualitative Scoring Rubric has been updated with the following changes: 1. Language added to the Technology Risk category of the Project Viability section to note scoring for ownership proposals; successful pilot program with similar technology at PSE equate to a score of 2 and operational experience of similar technology at PSE equate to a score of 3. 2. Language added to the DER/DR project interconnection category of the Energy Delivery section to note proposals with deliverability not being feasible will equate to a score of 0 and proposals with no interconnection app submitted equate to a score of 1. 3. DER/DR aggregators and BESS dispatch category add to the Energy Delivery section to note scoring for on premise (1 point) and SaaS platforms (5 points). 4. BTM DER/DR aggregators category add to the Energy Delivery section to note scoring for proposals that cannot interface with PSE's VPP (0 points) and can interface with PSE's VPP (5 points). 5. Language added to CETA Equity Plan, Customer Benefits section for high quality career opportunities in highly impacted communities or vulnerable populations; non-English materials and outreach being provided to HIC and VP; accessibility to reliable clean energy for HIC and VP; improvement of home comfort for HIC and VP.	A-8 – A-11

		6. Language added to CETA Equity Plan, Business Values section to score respondents certified by OMWBE, WDVA and SBA.	
1.1	Exhibit A	In Table 3, language added to CETA Equity Plan, Business Values section to score respondents based on labor standards in RCW 82.08.962 and 82.12.962 broken out between (1)(c)(i)-(iii).	A-11
N/A	Exhibit A	Table 4, Category B Qualitative Scoring Rubric has been updated with the following changes: 1. Language added to CETA Equity Plan, Customer Benefits section for high quality career opportunities in highly impacted communities or vulnerable populations; non-English materials and outreach being provided to HIC and VP; accessibility to reliable clean energy for HIC and VP; improvement of home comfort for HIC and VP. 2. Language added to CETA Equity Plan, Business Values section to score respondents certified by OMWBE, WDVA and SBA.	A-13
1.1	Exhibit A	In Table 4, language added to CETA Equity Plan, Business Values section to score respondents based on labor standards in RCW 82.08.962 and 82.12.962 broken out between (1)(c)(i)-(iii).	A-14
3.3	Exhibit A	1. Language has been added to describe the IE's role in Value Fit program development. The IE will review initially categorized bids for Value Fit development and the final Value Fit programs. 2. Language has been added to explain additional pricing and proposal information required from respondents.	A-14
N/A	Exhibit A	Language has been added to explain interview requirements with prospective short-listed respondents to clarify proposal, team experience and additional details.	A-15
2.4	Exhibit A	Language was added to describe how proposals that do not meet the requirements of Exhibit K and Exhibit B (Tab 4) will have their capabilities evaluated to determine those that best meet PSE requirements.	A-15
N/A	Exhibit A	Language was added to explain diversity of resources types to be chosen.	A-15
5.4	Exhibit A	Language was added to describe potential metrics that might be updated for the Phase 2 evaluation.	A-15
5.1	Exhibit A	Language has been added to elaborate on the Concurrent Evaluation and how DER proposals will not be removed during this phase; if All-Source shortlisted proposals are displaced during the Concurrent	A-15, A-16

		Evaluation, then previous proposals displaced in Phase 2 will be included in the Concurrent Evaluation.	
N/A	Exhibit A	Language has been added to explain the use of Aurora in the Concurrent Evaluation. The modeling principles and variables used to evaluate the proposals are described further in depth.	A-16
5.6	Exhibit A	1. Figure 1, Evaluation Process, has been added to summarize the evaluation process for Category A and B respondents through the various phases. 2. Language was added to reference Table 11.	A-17
N/A	Exhibit B	Language added to include "Washington State Department of Veterans Affairs (WDVA) and/or U.S. Small Business Administration" in bidder commitment to contracting with SMWBEs question.	Tab 2a
N/A	Exhibit B	Section DER Interconnection Details included requesting voltage level and output capacity for DER.	Tab 3a
N/A	Exhibit B	Section DER Interconnection Details included requesting voltage level and output capacity for DER.	Tab 3b
N/A	Exhibit B	Units for Pricing for Winter Capacity Events and Additional Pricing Element changed from ($/kW-Season) to ($/kW-event).	Tab 3c
4.1	Exhibit B	Estimated Breakdown of Costs by Category was simplified to Program Startup Costs, Program Administration Costs, Program Marketing Costs and Customer Incentive Payments For Winter Peak Events.	Tab 3c
N/A	Exhibit B	Units for All-Inclusive Pricing for Summer Peak Curtailment Capacity changed from ($/kW-Season) to ($/kW-event).	Tab 3c
N/A	Exhibit B	Units for Incremental Pricing for Fast Response changed from ($/kW-Season) to ($/kW-event).	Tab 3c
N/A	Exhibit B	The requirements listed in Tab 4 covering Business, Engineering, IT, Operations and Planning concerns have been rearranged to reflect the layout of Exhibit K. The edits record in Exhibit K below have also been applied to Tab 4.	Tab 4
N/A	Exhibit C	CETA Equity Plan page limit increased from 2 to 4 pages.	C-5
N/A	Exhibit C	Language removed saying that Survey Questions will not count toward your evaluation scoring.	C-6
N/A	Exhibit K	Requirement for minimum capitalization requirements deleted	1.01
N/A	Exhibit K	Requirement for PSE branding or co-branding deleted. Refer to Exhibit M.	1.02
2.4	Exhibit K	Requirement for PSE branding or co-branding was edited to delineate between programs owned by PSE and those that are not.	1.03

N/A	Exhibit K	Requirement for respondent to provide customer complaints deleted. Refer to Exhibit M.	1.04
N/A	Exhibit K	Requirement for specifying communication options for customer deleted. Refer to Exhibit M.	1.07
N/A	Exhibit K	Requirement for indicating customer interests when dispatching an event deleted. Refer to Exhibit M	1.08
N/A	Exhibit K	Requirement to include GHG carbon reduction deleted.	1.09
N/A	Exhibit K	Requirement to provide disclosure to customer at sign-up regarding purposes of obtaining their information and how it will be share deleted. Refer to Exhibit M.	1.12
N/A	Exhibit K	Requirement to provide ability for customer to opt out of a called even deleted. Refer to Exhibit M.	1.13
N/A	Exhibit K	Requirement for respondent to provide information on how non-performance penalties were handled prior deleted.	1.16
N/A	Exhibit K	Requirement for respondent to guarantee load flexibility by month, day and hour basis deleted.	1.17
N/A	Exhibit K	Requirement to rate schedules managed by the VPP transferred to 3.42.	1.20
N/A	Exhibit K	Added language from previous 2.08 regarding safety standards, IEEE 2030.5 communications experience.	Previously: 1.24 Currently: 1.13
N/A	Exhibit K	Requirement for respondent to provide stacked services and have flexibility to meet PSE's evolving needs deleted.	1.27
N/A	Exhibit K	Added language to describe details of project's physical location with GIS data.	2.01
N/A	Exhibit K	Added language to require that respondent provide resource availability and response information.	2.02
N/A	Exhibit K	Added language from previous 3.38, 3.46 and 5.12 regarding: communications over AMI, Cellular and broadband networks; complying with communication protocols (IEEE 2030.5, DNP3 SCADA, Modbus SCADA, SunSpec Smart Inverter Profile, MESA and ICCP); specify experience in communicating via IEEE 2030.5.	2.04
N/A	Exhibit K	Added requirement regarding validation that DER can communicate through LTE cellular or fiber using real-time data with IEEE 2030.5 or DNP 3.0 standards as well as previous experience.	2.05
N/A	Exhibit K	Added language from previous 2.09 regarding adhering to all applicable PSE interconnection processes and technical specifications.	Previously: 2.05 Currently: 2.06
N/A	Exhibit K	Requirement for respondent to specify the voltage level deleted. Refer to Exhibit B.	2.10

N/A	Exhibit K	Requirement for respondent to specify the output capacity deleted. Refer to Exhibit B.	2.11
N/A	Exhibit K	Requirement for respondents to comply with NERC CIP-003-8 R2 deleted; the disperse resource assets meet the minimum requirements for being part of the Bulk Electric System and ALL applicable NERC requirements apply.	3.02
N/A	Exhibit K	Added language from previous 3.32 regarding complying to PSE's Security Addendum.	Previously: 3.31 Currently: 3.30
N/A	Exhibit K	Added language regarding VEN system capability.	3.33
N/A	Exhibit K	Added language from 3.40 and 3.42 regarding ability to interface with VPP.	Previously: 3.37 Currently: 3.35
N/A	Exhibit K	Added new requirement that DER system have the capability to be configured as a OpenADR VEN.	3.39
N/A	Exhibit K	Added new requirement that system be capable of complying with and communicating to DER using smart inverter with its PCS system.	3.40
N/A	Exhibit K	Added new requirement for respondent to have the ability with their PCS system to have rate schedules managed by the VPP.	3.42
N/A	Exhibit K	Language was added to better dine the details of real-time control.	5.03
N/A	Exhibit K	Language was added to explain the target value of less than 15 seconds, but PSE desiring 5 seconds or better.	5.04
N/A	Exhibit K	Language was added to explain the target value of less than 15 seconds, but PSE desiring 5 seconds or better.	5.05
N/A	Exhibit M	Language regarding stationery was removed and combined with the Customer Notifications section below.	M-1
N/A	Exhibit M	Section was added, Customer Notifications and Digital Properties, to include stationery and digital communication requirements	M-1
N/A	Exhibit M	Language was added describing the materials and actions PSE will need to review for outreach made to highly impacted communities and vulnerable populations. PSE will also aid in providing best practices for community outreach.	M-1, M-2
N/A	Exhibit M	Section was added, Cross-cultural and Multilingual Customer Experience, to capture requirement of providing transcreated materials for non-English speaking customers.	M-2
N/A	Exhibit M	Language was added regarding additional customer services terms a contractor will need to comply with:	M-3

		1. Provide customer complaints regarding DER products and services. 2. Indicate how PSE customer interests will be considered when dispatching an event. 3. Provide the ability for customers to opt out of a called event.	
N/A	Exhibit M	Language was removed from Marketing Development and Implementation Plan section and included in a separate section Outbound Calling.	
N/A	Exhibit M	"Brochures" was replaced by "materials" in the PSE Program Marketing and Cross-Promotion section and language was added regarding an option for PSE to approve all Contractor created materials.	M-3
N/A	Exhibit M	Language was added regarding an option for PSE to approve all Contractor created materials.	M-3
N/A	Exhibit M	Language was added to Metrics section to cover all non-English languages, than just Spanish.	M-4
N/A	Exhibit M	Language was added to Website section to include non-English languages that might be pertinent to customer base.	M-5