



*Pacific Gas and  
Electric Company™*

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## **REQUEST FOR INFORMATION**

**# 6131**

PG&E  
Small Medium Business Auto Demand Response  
(SMBADR)  
Demonstration Project

July 27, 2012

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## 1.0 INTRODUCTION

Pacific Gas and Electric Company (PG&E), incorporated in California in 1905, is one of the largest combination natural gas and electric utilities in the United States. Based in San Francisco, the company is a wholly owned subsidiary of PG&E Corporation.

There are approximately 20,000 employees who carry out PG&E's primary business—the transmission and delivery of energy. The company provides natural gas and electric service to approximately 14 million people throughout a 70,000-square-mile service area in northern and central California. Our customers include over 20,000 schools, 3,000 hospitals, 20,000 high-tech companies and 700 military facilities. As the primary natural gas and electric service provider for Central and Northern California, PG&E's service territory stretches from Eureka in the north to Bakersfield in the south, and from the Pacific Ocean in the west to the Sierra Nevada in the east. PG&E provides electricity to over 4.9 million customers and natural gas to over 3.9 million customers.

PG&E is committed to enhancing its supply base to include contractors who can contribute to PG&E's corporate values, including diversity, safety, environmental stewardship, and corporate integrity.

This Request for Information (RFI) is issued to solicit information and conceptual ideas from manufacturers and technology providers (Respondents) capable of supporting PG&E in testing and demonstrating an OpenADR 2.0 2-way communicating thermostat solution for Small Medium Business (SMB) electric customers within its service territory. PG&E categorize customer less than 200kW peak demand in the SMB category.

It is anticipated that this Request for Information will result in information that will enable PG&E to develop a detailed set of requirements for communicating with thermostats in order to identify Suppliers that will best support PG&E's goals for the SMB ADR Demonstration Project (Project). PG&E is interested in OpenADR 2.0 programmable communicating thermostats (PCT) that can provide customers with greater visibility and control over their HVAC energy use for Demand Response and other energy management purposes.

Once the information from this RFI has been received and compiled, PG&E will use it to develop the detailed set of requirements for thermostats that will qualify to participate in the Project. PG&E intends to conduct subsequent periodic reviews of technologies to expand the list of qualified products, so whether or not a manufacturer participates in this particular RFI will have no bearing on their ability to qualify their thermostat in the Project itself. However, PG&E strongly encourages companies wishing to participate in the Project at a later stage to engage in the process in this initial phase.

Please note: This RFI will serve as the main opportunity for Project's team to gather information about technologies, and the team may not be able to meet with Suppliers separately to learn about their technologies.

## 1.1 BACKGROUND

According to current plans approved by the California Public Utilities Commission (CPUC), in the fall of 2012, PG&E will transition SMB customers to Time of Use (TOU) rates and in 2014, critical peak days will be layered over the TOU rates for these SMB customers. Unlike large Commercial & Industrial customers above 200 kW peak demand, this group of SMB customers have not been exposed to time varying pricing and do not have in depth knowledge of how this type of rate schedule will impact their energy costs.

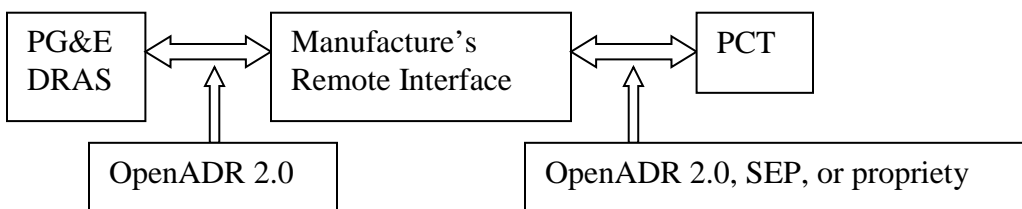
## 1.2 PURPOSE / OBJECTIVES

PG&E perceives a need to develop enabling technology programs to support SMB customers as they transition to time varying rates and intends to provide technologies so that these customers can appreciate additional benefits with the dynamic rate.

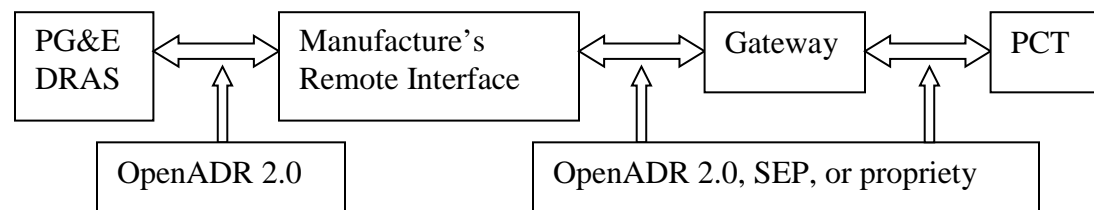
PG&E will implement an Auto DR Demonstration Project to target SMB customers through PCTs that are OpenADR 2.0 certified in order to reduce customer HVAC load.

System architecture on automated DR signal:

Option 1:



Option 2:



## **1.3 RFI PROJECT SCOPE**

The project scope of this RFI entails the following:

- Conduct RFI
- Review submissions and seek clarifications from manufacturers
- Compile a master list of the equipment, features and functions of all submitted technologies and their associated interfaces as described under 6.0, Project Framework/Business and Technical Requirements
- Use the information received to inform the technical requirements for the Project
- Assess the features and functions of submissions
- Develop a list of PCT requirements for the Project implementation

## **2.0 RFI TERMS AND CONDITIONS**

### **2.1. PROPRIETARY AND CONFIDENTIAL INFORMATION**

Proposals submitted in response to this RFI, and all information contained therein, shall become the property of PG&E and will not be returned. The information will be shared by PG&E with its officers, employees, agents and contractors involved in the SMBADR Project.

In addition, PG&E may elect to disclose information provided by Respondents to regulatory agencies including but not limited to the CPUC, the CEC, or other entities that PG&E deemed appropriate. Such disclosure could include responses to discovery by participants in the processes of such agencies or requests for information by such agencies. If PG&E discloses to such regulatory agencies or other interested parties information provided by Respondents deemed by PG&E to be commercially sensitive, PG&E will request that the receiving entity adopt measures to protect such sensitive information from being made available to other parties. However, Respondents should be aware that PG&E will be required to disclose commercially sensitive information as directed by such regulatory agencies, even if those agencies do not adopt any protective measures. Thus, PG&E can make no representation that such information will be kept confidential. Even though Respondent's proposal will become the property of PG&E, Respondent may indicate which portions of its response it recommends that PG&E consider as commercially sensitive information. PG&E will consider Respondent's recommended designations in determining whether to request that regulatory agencies or other requesting parties adopt protective measures. Respondents are urged however to limit the information designated as commercially sensitive to allow PG&E maximum flexibility to discuss Respondent's proposal with other participants in the Project to optimize the design and value of the SMBADR Project.

## 2.2. LIMITATION OF LIABILITY

The issuance of this document and the receipt of information in response to this document will not cause PG&E to incur any liability or obligation to the Respondent, financial or otherwise. PG&E assumes no obligation to reimburse or in any way compensate the Respondent for expenses incurred in connection with the response to this RFI. This RFI is not an offer to contract and PG&E does not guarantee that any work or business will be awarded as a result of the RFI process and the subsequent competitive bidding process contemplated hereby.

PG&E reserves the absolute right in its sole discretion, without liability, to do any or all of the following at any time:

- (a) Amend, supplement or withdraw this RFI;
- (b) Amend, change or discontinue its evaluation or the RFI process described herein;
- (c) Change the volume, scope, or nature of the work described in this RFI;
- (d) Invite other companies to submit proposals after the closing date for the submission of proposals.

## 3.0 RESPONDENT INSTRUCTIONS

### 3.1. QUALIFIED RESPONSE

PG&E is interested in developing a comprehensive master list of equipment, features and functions and as such is aspiring to learn about the environment of available technologies and will not confine this process by adhering to a strict qualification list. Responses to this RFI must be received by the date and time stipulated in section 3.2.

### 3.2. KEY DATES AND ACTIVITIES

Key activities and target dates are set forth below. PG&E may change these dates at its sole discretion.

Event	Format	Date
<b>RFI Release Date</b>	Electronic	7/27/2012
<b>Supplier Questions on RFI due</b>	Electronic	By 8/3/2012
<b>PG&amp;E Response to Supplier Questions Issued</b>	Electronic	8/10/2012
<b>Suppliers' RFI Submissions Due</b>	Electronic	By 2 pm pacific, 8/17/2012

### 3.3. PROCESS OVERVIEW

For Respondent's Proposal to be considered, all information requested must be submitted and the following procedures must be observed:

**Respondent will utilize the Power Advocate website to respond to the RFI.** Respondent's Proposal must be received (i.e., input into the Power Advocate website) no later than **2:00 PM PDT on Friday, 8/17/2012** (hereinafter, "Due Date").

**Proposals received after that time will not be accepted.**

**If Respondent is in doubt as to the intent of any part of the RFI documents, the Respondent shall utilize the Power Advocate website to submit written questions via the "Messaging" Tab. Questions from Suppliers are due no later than 2:00 PM PDT on Friday, 8/3/2012. Questions submitted after this deadline may not be answered.**

PG&E will post answers to questions submitted on the "RFx" Tab in Power Advocate after the question deadline. PG&E's answers to a Respondent's question(s) as well as any additional information referred to by PG&E in a separate document(s) will be available to all Suppliers. PG&E will not be responsible for any other explanations of the RFI documents. PG&E reserves the right to refuse to answer any question, even if it is submitted prior to the above deadline.

The contact name below is the only allowable contact for this RFI:  
Nathan Floyd  
email: [NAF2@pge.com](mailto:NAF2@pge.com)  
415-972-5307

If an identified manufacturer does not intend to provide information, PG&E requests written confirmation.

### 4.0. RFI RESPONSES AND FORMAT

Responses should be organized to follow the format of this RFI and the Respondents are encouraged not to omit any point. RFI responses should be consistent with the RFI's structure, sequencing and nomenclature. Reference materials not prepared for this project, but which the Respondent concludes are relevant and appropriate, should be attached as appendices. This will facilitate

review of the information and support the tight project schedule. To facilitate the comparison and evaluation of information, please follow these guidelines:

Where Respondents are presented with a requirement or are asked to use a specific approach, Respondents should not only state their conformity, but also describe, where appropriate, how they intend to conform. If the technology does not offer that requirement, please respond with N/A.

## **I. COVER LETTER**

Each Respondent will submit, with its information package, a brief cover letter signed by an authorized representative of the organization, certifying the accuracy of the submission and agreeing to be bound by and comply with the terms set forth in this RFI.

## **II. RESPONDENT QUALIFICATIONS**

The following information will offer a brief profile of the manufacturer and its organizational support:

- Provide a brief company history
- Location of headquarters and quantity of additional facilities
- Key contact information
- Staffing profile by business function (i.e., sales, customer support, etc.)
- A listing of key strategic partners with whom the vendor has successfully worked in deployment of the technology

## **III. RFI QUESTIONNAIRE**

Respondents must submit Excel workbook questionnaire electronically via Power Advocate.

### **4.1. REFERENCES / CONTACTS**

PG&E requires that the Respondent produce a list of clients with the names of individuals who can vouch for the quality of the Respondent's service. The Respondent may also include any other information, which they feel would be relevant to PG&E and would distinguish the Respondent's proposal from others.

### **4.2. SUBMISSION INFORMATION**

Following the indicated guidelines and the Excel workbook format, Respondents are encouraged to keep responses brief and concise.

### **4.3. TECHNOLOGY OVERVIEW**



Respondents are requested to provide an Overview (summary) of the technology they offer in three pages or less on how the Respondent and its products/services can meet PG&E's business requirements covering the sections outlined below. What enhancement/upgrade in opportunities exist that may enhance the product? What upgrades may be incorporated into the product in the future? Why is Respondent's product or why are you particularly appropriate for the SMBADR Project?

#### **4.4. PROPOSED SCHEDULE**

Identify any key delivery lead times, dependencies or contingencies, including product or technology development/release schedules, which affect Respondent's ability to deliver its products/services within the following timeframes:

<b>Event</b>	<b>Date</b>
<b>Lab testing for product interoperability</b>	Last quarter of 2012
<b>SMBADR Project launch</b>	First quarter of 2013

#### **5.0. CUSTOMER SUPPORT**

##### ***Customer Solution***

PG&E's primary objective is to ultimately offer SMB customers with a solution that will contribute to their success on time varying rates. Customers in the SMBADR Project will need to be able to make decisions about if and how they want to respond to Project events signals, and other motivations to conserve energy. A subset of these customers will also need tools to execute / automate their responses (the SMBADR Project will target the HVAC system only). Respondents are asked to describe how their solution supports customers' decision-making processes (e.g., provisioning of real-time usage information, peer-group comparisons, weather information, trend analysis), as well as customers' execution of their responses, including automation. Any additional details around usability (e.g., user interface considerations) and accessibility (e.g., language options) are also requested.

#### **5.1. CUSTOMER SUPPORT OPERATIONS**

Because SMB customers traditionally have little time to digest information on programs and technology, PG&E anticipates the need for significant support from a manufacturer from a customer support perspective. Respondents are asked to provide the standard and proposed approach for customer support for their technologies.

## **6.0. ADDITIONAL INFORMATION**

Describe any other capabilities/features of your product/service that may not have been addressed by the business and technical requirements listed in the excel workbook.