

# Request for Proposals: Residential Energy Efficiency Program Management and Program Delivery Contracts

## Questions and Answers

ID	Respondent Questions	Energy Trust of Oregon Responses
<b>Appendices</b>		
1	Appendix G: Are these working or reportable savings?	These are reportable savings.
2	Appendix L: Table 1 indicates that retailers will be responsible for allowing access to the <b>PDC's</b> field staff to place in-store POP, check pricing/placement and host events. However, the main RFP and Appendix H indicate that all field support will be delivered by the <b>PMC</b> . Should respondents include field staff in their pricing under option 2a?	No, field staff should not be included in option 2a. PMCs, not PDCs, are expected to deliver the field staff support for retail midstream promotions. Appendix L details current operations, not future expectations.
3	Appendix H, page 8 "Additional trade ally meetings happen at different times in the year and in smaller communities." Can Energy Trust provide more detail on how many in-person events should be expected annually?	This is at the discretion of the PMC. Energy Trust currently strives to hold at least one event each year in the Klamath Falls, Coos Bay, and Pendleton (or Baker City) areas of the state. Energy Trust also schedules events in the central or north coast region on a less regular basis. Energy Trust is flexible, dependent on the strategies developed.
4	Appendix H, Table 12, page 15 - Please clarify whether the quantities of Outreach activities in each region which are phone calls and which are not phone calls.	Table 12 includes data from non-Energy Trust systems and Energy Trust is unable to disaggregate the actual type of outreach conducted. That said, it is Energy Trust's understanding that New Homes and Products activity represents 100% field/site/in-person visits; the Existing Homes activity includes approximately 50% field/site/in-person visits and 50% phone-based interactions.

<b>Program Delivery Contractor</b>		
<b>5</b>	In the past there has been attributable savings for Refrigerator/Freezer Recycling (Decommissioning), however this is not a current 2017 RES measure. Will Energy Trust expect any savings to be attributed to appliance decommissioning in 2018 or beyond? Can a vendor do anything to prove the viability of this measure to add it to the 2018 RES measure list?	Energy Trust does not expect savings for 2018 or beyond for appliance recycling or similar types of programs.
<b>6</b>	If a PMC or PDC bidder to the New Homes component were to propose improvements to Axis for improved delivery, would that work be funded by the PDC/PMC's budget, or Energy Trust directly?	All Axis fees are paid by Energy Trust. Any PMC and PDC staff time spent supporting improvement projects would be part of the PMC and/or PDC budget.
<b>7</b>	Page 13: "Energy Trust does not administer retail Products program offerings in SW WA... coordinates with BPA SSSS program to cost share and Energy Trust claims gas savings from showerheads purchased a retail locations in the WA service territory." Q: Does Energy Trust anticipate this coordination to continue with BPA? Or does Energy Trust plan to offer a retail product program in SW WA as part of the new program structure?	The industry assumption is that the BPA Simple Steps Program will continue to run Southwest Washington promotions. The current Retail Sales Allocation Tool enables Clark PUD, the primary retail electric utility for the service territory, to claim the majority of savings from these promotions. Any changes would need to be implemented in consultation with Clark PUD.
<b>8</b>	If the application of a mid- or up-stream market channel incentives reduces costs for EPS whole-building new construction, who bears responsibility for delineating savings claims between the two program channels and avoiding double-dip incentives?	Due to the complexity of utilizing modeled whole-home savings, duplicates are subtracted from midstream offers, not from the EPS Whole-Home New Construction offering.
<b>Program Management Contractor</b>		
<b>9</b>	In the pre-solicitation webinar, Marshall Johnson informed the audience that while previous behavioral programs haven't proved to be cost effective in the past, new behavioral measures will be considered in 2019. Why 2019 and not 2018?	The delay for all new measures until 2019 is to allow time to work through Energy Trust's measure development process and establish a savings value for new measures.

<p><b>10</b></p>	<p>Would Energy Trust consider a residential device orchestration pilot that optimizes thermostats, water heaters, and other incentivized / wifi enabled devices for energy efficiency savings for Energy Trust AND load reduction measures on behalf of the utility?</p>	<p>Yes, Energy Trust would consider this. The future PMC will likely need either a validated third-party study to support the basis of developing a cost-effective measure, or the PMC would need to invest in a formal pilot process to qualify savings as cost effective before broadly rolling out such an initiative.</p>
<p><b>11</b></p>	<p>How are utilities involved in this process when determining what programs / initiatives are appropriate for its customers? How is customer satisfaction measured on behalf of the utilities?</p>	<p>Participating utilities maintain ongoing engagement with Energy Trust through the annual budget and action plan development process, bi-monthly utility coordination meetings, and participation in Energy Trust's advisory councils. Customer satisfaction is measured through Energy Trust's Fast Feedback Evaluation surveys of customers, which are conducted at the measure level.</p>
<p><b>12</b></p>	<p>How does the Washington requirement that only licensed plumbers install low-flow devices affect the current composition of kits?</p>	<p>The State of Washington licensure requirement impacts the program's ability to sponsor direct installation of showerheads by PMC staff and/or trade allies. This licensure requirement does not prohibit an individual from installing a showerhead in their home. Energy Trust reduces the savings claimed for self-installed showerheads delivered through kits (as we do in our Oregon measure) to account for the expected rate of installations of products reported through evaluations conducted with prior customers.</p>
<p><b>13</b></p>	<p>Confirm that the Trade Ally Portal is housed via Energy Trust IT resources, with access granted to relevant PMC staff.</p>	<p>Yes, both Insider and trade ally enrollment portals are an Energy Trust IT resource.</p>
<p><b>14</b></p>	<p>Marketing - does the PMC develop point-of-sale materials, such as signage, product tags, etc.</p>	<p>Yes, Energy Trust anticipates that the PMC would develop these materials with some input from the PDC(s).</p>

<p><b>15</b></p>	<p>Please confirm whether Energy Trust or the PMC provides payment to customers.</p>	<p>Currently, Energy Trust prints all incentive checks and the PMC is responsible for mailing those checks to customers. The PMC notifies Energy Trust residential staff when projects meet compliance expectations and are ready to be imported to Energy Trust’s accounting system for check printing. At that point, a final review is conducted by Energy Trust staff to ensure all project elements comply with expected criteria. Energy Trust then prints checks in-house, and the PMC is responsible for picking up the checks and completing the final steps to mail to the recipient.</p>
<p><b>16</b></p>	<p>Can Energy Trust provide demographics for past residential program participants?</p>	<p>Energy Trust recently conducted a preliminary residential customer demographics research project using third-party demographics data. That research produced initial findings about the correlation between income and participation, income and energy use, and education and participation. Please attend the Q&amp;A webinar for a brief explanation of the methodology used and the preliminary results.</p>
<p><b>17</b></p>	<p>Page 20: “Address Washington Innovations in 2018 related to multifamily services” Q: Does program currently serving WA include MF? (Does not indicate so in RFP or Appendix).</p>	<p>No, Energy Trust’s residential program does not currently strategically engage multifamily (MF) properties for participation in the Southwest Washington program. However, multifamily properties served by participating commercial rate codes could potentially participate in a current offering through Energy Trust’s Existing Buildings program, which serves commercial customers in Southwest Washington. Energy Trust is interested in learning whether the inclusion of multifamily measures in residential offerings might increase participation and improve performance of the Southwest Washington portfolio.</p>
<p><b>18</b></p>	<p>The RFP places an emphasis on new measure development, and future thinking for savings claims. Are there limits to which energy end-uses can be leveraged for savings? Specifically; plug loads, appliances, exterior lighting, water-energy nexus reductions, behavioral, and/or renewable generation?</p>	<p>The current limit is determined by the cost-effectiveness test for each measure. If a measure meets the cost-effectiveness test, then it is an option. However, renewable energy measures are not part of the portfolio.</p>

19	Energy Trust requests that contractors interface with their CRM system. Which CRM platform (Salesforce, Microsoft Dynamics, other) is in use?	Energy Trust's CRM is built upon the Microsoft Dynamics platform.
20	How does Energy Trust work with utilities on smart thermostat programs that are DR focused but also provide EE savings for cooling/heating load optimization?	Energy Trust currently works with Portland General Electric on marketing, data exchange, and to leverage complementary offers, such as PGE's incentive, for qualifying smart thermostats. Energy Trust offers a \$50 smart thermostat incentive, which is based on energy efficiency benefits; PGE's incentive of up to \$75 encourages participation in Nest's Rush Hour Rewards program for demand response. Energy Trust's primary engagements are related to promotion of offerings provided by respective organizations (such as PGE and Energy Trust). Energy Trust and PGE maintain ongoing collaboration to explore additional thermostat products and offerings that could result in both energy efficiency and demand response benefits.
21	What will happen with Food Pantry Kits?	Energy Trust anticipates these types of kits will be delivered through service-oriented agencies only through 2017. After 2017, Energy Trust is interested in either limiting delivery of these kits in their current deployment in order to mitigate market saturation of water conservation devices, or to improve the offering with a strategy for better customer engagement and targeting and to create a pathway for kit recipients to participate in additional Energy Trust offerings or connect with other appropriate energy-related service providers who focus on low-income customer groups. PMC respondents may want to consider how kits delivered through social service agencies can bring the greatest long-term benefits from this limited participant interaction.
22	What type of gas and electric savings does Energy Trust project from behavioral initiatives in 2021?	Energy Trust has participated in OPower programs in the past. For 2021, Energy Trust is interested in new automated strategies. This interest was represented in the slides 22 and 23 during the Pre-Solicitation Webinar.

<b>Price Proposal</b>		
<b>23</b>	The RFP requests a total weighted average hourly rate. The pricing template asks for names and rates by task. Does Energy Trust want staff and rate information averaged by task type or should bidders show a row for every position per task?	Energy Trust requests that respondents provide a position description, name (if possible) and rate for each team member per task; showing a row for every position per task. The pricing proposal templates have been updated to reflect this change. Weighted average hourly rates should be reflected in the summary rows only.
<b>24</b>	If respondents wish to provide alternative low/high case scenarios for lighting, should they provide workbook buildups with the alternative scenarios in addition to workbook buildups with the pre-populated scenarios? Or just speak to the alternative scenarios in the narrative?	Respondents should use the existing high/low scenarios and not alternative scenarios. Respondents should not change the savings levels that Energy Trust has provided. Energy Trust does not intend for these scenarios to predict the future, but instead to enable prospective PMCs and PDCs to illustrate how they would operate under changing scenarios. If respondents consider alternative scenarios critical to share, they are welcome to include this as part of the narrative.
<b>25</b>	Does the 2017 administrative costs of \$7.4M include existing PMC and/or PDC contracts?	No, this cost is Energy Trust administration only for the purpose of developing the pricing proposal. Actual administrative costs for 2018 will vary based upon the 2018 Residential Program action plan and will be formalized through the organization's budget process.
<b>Proposal Submittal</b>		
<b>26</b>	Can Energy Trust please clarify the page limits defined in the RFP? Are the page counts based on an individual sheet of paper or does each printed side count as a page?	The page count is based on each printed side of a page. In other words, an individual page printed on both sides would count as two pages.
<b>27</b>	Regarding proposal submittal methods (Section 6.5), please confirm whether Energy Trust prefers removable binding. For example, would other forms of bound submissions (non-spiral) be acceptable or does Energy Trust prefer recycled stock 3-ring binders?	Energy Trust prefers the use of recycled-stock 3-ring binders. In general, Energy Trust encourages respondents to consider the environment when printing and submitting their responses and avoid any unnecessary waste.

<p><b>28</b></p>	<p>If a bidder wants to bid on all parts of this program with one team on their own, is that Option 1 or Option 3?</p>	<p>If a bidder is interested in all residential components either as the sole respondent or in partnership with another company, the bidder would bid on Option 3, which is inclusive of all the options.</p>
<p><b>29</b></p>	<p>Should the current Products program New Manufactured Homes offering be included in Option 2a (Retail Midstream Promotions PDC) or Option 2b (EPS Whole-Home New Construction PDC)?</p>	<p>This would be included under Option 1. Energy Trust anticipates that the future PMC will deliver New Manufactured Homes offerings.</p>