

Energy Trust of Oregon

New Buildings

Request for Proposals

RFP Submission Deadline:
March 27, 2018, 5:00 p.m. (PPT)

Carol Brimhall, Contractor
421 SW Oak St., Suite 300
Portland, OR 97204

503.548.1603
carol.brimhall@energytrust.org



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Introduction

Energy Trust of Oregon, Inc. (Energy Trust) is seeking proposals through this Request for Proposals (RFP) for a Program Management Contactor (PMC) to design, develop, manage and implement a new or enhanced program strategy to specifically focus on and serve the New Buildings market to deliver low-cost energy savings. Respondents are allowed and encouraged to team with other firms to provide a complete package of services.

Energy Trust’s current contract expires December 31, 2018. The current PMC is not prohibited from responding to this RFP. To provide seamless customer service to the businesses served by the program, Energy Trust expects to have a transition agreement in place with the incoming contractor(s) by the beginning of August 2018, and all required contracting complete for full delivery of the New Buildings services by January 1, 2019. The anticipated duration of the PMC contract is three to five years.

Some of Energy Trust’s requirements in this RFP and in any subsequent negotiating or contracting phases are driven by governing law, the provisions of the grant agreement with the Oregon Public Utility Commission (OPUC) and funding agreements with each utility. A copy of the OPUC Grant Agreement is available at www.energytrust.org/about, as well as information about Energy Trust’s background, funding sources, strategic and action plans, policies, and programs.

Key Dates

Intent to respond due	February 23, 2018 5:00 p.m.
Questions and requests for clarification due	March 6, 2018 5:00 p.m.
Proposal submission deadline	March 27, 2018 5:00 p.m.

See [Schedule](#) for additional information. All times listed are Pacific Prevailing Time (PPT).

About Energy Trust

Energy Trust is an independent nonprofit organization overseen by the Oregon Public Utility Commission (OPUC) to help Oregon utility customers save energy and generate renewable power. Energy Trust operates under a [Five-Year 2015-2019 Strategic Plan](#) that sets aggressive savings and generation goals. The plan includes strategies for continuously improving program designs and services, managing the total cost of delivering energy efficiency, expanding customer participation, and replenishing the energy-efficiency resource through a portfolio of new technologies and product development strategies.

Energy Trust’s services, cash incentives and energy solutions have helped participating electric customers of Portland General Electric and Pacific Power and participating gas customers of NW Natural, Cascade Natural Gas and Avista save nearly \$2.7 billion on their energy bills. Since 2002 the organization’s leadership has been a contributing factor in the region’s low energy costs and in building a sustainable energy future.

In 2018, Energy Trust will begin implementation of Diversity, Equity and Inclusion (DEI) goals referred to in the board Diversity, Equity and Inclusion Policy. Additionally, Energy Trust will finalize a DEI Operations Plan with further detail on goals and approach. The successful respondent to this RFP will support achievement of goals relevant to this scope

of work including diverse market engagement and participation in programs and PMC contracting.

II. New Buildings Program

Overview of the current program

New Buildings influences commercial design and construction practices by providing incentives to support high-performance buildings. Outreach managers work closely with building owners and design teams to influence a broad range of market actors, helping customers incorporate energy-efficiency and renewable energy strategies into their projects.

The strategic areas of focus for 2018 are to:

- Influence decisions in early design and early decision-making.
- Accelerate adoption of high-performance and net zero design and construction.
- Develop and deliver pilots, new measures, conduct market research, and evaluations.
- Prepare for advancing codes and standards.

Targeted market and program offerings (emphasis added in **bold** to note the specific program offering) delivered in 2018:

- **Path to Net Zero** supports design and construction that exceeds code by 40 percent.
- Custom solutions using **whole-building energy modeling**, technical assistance, early design assistance, and **standard and custom measures**.
- **Market solutions** are building-type-specific incentives packages.
- On-site renewable energy and **solar system incentives**, support for solar-ready feasibility, design, construction and installation.
- **Early project support, studies and technical assistance** helps designers integrate energy-efficiency and on-site solar and identify energy strategies that support resilience.

Delivery and strategic market transformation¹ activities in 2018 include:

- Outreach and delivery to a wide-ranging market that New Buildings engages with many building/facility types and sizes across both private and public sectors.
- Training and education to targeted audiences of design professionals and building owners.
- Promote results from the 2017 Net Zero Fellowship and additional small project grant opportunities.
- Coordinate with Northwest Energy Efficiency Alliance (NEEA) to leverage regional activities in several key areas: NEEA's enhanced codes pathway, commercial lighting, and planning to support market development of emerging technologies, including advanced HVAC.

¹ Energy Trust uses NEEA's definition of market transformation and currently references Oregon Energy Efficiency Specialty Code as the baseline for New Buildings.

Additional information about Energy Trust’s goals and activities in 2018 can be found in the following:

- [Budget and Action Plan](#)
- [2018 Annual Budget and 2018-2019 Action Plan](#)
- [Market Solutions](#)
- [Commercial > New Construction and Major Renovations > Path to Net Zero](#)
- [Path to Net Zero](#)
- [Conservation Advisory Council Meetings](#)

III. Proposal Guidelines

Introduction

Energy Trust seeks proposals that address near-term energy efficiency goals; develop strategic market transformation initiatives as part of a longer-term strategic market transformation framework; and meet Energy Trust’s Diversity, Equity and Inclusion goals. Throughout the proposal, respondent should demonstrate:

- Understanding of market transformational program strategies;
- Strategic program design development;
- Identification and assessment of opportunities;
- Deployment strategies; and
- Capabilities of the firm and any subcontractors.

Proposals should provide and clearly connect program strategy to Energy Trust’s goals and mission, and provide flexibility to adjust as Energy Trust advances goals and strategies.

Proposal Outline

Responses to this RFP must be submitted in the format described below and must be complete with the respondent’s experience, qualifications and program implementation capabilities to perform all responsibilities of the PMC as described in this RFP. Respondent’s submitted PMC Price Proposal (see **Appendix E**) must clearly detail respondent’s proposed budget to perform all such PMC work.

Submitted proposals to this RFP that do not include all of the following sections and information may be considered ineligible. Page numbers indicated are the recommended maximum; Energy Trust strongly requests that responses not exceed the recommended page limits described.

PROPOSAL FORMAT (Sections should be identified by labeled tabs)

Part 1: Introduction

- A. Cover Page
- B. Table of Contents
- C. Executive Summary

Part 2: Program Design

- A. Market Transformation, Savings Model and Intervention Strategies

- B. Markets and Program Initiatives
- C. Marketing
- D. Program Strategic Action Plan, Goals and Metrics

Part 3: Solar Program Delivery and Management

Part 4: Diversity, Equity and Inclusion

Part 5: Program Delivery Activities

- A. Delivery Model and Implementation Plan
- B. Customer Satisfaction
- C. Ally Engagement
- D. Operations, Procedures and Controls
- E. Measure Development, Pilots, and Engineering and Technical Support
- F. Information Technology

Part 6: Management

- A. Budget Development
- B. Invoicing and Reporting
- C. Forecasting and Market Intelligence
- D. PMC Team Composition and Management

Part 7: PMC Transition Plan

Part 8: Price Proposal

Part 9: Qualifications

- A. Project Team Qualifications and Experience
- B. References
- C. Required Licenses and Certifications

Part 10: Administrative

- A. Conflict of Interest Disclosure
- B. Insurance
- C. Financial Package

Part 1: Introduction

A. Cover Page

For Energy Trust to consider a proposal, the cover page (**Appendix B: Cover Page and Signature**) must be signed by a duly authorized officer or agent of the respondent company submitting the proposal.

B. Table of Contents

Response must include a table of contents. Tabs used to identify sections must be clearly marked.

C. Executive Summary

In no more than two pages, provide an executive summary that:

- Demonstrates respondent's understanding of the RFP objectives and requirements and
- Summarizes why respondent would be the best candidate to deliver the services or products described in this RFP.

Part 2: Program Design

A. Market Transformation, Savings Model and Intervention Strategies (8 pages):

Energy Trust is seeking innovative ways to drive energy efficient outcomes and accelerate market adoption of best practices that will significantly progress the program's goal of market transformation.

Respondent's proposal should address expected changes from energy codes, future energy codes and the timing of market changes; and changes to the program driven by cost-effectiveness, utility avoided cost changes, measure changes, incentive changes, delivery costs, program participation and market penetration. Respondent must provide a strategic market transformation model with proposed strategies that could include:

- Resource acquisition savings strategies and
- Market transformation strategies.

The model should illustrate strategic alignment between resource acquisition and market transformation and identify savings strategies timed to the market for a minimum five-year period. The model should include strategies for the program to drive market changes and anticipate the eventual adoption of new energy codes. Strategies should consider factors such as market conditions, opportunities to impact market adoption and potential for increased innovations. Energy Trust is interested in new ideas that bring about the benefits of energy efficient buildings across Oregon.

To effectively drive market transformation activities, Energy Trust also works with Northwest Energy Efficiency Alliance (NEEA) to support certain market transformation activities across the northwest and in Oregon. The main areas of collaboration between New Buildings and NEEA has been to respond to new and developing state codes and standards including preparing for the upcoming Oregon Energy Efficiency Specialty Code, anticipated to utilize 2018 International Energy Conservation Code (IECC) as the base code; preparing for future codes, and supporting emerging technologies pilots such as lighting and advanced HVAC. This area of collaboration requires PMC to collaborate and provide extensive knowledge of current and emerging energy codes and to estimate potential impacts from changes to program baseline. There is potential to plan for more integrated market transformation work that may involve NEEA in future developments.

A key PMC deliverable will be the development of a market transformation savings model, strategic plans and initiatives that involve planning for changes to codes and standards.

B. Markets and Program Initiatives (10 pages):

Energy Trust serves a broad and active construction market. Energy Trust seeks strategies that serve all markets and regions; plans to enhance the design, delivery and results with specific markets to reach Energy Trust's utility-level energy savings goals, market transformation and DEI goals. Energy Trust seeks proposals that engage a diverse portfolio of customers, allies and organizations over the course of the PMC contract. Proposals must provide ideas for engaging markets, communities and community-based organizations to bring about the benefits of energy-efficiency and enhance program participation. Proposals should demonstrate market knowledge and describe respondent's approach to capture and utilize market insights, monitor market adoption rates and plan for programmatic adjustments to enhance the program.

Building on the strategic market transformation savings model, respondent should:

- Propose a strategic program design and offerings that will result in annual energy savings;
- Provide an assessment that characterizes opportunities and value;
- Describe market strategies and key objectives;
- Propose key areas for innovation;
- Identify tools and resources necessary for influencing decision making; and
- Describe expected outcomes and the market effects of near-term savings and long-term transformation strategies.

Respondent should propose additional strategies that specifically enhance the design and development of the program in the following areas:

- Multifamily housing for affordable-, low- and moderate-income customers;
- Small businesses, developers and building owners;
- Minority- and women-owned and disadvantaged businesses; and
- Locations throughout all of Energy Trust's service territory in Oregon.

A key PMC marketing deliverable will be the development of an initiative plan.

C. Marketing (3 pages):

Energy Trust periodically conducts market research² in addition to program evaluations. Energy Trust has a strong brand in the marketplace and is interested in creative and effective market engagement strategies to address challenges and opportunities across the new construction market. Proposed strategies could include, but are not limited to:

- Increasing measure penetration rates;
- Marketing the value case to decision-makers;
- Addressing market reaction to incentive levels; and
- Communicating beyond highly motivated market actors.

Describe respondent's proposed strategies and activities to implement an effective marketing and outreach plan for reaching audiences identified as key to program success. Additionally, this section must address how respondent would collaborate with other Energy Trust programs and sectors.

A key PMC marketing deliverable is the development and implementation of a detailed annual program marketing and outreach plan. The PMC is also required to deliver high-quality materials consistent with Energy Trust brand guidelines.

D. Program Strategic Action Plan, Goals and Metrics (4 pages):

Provide a three-year strategic deployment plan that addresses and prioritizes actions the PMC will take to position the program for success and achieve key outcomes, energy savings goals and market transformation objectives. Energy Trust has set energy savings goals for 2018 and estimated goals for 2019, provided in Table 1.

Propose attainable energy savings goals for 2019, 2020 and 2021 with consideration for how respondent will quantify savings according to Energy Trust requirements, policies and

² Market Research can be found on Energy Trust's website in the library.

additional factors such as energy codes. Propose additional goals and metrics by region to increase participation.

Propose the potential resources respondent would develop and use to address varied levels of market interests, experience and needs, and how resources will be deployed to target audiences in a way that maximizes program resources. The proposal must specifically outline how respondent’s strategy, approach, and solutions will achieve goals and metrics. Respondent may provide samples as an appendix to the proposal, in addition to recommended page requirements of **Part 2**.

Table 1: New Buildings incentives and reportable savings goals by utility

	2018 incentive total	2018 (kWh or therms)	2019 incentive total	2019 (kWh or therms)
PGE	\$7,805,506	35,485,139	\$7,506,447	40,287,867
Pacific Power	\$3,421,943	19,364,509	\$2,982,115	17,720,806
NW Natural Gas	\$1,143,386	808,780	\$1,297,091	864,342
Cascade Natural Gas	\$139,719	79,795	\$135,549	80,049
Avista	\$63,415	47,465	\$82,607	42,881

Part 3: Solar Program Delivery and Management (5 pages)

Energy Trust’s Solar program supports an active Oregon solar industry with incentives, design assistance, customer outreach and education, business development, and market insights and expertise. To maximize solar potential in new construction projects, the New Buildings program is expected to dedicate program staff to provide solar project development assistance for customers. The PMC will work closely with Energy Trust staff to implement solar ready offerings. The PMC will also be expected to manage a dedicated renewable energy budget for solar ready feasibility studies as well as provide project oversight and incentives that is separate from the energy efficiency budget. Energy Trust’s solar program strategies are already defined and require strategic deployment from the PMC.

Priorities for solar design in new construction include:

- Deliver **early project support, technical assistance and design incentives** to help customers develop near- and long-range plans for on-site solar that effectively integrate solar into building and systems design, and optimize for peak performance.
- Provide **industry outreach and business development** to bridge gaps between solar contractors and the building design community, and reduce the non-equipment soft costs of installing solar.

- Support **advanced solar and storage technologies** that provide additional benefits beyond generation, such as community resilience, utility peak-load mitigation or other grid services.
- Enhance **access to solar and improve solar workforce diversity** through outreach to diverse customers, organizations and communities.

The proposal must specifically outline how respondent's strategy and overall approach to solar project development assistance will address and enhance Energy Trust's 2019 solar priorities for customers of PGE and Pacific Power. Proposal should discuss how these offerings delivered by the PMC will complement and support solar installation incentives managed and delivered internally by the Energy Trust Solar program.

Provide ideas for engaging markets, allies, communities, and community based organizations to bring about the benefits of on-site solar generation and enhance program participation. Propose additional strategies that specifically enhance delivery for:

- Multifamily housing for affordable-, low- and moderate-income;
- Small businesses, developers, and building owners;
- Community resiliency for vulnerable populations;
- Minority- and women-owned and disadvantaged businesses; and
- Locations throughout all of Energy Trust's service territory in Oregon.

Proposals should describe respondent's technical experience related to solar energy, storage or other distributed energy resources. PMC will apply expertise to support projects in meeting Energy Trust design and installation requirements:

- [Solar Ready Commercial Design and Construction Requirements](#)
- [Solar Installation Requirements](#)

The submitted PMC Price Proposal must also include estimated PMC costs and pricing associated with this **Part 3** (see **Appendix E**). The New Buildings program delivered approximately 100 solar feasibility and solar-ready incentives during the past three years. The estimated 2019 solar design incentive budget is \$100,000 divided between PGE and Pacific Power territories.

For more details on the Solar program, please refer to the [2018-2019 Solar Program Action Plan](#), pages 171-174.

Part 4: Diversity, Equity and Inclusion (4 pages)

Energy Trust strives to create a diverse, equitable and inclusive organization with responsive employees and PMCs to achieve energy acquisition goals, serve customers, and engage design and allies and other partners. In 2017, Energy Trust's board of directors adopted a Diversity, Equity and Inclusion Policy, requiring development of a Diversity, Equity and Inclusion Operations Plan. The DEI Operations Plan will be finalized in 2018 and include specific goals and approaches for DEI activities, many which will start in 2018. Energy Trust anticipates further development of its DEI initiative over this contract period and is interested in understanding respondent's experience that Energy Trust can leverage. Energy Trust seeks new ideas through this RFP.

In responding to previous sections of the RFP, respondent is asked to address how they will strategically enhance the program in ways that enable broad and diverse participation and demonstrate capability in the collection of data for our market and participation. Additionally, the proposal should describe respondent's experiences developing and executing diversity, equity and inclusion initiatives and/or policies within its own organization or complying with diversity, equity and inclusion initiatives of other organizations, including, but not limited to, the following:

- Specific activities or projects worked on during the last 36 months demonstrating how respondent promoted diversity, equity and inclusion in its own organization.
- State or federal certifications, awards or recognition for respondent's organizational policies and practices relating to diversity, equity and inclusion.

Part 5: Program Delivery Activities

Review **Appendix D** to further inform this section of your proposal.

A. Delivery Model and Implementation Plan (10 pages):

For this section, at a minimum, the proposal should pull together and address elements identified in **Part 2** of respondent's proposal. It should also include and specifically identify any subcontracted work where applicable.

The PMC is responsible for day-to-day delivery of all program services for New Buildings (see **Appendix D**), maintaining the existing program and proposing program enhancements. Propose a program delivery model that delivers effective services and high value for utility customers and ensures that savings, objectives and long-term goals are met on budget. Describe delivery activities associated with proposed strategies outlined in **Part 2** of respondent's proposal. Respondent's proposal must describe implementation actions and clearly demonstrate ability to effectively implement and manage all aspects of program delivery and continued development of New Buildings. Describe delivery across a minimum of the following:

- Strategy deployment;
- Strategic market development;
- Project delivery;
- Implementation of offers from market entry to exit;
- New developments and pilots;
- Staff deployment and management;
- Detailed tracking, reporting and regular communication;
- Support for program evaluation, research efforts and cross-program coordination;
- Forecast and budget of program initiatives, including incentive management; and
- Estimate of development and implementation timelines.

A key PMC deliverable will be the development of a clear and detailed implementation plan.

B. Customer Satisfaction (2 pages):

Energy Trust places high value on customer experience and the ability of PMCs to communicate opportunities across market sectors. Programs measure and report customer satisfaction each year. Use this section of the proposal to describe respondent's experience with delivering effective programs with high customer satisfaction results. (See **Appendix D**

for more details). Provide a plan that describes respondent's capabilities related to how respondent will:

- Deliver high levels of customer satisfaction;
- Implement changes to the program and offerings;
- Handle customer concerns, feedback and complaints;
- Interact with customers and engage through a variety of methods (including in-person, email and phone) and support outbound communications related to New Buildings program inquiries and transfers to other programs;
- Collaborate and coordinate with other Energy Trust programs and offerings to best meet the needs of customers, including regular meetings and trainings to ensure consistency; and
- Ensure subcontractors are fully engaged, have access to systems and information, and meet Energy Trust customer experience standards.

C. Ally Engagement (3 pages):

Energy Trust New Buildings does not require customers to work with an Energy Trust ally to receive Energy Trust services and incentives. Energy Trust maintains a directory of allies on its website (currently 236 allies) to allow customers to easily find these market actors. In addition to maintaining the ally network, Energy Trust engages with non-allied market actors, both individually and through business/professional associations, especially for specialized services or for targeted market groups. Proposal should include a high-level plan for engaging the market at all levels to reach overall program and organizational goals and include:

- Cultivating strategic and long-term relationships with allied and non-allied market actors, including contractors, distributors, other relevant industry professions;
- Work with Energy Trust to expand participation of allied and non-allied market actors, including minority owned and women owned allies;
- Processing participation agreements and ensuring compliance within New Buildings program;
- Delivering regular communications, training and education, and program updates to trade and program allies, including timely and accurate information regarding promotions, program changes, incentive information, and program and technical specification requirements;
- Providing relevant, timely responses to inquiries and requests from allies;
- Working closely with Energy Trust to manage contractor components of escalated customer complaints;
- Assisting Energy Trust in providing follow up to key New Buildings allies who have not responded to previous communications about expiring insurance and risk termination;
- Providing training and education resources that address varied market needs and ensure all allies are up to date on program requirements; and
- Engaging with vendors who are not approved allies.

PMC will be responsible for delivering an annual ally engagement plan that includes, but is not limited to, outreach strategies for enrolling new allies and ensuring coverage for participants across Energy Trust's service territory and aligns to Energy Trust's diversity, equity and inclusion operational plan goals.

The PMC is responsible for recruitment, improvement, analysis and general management of Energy Trust's allies, trade and program allies, and other groups working with the New Buildings program.

D. Operations, Procedures and Controls (3 pages):

Energy Trust maintains high quality standards, conducts file reviews for compliance, and requires detailed record management and secure data and project information management from its PMCs.

The proposal must address respondent's plan and capabilities for delivery of the current program structure and activities, not limited to the following:

- Providing required project file documentation;
- Ensuring quality and using secure procedures to collect and process personally identifiable information (PII) or sensitive personal information (SPI) such as W-9s, demographic data collection, or other confidential information in compliance with state and federal regulations;
- Ensuring quality and using secure procedures to manage project information, incentive payments and delivery thereof;
- Conducting project reviews and site visits before an incentive payment is prepared by PMC to be authorized by Energy Trust;
- Conducting quality control reviews, including performing quality control of field work, technical and engineering reviews, and site installation verification;
- Maintaining electronic records for all projects in an Energy Trust-approved format, marked with the project ID and including all associated paperwork, invoices, final technical studies and analyses, any simulation modeling files (inputs, models and outputs) and all savings and incentive calculations;
- Developing and maintaining tools such as calculators, forms, checklists, and workbooks (Microsoft Excel, Word and Adobe PDF – that may require custom fields, calculations, formulas, JavaScript or other programming) to process data, deliver incentives, conduct site visits, and verification reviews; and
- Complying with all Energy Trust quality assurance reviews, project file audits and evaluations.

A key PMC deliverable will be detailed protocols and required documentation and project review procedures in a quality control and operations plan for Energy Trust review and approval (see **Appendix D**). The selected PMC will be required to maintain a program implementation manual documenting all procedures, protocols, forms, processes and policies regarding the PMC's delivery, program management, quality control, customer service and compliance. The PMC will be required to deliver regular updates to the implementation manual electronically as changes are made or new processes are launched and not less than quarterly.

Energy Trust's program tracking systems currently includes Customer Relationship Management (CRM) and Project Tracking (PT) to record data. The PMC will be expected to work with Energy Trust to roll out new system developments (see **Appendix C and Appendix D**).

E. Measure Development, Pilots, and Engineering and Technical Support (4 pages):

Energy Trust has a rigorous measure development and approval process to facilitate effective development of measures. In this process, Energy Trust has oversight and approval at various stages of development, including final approval. Energy Trust expects

the PMC to provide technical and engineering expertise to develop new measures and to work closely with Energy Trust program managers and planning staff. Because codes and standards develop rapidly and markets and strategies change, it is critical that the PMC staff are well-versed in the measures that Energy Trust supports. The PMC is required to accommodate and budget for all processes involved in developing, revising and maintaining measures, plus additional pilot budget tracking and reporting. The PMC will lead the following:

- Measure development activities, including developing new measures, updating existing measures, and conducting ongoing research and monitoring for available data that may improve Energy Trust's savings assumptions.
- Pilot development or research, with the goal of assessing new savings opportunities and improving on existing work, which may involve collaboration with strategic stakeholders such as NEEA and additional public reporting.

The PMC's engineering and technical support team will be responsible for maintaining technical protocols and technical guidelines governing project requirements. Propose an approach of technical protocols that include a plan for project-based quality assurance, leveraging the capabilities detailed in **Part 5D**, operations, procedures and controls.

Appendix I: Measures Evaluations Research Governance and Cost Effectiveness details examples of existing technical requirements as well as the measure development process.

The proposal should:

- Demonstrate respondent's qualifications and capacity to review technical measure approval documents, from creating new measure analysis and documentation, tracking and reporting on PMC progress with the development of various measures, and create new additional measures;
- Demonstrate respondent's clear understanding of cost-effectiveness and related regulatory guidelines and rules applicable to Energy Trust throughout Oregon;
- Propose strategies for improving the cost effectiveness of measures, notably the Total Resource Cost (TRC) test, as applied in the state of Oregon;
- Provide the names, title and qualifications of personnel, engineering and technical staff, supporting Energy Trust measure development process; and
- Include a plan for project-based quality assurance, savings realization, and customer satisfaction.

F. Information Technology (2 pages)

All customer information, project and incentive payment requests are recorded and maintained in Energy Trust's CRM and PT systems as the systems of record. Energy Trust will require the selected PMC to either utilize Energy Trust systems directly or utilize respondent's system(s) and securely integrate with Energy Trust's systems. In addition, PMC may be required to coordinate with Energy Trust Solar team on solar project information tracked in the PowerClerk system.

Respondent must propose a plan that clearly identifies which of the two system approaches are to be utilized, and clearly describes the systems and/or integration requirements. Respondent must propose a high-level IT implementation plan that clearly identifies specific implementation requirements, including steps respondent would take, milestones, and milestone dates to ensure successful integration and transition before December 31, 2018, to avoid any disruption in services.

Respondent proposing not to utilize Energy Trust systems directly must also include in the proposal a description of the proposed systems, specific integration needs³ and how respondent will integrate to Energy Trust's systems. Respondent proposing not to utilize Energy Trust systems directly must also include in the IT implementation plan specific work that will be the responsibility of the respondent and specific work that respondent will request of Energy Trust. Respondent must describe the staffing resources available to complete integration work and identify staff.

The PMC must comply with Energy Trust IT requirements outlined in **Appendix C**. All expenses related to the IT implementation plan must be clearly outlined in respondent's Price Proposal.

Part 6: Management (4 pages)

The PMC is responsible for maintaining the existing program, and proposing program enhancements and changes that address new opportunities or overcome barriers. The proposal must address respondent's plan for contract oversight, support and staff management including, but not limited to, budget development, forecasting, invoicing and reporting, market intelligence, and PMC staff.

A. Budget Development

The PMC will be responsible for supporting budget development and savings, and will work with Energy Trust to determine incentive levels for all measures and establish targets for expenditures and savings. Future program budgets will be comprehensive to include all expenditures including incentives, Energy Trust internal management costs and PMC costs. The PMC will use Energy Trust's organizational budget workbooks and action plan development documents.

The proposal for budget development should demonstrate the following capabilities:

- Setting energy savings goals within Energy Trust's cost-effectiveness and levelized cost parameters;
- Managing a comprehensive portfolio-wide budget that achieves annual goals with minimal variance between budget and expenditures;
- Forecasting annual and longer-term energy savings and expenditures and maintaining a budget, including providing tools;
- Developing new savings opportunities; and
- Contract management.

B. Invoicing and Reporting

The PMC's invoicing and reporting requirements and responsibilities are outlined in **Appendix D**. Respondent should:

- Demonstrate adequate staffing and overall business capacity to support accurate and timely invoicing and reporting requirements; and

³ Specific integration needs may include technical specifications and program business needs. Program business needs may include, but are not limited to, the integration and updating of project-level information throughout the project lifecycle.

- Propose an invoicing format that will track management and delivery costs attributed to discrete tasks identified in this RFP.

C. Forecasting and Market Intelligence

The PMC will lead portfolio-wide forecasting activities and monitor the performance of all measures for a single- and multi-year timeline. The PMC will be responsible for tracking and monitoring all savings as recognized in Energy Trust’s systems of record, and synthesizing this information with available data on market conditions and historical trends to monitor progress towards achieving annual goals. Twice annually—customarily toward the end of the second and third quarters—the PMC will provide projected annual performance metrics compared to the targets established in the program’s annual operating budget. The PMC will contextualize the forecast in a formal memo documenting factors contributing to positive or negative variances in performance throughout the portfolio, and will work with Energy Trust to mitigate underperforming areas.

In addition to forecasting for the present year, the PMC will create multi-year projections for key aspects of the portfolio to monitor future available energy resource, trends in cost-effectiveness or other relevant indicators that may assist in characterizing future operating budgets. The PMC will work with Energy Trust to determine appropriate levels of investments to direct toward research and pilot activities that develop future savings opportunities. Respondent should:

- Demonstrate an ability to assess market potential and expected uptake for energy-saving technologies across all market channels;
- Include a proposal for a portfolio-wide dashboard or data visualization tool to provide access to weekly program performance metrics for Energy Trust; and
- Provide an example of how the respondent would identify and mitigate an underperforming metric within the portfolio.

D. PMC Team Composition and Management

The PMC will be responsible for effective management of PMC staff supporting the program and will develop and describe a team structure detailing areas of responsibility for all PMC staff. Energy Trust expects PMC staff to coordinate with other PMC staff on other programs and Energy Trust’s community relations and outreach staff. The PMC’s staffing structure should include clear ownership of key program tasks but should also encourage collaboration and exchange of information both within the PMC team and between Energy Trust and the PMC.

Respondent should:

- Describe the expected management structure within the PMC team, including an outline of the hierarchical distribution of labor and any proposed subcontractors that deliver significant components of the program;
- Include a directory of staff titles, including the expected full-time equivalent (FTE) designation for each title and a brief description of each role’s responsibilities;
- Describe the PMC’s approach to staff development, employee satisfaction and approach to retention;
- Detail the location of each staff member, delineating Portland-based staff and staff located in home, field offices, and those located outside of Energy Trust’s service territory;

- Identify the point(s) of contact between the PMC staff and Energy Trust's program management staff; and
- Experience incorporating diversity, equity and inclusion strategies into program and organizational management.

Part 7: PMC Transition Plan (4 pages)

To allow for a smooth implementation transition, Energy Trust expects a new program implementer to continue the program as-is, with minimal market disruption, for the last quarter of 2018. The proposal must clearly outline a transition plan that would seamlessly facilitate continuation of existing program efforts and momentum with a goal to introduce new strategies in 2019.

Energy Trust anticipates up to a four month overlap the incoming PMC and the existing PMC. During the overlap period, the selected PMC will be responsible for learning and taking over elements of the day-to-day operation of the program.

Transition work typically includes, but is not limited to:

- Participating in orientation sessions;
- Working with Energy Trust and the current PMC to understand the role of the trade and program allies and participate in transfer of strategic program relationships;
- Setting up and testing IT systems and any integrations between the implementer's IT systems and Energy Trust systems;
- Participating in trainings on Energy Trust's program tracking systems, CRM and PT and PowerClerk;
- Setting up phone and email communication channels for customer and ally support, engaging in customer and contractor experience training, revising scripts to meet the needs of the program and establishing a regular call monitoring process;
- Establishing monthly invoicing and reporting templates, and forecasting procedures;
- Updating program collateral, website copy, forms and applications;
- Working with Energy Trust to develop the 2019 scope and budget, including development of a new implementation manual (including management, marketing, communications, delivery, quality control) and formalizing any changes in program process going forward;
- Beginning development of a marketing plan for the upcoming year;
- Beginning program outreach and learning day-to-day operations, by participating in project and lead hand-off activities and meetings with Energy Trust. For example, (i) working with the current PMC on projects to understand and manage all aspects of participant project recruitment and development; (ii) implementing a system for managing active participant projects; (iii) assigning individual outreach staff to work directly with PMC outreach staff to acquire knowledge about projects in pipeline including project contacts, history and status, and making introductions and developing participant relationships;
- Delivering initial revisions to the program implementation manual no later than October 1, 2018; and
- Beginning to assess and review active projects that require continued support and iteration with participant, ensuring personnel are fully informed and prepared to review and close-out Quarter 4 2018 projects.

Energy Trust will require the selected PMC to utilize existing program measures, forms, collateral and procedures during the transition period. Once the selected PMC has demonstrated the ability to manage the current program, additional measures and program changes may be incorporated. During the transition period, only the existing PMC will be accountable to deliver energy savings to Energy Trust.

Part 8: Price Proposal (2 pages, excluding appended items)

See **Appendix E**.

Respondent should submit a price proposal for their services using the template **Appendix E: PMC Price Proposal**. The respondent is required to incorporate four overarching tasks: 1) transition, 2) management, 3) marketing, and 4) delivery. Where subtasks have not been specified, the respondent is encouraged to add relevant subtasks. Any proposal that doesn't include complete information or use the format as directed by Energy Trust may not be considered.

Respondent should assume:

- PMC Task 1: Transition is expected to start August 1, 2018;
- All other tasks will start January 1, 2019, and end December 31, 2020;
- Other direct costs should be priced according to associated subtasks;
- Expenses should be transparent and the total weighted average hourly rate for all staff and subcontractor staff should be easily identifiable; and
- All expenses, including those associated with innovations, should be incorporated into the price proposal.

Part 9: Qualifications (12 pages)

A. Project Team Qualifications and Experience (10 pages)

Describe respondent's experience in successfully developing and implementing comparable energy-efficiency program work and detail how the team's infrastructure supports the achievement of program goals, initiatives and overall success. Include an outline of the organizational relationships of respondent's team (including subcontractors) and a brief description of relevant experience, tenure and geographic locations of respondent's designated lead program manager and key program personnel. Respondent may include resumes of key personnel as appendices. Resumes should highlight experience relevant to this RFP and each resume should not exceed one page in length. Resumes do not count toward the overall page count.

Describe the composition of the team and how the team will manage all aspects of the program.

- Program management (e.g., budgets, reporting, contract management);
- Program administration (e.g., data entry, record keeping, quality and control);
- Market engagement (e.g., account management, customer engagement);
- Market transformation (e.g., delivering long-term strategies);
- Program planning and design (e.g., codes and standards, market transformation, measure development);
- Program delivery (e.g., technical, engineering, codes and standards);
- Program marketing (e.g., collateral, case studies, website);

- Program management of allies or other key program relationships;
- Piloting new initiatives, technologies and approaches;
- Program evaluations and research (engagement with Energy Trust evaluation team for the development of research plans and responding to evaluation findings);
- Customer service (e.g., customer satisfaction);
- Program IT (e.g., desktop support, infrastructure support); and
- Experience incorporating diversity, equity and inclusion strategies into program and organizational management.

If the respondent's team includes subcontractors to develop and/or implement components of the program, discuss the assurance of such support and the experience these parties have in designing, developing and implementing similar programs. Include a letter of commitment to the proposed team by each subcontractor or consultant. (Letters of commitment should be appended and will not be counted in the page limitation for this section.)

If respondent is not currently located in Oregon, include timing and staffing plan to locate an office and personnel with the capabilities to perform the work in Oregon.

B. References (1 page)

Respondent shall identify, in one page or less, any relevant existing programs developed and/or operated by respondent and include a minimum of three references (including name, title, address, telephone and email) for parties knowledgeable about respondent's company generally and also more specifically on the previous program experience of the key participants in the project.

C. Required Licenses and Certifications (1 page)

In no more than one page, disclose whether any of the work described in the submitted proposal requires any type of State of Oregon and/or other state or federal approved license or professional certification and/or any type of third-party license or professional certification. If respondent or any of its team members do not have the required licenses or professional certifications, respondent shall specify plans for obtaining any necessary license and professional certifications, or explain why such licenses or professional certifications are not needed. Potential license or professional certification requirements are not limited to, but may include licenses or certifications from Oregon Construction Contractors Board, Oregon Board of Architect Examiners, Oregon State Board of Examiners for Engineering and Land Surveying, Oregon Building Codes Division, Oregon Department of Education, Department of Consumer and Business Services, or others to be determined.

Part 10: Administration (5 pages, excluding appended items)

A. Conflict of Interest Disclosure (1 page)

In one page or less, respondent must disclose any direct or indirect, actual or potential conflicts of interest respondent or proposed subcontractors may have with Energy Trust. A "direct or indirect conflict" is defined as any situation in which an individual or a member of their family or close business or personal acquaintance, is employed by Energy Trust or the OPUC, or may be reasonably construed to have a direct or indirect personal or financial interest in any business affairs of Energy Trust, whether because of a proposed contract or transaction to which Energy Trust may be a party or may be interested or is under consideration, or whether such conflict is purely conceptual, because of similarity of business interests or affairs. If no such conflict exists, the proposal will explicitly provide

such a statement in the RFP response. Energy Trust has sole discretion to determine whether a conflict of interest exists.

B. Insurance (2 pages)

Please include all insurance information in two pages or less. Energy Trust requires its PMCs to maintain workers compensation insurance, adequate commercial general liability insurance coverage (including contractual liability and products and completed operations coverage), automobile liability insurance, errors and omissions/professional liability insurance, cyber liability insurance, pollution liability/hazardous substances insurance and any other statutory insurance coverage required. The professional liability with errors and omissions coverage needs to specifically cover the professional services performed for the program. Include a complete description of respondent's insurance coverage for performing the program work, including but not limited to:

- Whether such coverage is on a "comprehensive" or "commercial" form;
- Whether such coverage is on a "claims made" or "occurrence" basis;
- All endorsements excluding coverage of any nature, if any;
- All limits, including aggregate limits and the current remaining coverage amounts under those limits; and
- Effective date.

C. Financial Package (2 pages)

Proposals should include a financial statement package that is no more than two pages (excluding appended items) including, at minimum:

- A plan for financing the program, such as sources of working capital and payment plans for subcontractor reimbursement;
- Details of the risk management instruments and strategies that respondent employs for operating programs of this scope;
- A signed copy of the most recently completed full-year financial statement reviewed or audited by an outside independent accounting firm, including balance sheet, income statement and cash flow statement. (Provide a complete copy of the independent auditor or accountant's report, including footnotes, along with contact information and authorization to contact. Also provide a copy of any management letter or recommendations issued by the independent firm, which may be appended);
- A copy of the most recently completed interim or unaudited financials, noted as such (may be appended);
- If the plan for financing the program includes external sources of funds, such as a bank line of credit, provide copies of in-force agreements;
- Three credit references;
- Bank reference information and authorization for Energy Trust or its representatives to contact regarding verification of financial information;
- List Tax Identification Number;
- List of all legal or administrative proceedings pending and concluded for the respondent within the last five years that relate to procurement or performance of any public or private contracts;
- Statement about whether the respondent or predecessors or any principal of the firm has been insolvent or declared bankruptcy within the past five years;
- D-U-N-S® Number from Dun & Bradstreet; and

- Include the same information required by this section for any subcontractors that will play a significant role in program implementation and handling of program funds (if applicable).

IV. Proposal Submittal Process

A. Schedule

Posting of Request for Proposals	February 20, 2018
Intent to Respond and Interest in Teaming due	February 23, 5:00 p.m.
Introduction to Energy Trust informational session	February 26, 2:00-3:50 p.m.
Deadline to submit written questions	March 6, 5:00 p.m.
Posting of responses to submitted questions	March 13, 2018
Proposal Submission Deadline	March 27, 5:00 p.m.
Invitations for interviews issued to finalists	April 16, 2018
Interviews conducted	May 1-3, 2018
Selection and notification to respondents	May 11, 2018
Board meeting to request authorization for contracting with selected respondent	June 6, 2018

B. Intent to Respond and Interest in Teaming

Energy Trust will only accept proposals from parties who have submitted an **Intent to Respond** form (**Appendix A**). This form must be received by Energy Trust no later than 5:00 p.m. (PPT) on the date shown in the **Schedule** above and should be delivered via email to: Carol Brimhall, carol.brimhall@energytrust.org.

This email must include a subject line of "*Intent to Respond – New Buildings PMC RFP.*"

If respondent is interested in teaming on this work and would like Energy Trust to post contact information on the Energy Trust website indicating that interest, respondent must expressly indicate that on the submitted **Intent to Respond** form. Energy Trust will post only those respondents who indicate that they are interested in teaming on the Energy Trust website.

Confirmation of receipt will be sent via reply email within one business day.

C. Questions and Requests for Additional Information

Any questions and/or requests for clarification or additional information regarding this RFP must be submitted via email and received by Energy Trust by 5:00 p.m. (PPT), on the date listed in the **Schedule** above to: Carol Brimhall, carol.brimhall@energytrust.org.

This email must include a subject line of "*Request for Clarification - New Buildings PMC RFP.*" Questions submitted by email and received prior to the stated deadline will be answered on Energy Trust's website by the date shown in the **Schedule** above. Energy Trust staff is not available for verbal conversations with individual respondents and will not respond to additional requests for information after the date listed in the **Schedule**.

Confirmation of receipt will be sent via reply email within one business day.

D. Introduction to Energy Trust

Energy Trust would like to invite all potential respondents to a two-hour informational session on the organization. This session will provide an overview of the origins of Energy Trust, a brief introduction to operations and structure, a presentation on how the organization interacts with PMCs and information on the roles and functions of internal support groups. There will be time for questions and discussion following the presentation. This introduction is an opportunity to engage and learn about how PMCs work with Energy Trust internal support groups, and pose any questions concerning roles and responsibilities of either. The presentation will be conducted via webinar and participation is encouraged. The Introduction to Energy Trust informational session is scheduled for February 26th from 2:00-3:50 p.m. (PPT). **Contact Carol Brimhall** at carol.brimhall@energytrust.org to **register and receive webinar details**. All attendees will be expected to identify themselves. Questions and answers will be recorded and all information will be posted publicly following the meeting.

E. Proposal Submittal/Method of Delivery

Proposals must be presented in a clear, complete and concise manner. Pages must be numbered and sections clearly titled. Energy Trust requests that paper copies of proposals be printed double-sided on recycled paper, and packaged without spiral bindings or other non-recyclable binders/folders.

Respondent is required to submit a total of one (1) original hard copy and seven (7) hard copies, as well as one electronic copy of the complete proposal. One submitted hard copy must contain an original signature on the required **Cover Sheet and Signature Page (Appendix B)**.

Respondent may deliver the proposal to Energy Trust via hand delivery, U.S. Mail or courier service to its agent at the address listed below. Faxed submittals will not be accepted. Electronic copy should be emailed to: Carol Brimhall, carol.brimhall@energytrust.org.

Energy Trust will accept proposals no later than 5:00 p.m. (PPT) on the date shown on the front cover of this RFP. Energy Trust will not be obligated to consider information received outside this time interval for the purposes of this RFP.

Submit proposals to:

Carol Brimhall
Project Manager (contractor)
Energy Trust of Oregon
421 SW Oak St, Suite 300
Portland, OR 97204
carol.brimhall@energytrust.org

Confirmation of receipt will be sent via reply email within one business day.

F. Withdrawal and Modification of Proposals

Respondent may withdraw their proposal and submit a revised proposal prior to the response deadline. After the response deadline, respondent-initiated changes will not be accepted unless Energy Trust, in its sole discretion, makes a determination otherwise. Respondent may withdraw their proposal from consideration at any time.

G. Revisions to RFP

If it becomes necessary to revise any part of this RFP, an addendum will be issued by Energy Trust and provided to all parties that have submitted an **Intent to Respond** form. Respondent should contact Energy Trust if they find any inconsistencies or ambiguities to the RFP. Clarification given by Energy Trust may become an addendum to the RFP.

H. Validity and Deadlines

The submitted proposal(s) must specify the date through which the proposal is valid. At a minimum, proposals must be valid for 180 days from the proposal receipt deadline.

V. Proposal Evaluation Process and Criteria

This section explains how the proposals will be evaluated. It describes the evaluation stages and scoring criteria for proposals submitted in response to this RFP.

A. Proposal Selection Criteria

Proposal selection will be the sole responsibility of Energy Trust. A team of reviewers consisting of Energy Trust staff, and experts from external organizations, will evaluate the proposals. All external reviewers sign confidentiality agreements related to their review. Proposals may be eliminated from consideration at Energy Trust's sole discretion for any reason including, but not limited to:

- The respondent did not return an **Intent to Respond** form;
- The proposal is substantially incomplete or exceeds page limits;
- The proposal is not responsive to the objectives and requirements of this RFP;
- The respondent firm or team has not demonstrated financial stability;
- The proposal is inconsistent with Energy Trust policies or requirements;
- The proposal does not meet financial criteria; or
- Energy Trust determines that a conflict of interest exists.

B. Proposal Evaluation and Notification for Interview

Energy Trust will review the proposals as received and will evaluate each in accordance with the scoring criteria identified in **Section C** below. Interviews may be scheduled with the short-list finalists to discuss proposal questions. Energy Trust will re-score following these interviews and initiate negotiations with the leading respondent(s) whose proposals ranked highest in the evaluation process.

C. Scoring Criteria

The following selection criteria, and any other criteria which Energy Trust deems relevant, will be used to rank and select proposals received. The selection criteria below will be applied to proposals that are not eliminated for the above reasons.

Criteria	Weight	Description
Cost and Energy Savings	40%	<ul style="list-style-type: none"> • Management, Price Proposal and Energy Savings: <ul style="list-style-type: none"> ○ Adequate FTE allocation for support, management and implementation of program. ○ Budget tied to proposal tasks; price proposal elements are specific and measurable. ○ Competitive labor rates and subcontractor costs. ○ Competitive other direct costs.
Strength of Proposal	25%	<ul style="list-style-type: none"> • Design and Delivery: <ul style="list-style-type: none"> ○ Program strategy and design (i.e. strategic planning and program design capability). ○ Effective approach to support long term planning/portfolio management, goals, and metrics. ○ Solar program delivery and management. ○ Demonstrates competency and effective approaches to overall program implementation. ○ Plan for operations and controls including managing quality control of processes for program administration, processing and record keeping. ○ Solutions to provide measure development and technical support. ○ IT integration plan. ○ Previous experience successfully transitioning a program with similar complexity.
Strength and Cohesion of PMC Team	20%	<ul style="list-style-type: none"> • Project Team Qualifications and Experience: <ul style="list-style-type: none"> ○ Program management of budgets, invoicing, etc. ○ Program administration. ○ Market engagement. ○ Market transformation. ○ Program planning and design. ○ Program delivery. ○ Program marketing. ○ Program management of allies or other key program relationships. ○ Piloting new initiatives, technologies and approaches. ○ Program evaluations and research. ○ Customer service. ○ Program IT.
Diversity, Equity and Inclusion	15%	<ul style="list-style-type: none"> • Strength of the proposal: DEI strategy: <ul style="list-style-type: none"> ○ Strategic market transformation framework that creates sustainable market change for our diverse markets. ○ Comprehensive approach to engage a diverse set of customers of various sizes in commercial market sectors throughout Energy Trust territory.

Criteria	Weight	Description
		<ul style="list-style-type: none"> • DEI Deployment Strategy: <ul style="list-style-type: none"> ○ Marketing and outreach plan to broaden participation through targeting filters inclusive of geographic, economic and demographic considerations. ○ Qualifications and experience in collecting market, customer and participant demographic data, and developing baseline and benchmarking data to support reaching a diverse market of customers. ○ Field Services and ally management including a strategy for promoting geographic and demographic diversity within the ally network, training, and education. • DEI Firmographics & Qualifications: <ul style="list-style-type: none"> ○ Demonstrated hiring and contracting practices that support diversity, equity and inclusion objectives outlined in the RFP. ○ Possesses a state or federal certification, awards or recognition regarding diversity, equity and inclusion. ○ Ability to be responsive to Energy Trust DEI goals and objectives, support implementation.

VI. RFP Governing Provisions

All submitted proposals are subject to the following additional provisions:

A. Agreement to All Terms

By submitting a response to this RFP, the respondent represents that it is authorized to submit a response, all information provided in the response is true and correct, and explicitly agrees and accepts the following provisions of this RFP and all other terms and conditions set forth in this RFP.

B. Right to Accept or Reject

Energy Trust reserves the right to make multiple awards, reject any and all proposals and to waive any nonconformity in proposals received, to accept or reject any or all of the items in the proposal, and award the contract in whole or in part as it is deemed in Energy Trust’s best interest. Energy Trust may also choose to negotiate any of the details of proposals prior to contracting.

C. Criminal Record and Credit Check

Respondents selected as finalists to this RFP may be required to consent to a combined criminal record and credit check in order to proceed in the process. Energy Trust will obtain the respondent’s consent to proceed with these checks.

D. Confidentiality

Subject to litigation or other legal disclosure and/or audit requirements, Energy Trust will not disclose information submitted in response to an RFP.

E. Ownership of Responses

All materials submitted in response to this RFP shall become the property of Energy Trust and shall not be returned to the respondent.

F. No Verbal Addendums

No verbal agreement or conversation made or had at any time with any officer, agent or employee of Energy Trust, nor any oral representation by such party shall add to, detract from, affect or modify the terms of the RFP, unless specifically included in a written addendum issued by Energy Trust.

G. Proposal Costs

Each proposal prepared in response to this RFP will be prepared at the sole cost and expense of the respondent and with express understanding that there will be no claims whatsoever for reimbursement from Energy Trust.

H. Waiver of Claims

The respondent waives any right it may have to bring any claim, whether in damages or equity, against Energy Trust, Energy Trust Board of Directors or any of Energy Trust's agents, employees or contractors, with respect to any matter arising out of any process associated with this RFP.

I. Energy Trust Rights Reserved

Energy Trust reserves the right, in its sole discretion, to reject any or all proposals in whole or in part, to waive any minor irregularities or informalities in a proposal, and to enter into any agreement deemed to be in their best interests. In addition to any other enumerated reserved rights and/or options as stated in this RFP, Energy Trust may in its sole discretion do any one or more of the following:

- Determine which proposals are eligible for consideration in response to this RFP.
- Disqualify proposals that do not meet the requirements of the program.
- Negotiate with respondent to amend any proposal.
- Select and negotiate and/or enter into agreements with respondents who are most responsive to the RFP and whose proposals best satisfy the interests of Energy Trust and not necessarily on the basis of price alone, or any other single factor.
- Issue additional subsequent solicitations for proposals, including withdrawing this RFP at any time and/or issuing a new RFP that would supersede and replace this one.
- Vary any timetable or schedule, add or change any provisions discussed herein.
- Conduct any briefing session or further RFP process on any terms and conditions.
- Suspend or modify the RFP process at any time.
- Enter into relationships with more than one respondent.

J. Resulting Contract

Execution of a written contract with Energy Trust will be necessary to perform any of the work described in this RFP or any responding proposals. No award will be considered a commitment, and no obligations or legal relations shall exist between Energy Trust and any selected respondent(s) until a final and binding written contract has been executed by and

between Energy Trust and the respondent(s). Key terms in any resulting contract would include the following: appropriate license and certification requirements; timely and accurate invoicing requirements; requirements stating that written contracts with any of the subcontractors performing any portions of the program are required and must include provisions requiring such subcontractors to adhere to requirements incumbent upon the contractor in its contract with Energy Trust; intellectual property provisions ensuring that work or product developed for the program shall be the property of Energy Trust; conflict of interest disclosure requirements; confidential information nondisclosure requirements; indemnification for third-party claims and limitation of liability provisions, and insurance requirements.

Time is of the essence, and prolonged contract negotiations will not be undertaken. In general, Energy Trust strongly prefers contracts that are consistent with Energy Trust's standard terms and conditions; negotiations for such contracts can generally be completed quickly. Any party involved in these contract discussions can terminate negotiations at any time for any reason. If it appears that contract negotiations are not proceeding in a timely manner, Energy Trust may opt to terminate the discussions and select another respondent.

List of Appendices

[Appendix A – Intent to Respond Form](#)

[Appendix B – Cover Sheet and Signature Page](#)

[Appendix C – IT Requirements](#)

[Appendix D – Roles and Responsibilities](#)

[Appendix E – PMC Price Proposal Template](#)

[Appendix F – Contracting Information](#)

[Appendix G – Future Savings](#)

[Appendix H – Market Data and Information](#)

[Appendix I – Measures Evaluations Research Governance and Cost Effectiveness](#)