

Energy Trust of Oregon
Production Efficiency:
Custom and Strategic
Energy Management
Request for Proposals

RFP Submission Deadline:
April 27, 2018, 5:00 p.m. (PDT)



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1. Introduction

Energy Trust of Oregon, Inc. (Energy Trust) is seeking proposals through this Request for Proposals (RFP) for Program Delivery Contractors (PDC) to deliver Energy Trust’s Custom and Strategic Energy Management (SEM) program offerings for the Production Efficiency program that serve industrial customers.

Proposals should address the new program delivery structure as described in this RFP, which varies from the current structure. Energy Trust seeks responses that create program efficiencies, allow for greater flexibility in designing offerings to serve new and/or lower-participating customers, and deliver cost-effective energy savings to Energy Trust’s industrial customers in Oregon service territories.

Energy Trust’s Custom track is currently delivered through three PDC contracts, all of which will expire on December 31, 2018. Energy Trust also currently contracts directly with SEM contractors to deliver its SEM offerings. Beginning in 2019, Energy Trust intends to deliver both its Custom offerings and SEM offerings under its PDC contracts.

Energy Trust plans to award three PDC contracts, one for each of the three identified territories (see [Appendix A](#)). Respondents are allowed and encouraged to team with other firms to provide a complete package of services.

Respondents may submit a proposal that addresses one or more of the PDC territories; however, no respondent will be awarded more than one PDC territory as the prime contractor. Respondents submitting a proposal as a prime PDC contractor may also act as a subcontractor to other respondents. Respondents should be aware that Energy Trust has a continued interest in expanding awareness and knowledge of SEM throughout Oregon, and is interested in having more than one SEM provider in the program. Energy Trust’s current PDCs, allied technical assistance contractors (ATAC) and SEM contractors may respond to this RFP.

To provide seamless customer service to businesses served by the program, Energy Trust expects to execute a transition agreement with incoming contractors by early September 2018 to complete all required contracting for full delivery of the PDC services by January 1, 2019. The anticipated duration of the PDC contracts is three years, with the option of up to two (2) one-year extensions.

1.1 Key Dates

Intents to respond due	April 3, 2018, 5:00 p.m.
Energy Trust Introduction webinar	April 5, 2018, 10:00 a.m.
Questions and requests for clarification due	April 9, 2018, 5:00 p.m.
Proposal submission deadline	April 27, 2018, 5:00 p.m.
Interviews	May 21 – May 25, 2018

See **Section 5** for additional information. All times listed are Pacific Daylight Time (PDT).

1.2 About Energy Trust

Energy Trust is an independent nonprofit organization selected and overseen by the Oregon Public Utility Commission (OPUC) to help Oregon utility customers save energy and generate renewable power. Energy Trust services, cash incentives and energy solutions have helped participating customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas and Avista save \$2.7 billion on energy bills. Energy Trust's work helps keep energy costs as low as possible, creates jobs and builds a sustainable energy future.

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.

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 OPUC (the OPUC Grant Agreement) 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.

2 Industrial Sector

2.1 Overview of the Current Program Structure

The Industry and Agriculture sector consists of one program, Production Efficiency (program). Production Efficiency provides electric and gas energy-efficiency solutions to all sizes and types of eligible businesses in the industrial, agriculture, wastewater and water treatment sectors. The Production Efficiency Program is designed and managed internally by Energy Trust staff, and delivered to the market by contractors and other market actors. Energy Trust currently performs all processing of program applications and data entry into Energy Trust's customer and project tracking systems.

The program offers comprehensive services and incentives to help eligible industrial businesses achieve cost-effective savings on an ongoing basis. The program's project volume has more than doubled over the past five years. In 2017, Production Efficiency completed nearly 1,500 projects that delivered almost 17.1 average megawatts (aMW) of electricity and more than 1.3 million therms (MMTh) of natural gas savings, and provided over \$20 million in customer and service incentives. In 2018, staff expects Production Efficiency to deliver 34 percent of Energy Trust overall electric savings and 15 percent of overall natural gas savings, 19.3 aMW and 1.06 MMTh, respectively¹.

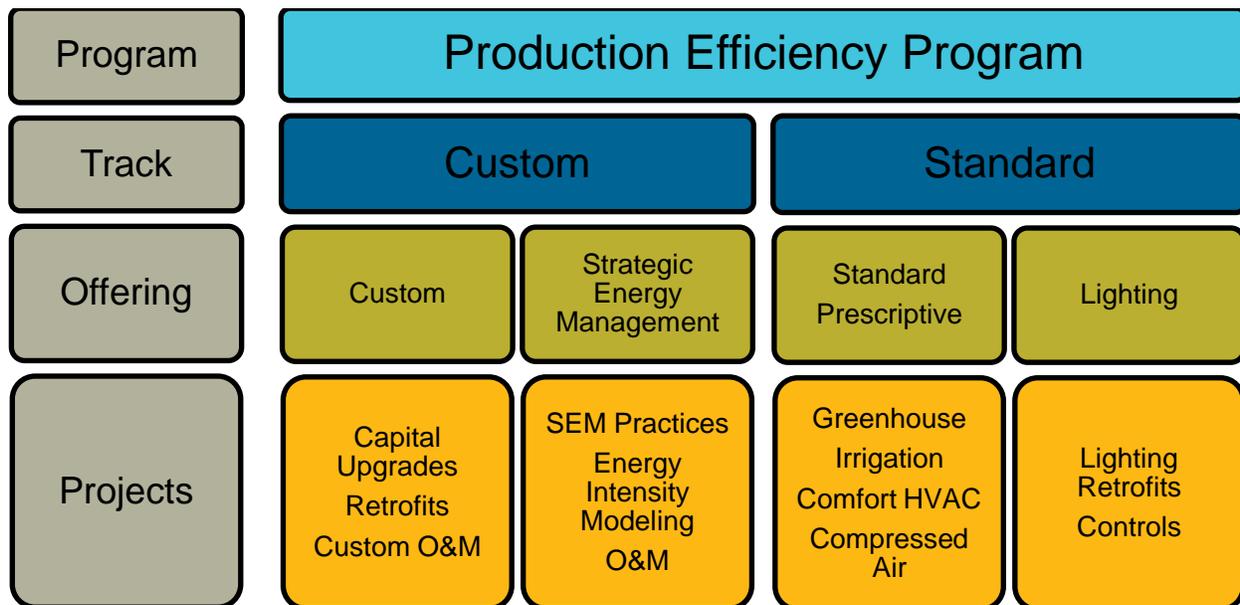
Production Efficiency delivers offerings and achieves savings through two primary tracks: the Custom track and Standard track (see figure 1). This RFP addresses program delivery services for the Custom track, which includes Custom and SEM. Custom and SEM offerings currently

¹ Further information regarding Program trends can be found in [Appendix G](#) and [Appendix H](#).

generate just over 50 percent of electric savings and 70 percent of gas savings for the Production Efficiency program, at about 55 percent of the total program cost.

In 2018, Energy Trust customer and service incentives for the Custom and SEM offerings are budgeted at approximately \$11.2 million to save an expected 8.2 aMW of electricity and more than 740,000 therms of natural gas.

Figure 1: Overview of Current Production Efficiency Program



2.2 Current Custom Track Roles and Responsibilities

To deliver the program’s energy efficiency services and incentives, Energy Trust currently utilizes a combination of contractors with specific responsibilities. This includes PDCs, ATAC, and SEM providers (contractors who deliver all SEM services). PDC representatives act as primary account managers for industrial sites located in their territory (see [Appendix A](#)) and draw on their own professional expertise to bring relevant program offerings to customers and engage them in the program. This includes providing program participants with referrals, access and assistance to other beneficial program offerings, such as the Standard track offerings (managed by the Standard track PDCs), Custom track custom projects, SEM, and technical services, as well Energy Trust’s renewable energy program services and incentives.

Table 1: Custom Track Roles and Responsibilities Overview

Offerings	Offering Summary	Delivery Method
<p>Custom Capital and Custom Operations and Maintenance</p>	<p>Custom project measures include capital upgrades, replacements, retrofits, and custom operations and maintenance (O&M) improvements. Custom projects are typically enrolled and completed within 6-8 months, but may complete in as little as two months.</p> <p>Custom project measures require a technical study, completed most often by an ATAC with specific experience with the customer’s industry and/or energy system for the project. Energy Trust provides service incentive funding towards the cost of these technical studies completed at program participant sites.</p> <p>Savings for Custom capital and O&M projects are calculated in the technical study and verified after installation. This is prior to the payment of the program incentive.</p>	<p>Custom PDC program representatives are typically client relationship managers with energy experience. They function as account managers and help customers identify and verify projects, and facilitate program participation with a priority on excellent customer-service to serve a diverse range of customers.</p> <p>The PDC representative provides the energy engineer/analyst with the scope of the potential Custom project measures. The ATAC energy engineer/analyst completes data collection, calculates the savings, and writes up the technical report. Then the PDC account manager works with Energy Trust staff to approve the project for an incentive. Energy Trust staff is responsible for reviewing and approving the technical study before it is provided to the customer, for processing projects in its systems and paying incentives.</p>

Offerings	Offering Summary	Delivery Method
Strategic Energy Management (SEM)	<p>Energy Trust introduced SEM in 2009 to help industrial facilities of all types and sizes implement a holistic approach to energy management. Through SEM, manufacturers can reduce energy use immediately and establish a strong foundation for future continuous energy improvement.</p> <p>SEM offers participants two options: First Year SEM is typically delivered in a cohort of different businesses in various locations. Continuous SEM is currently delivered to individual sites who have completed a First Year SEM engagement, and is available for sites that want to expand their practice of SEM in their facility on a longer-term basis.</p> <p>Energy Trust has its own proprietary curriculum for SEM that the SEM provider delivers, all of which is detailed in Energy Trust’s guide for SEM Coaches.</p> <p>All SEM engagements are 12-14 months long; savings are calculated and claimed at the end of the engagement.</p>	<p>The PDC account manager holds the primary relationship with SEM participants and is responsible for recruiting SEM participants and assisting with enrollment and kick-off activities.</p> <p>The SEM provider delivers all participant-facing SEM activities including workshop delivery, one-on-one communications and regular site visits, as detailed in Energy Trust’s guidelines for SEM coaches. The provider informs Energy Trust of participant progress and any issues that arise during the engagement.</p> <p>The SEM provider also develops energy intensity models in accordance with the Energy Intensity Modeling Guidelines and prepares the annual savings reports.</p>

2.3 New Program Delivery and Contracting Structure

As the program matures, Energy Trust is observing market trends that challenge the current program design and delivery. Large sites, consuming greater than 1 aMW per year, have been the largest source of Custom and SEM savings, and historically these customers have had high participation. To maintain saving levels, Production Efficiency will need to expand participation and also control delivery, operations and administrative costs to maintain cost-effectiveness. The program seeks to expand participation with small- and medium-sized industrial energy users, rural customers and customers that have not participated with the program before.

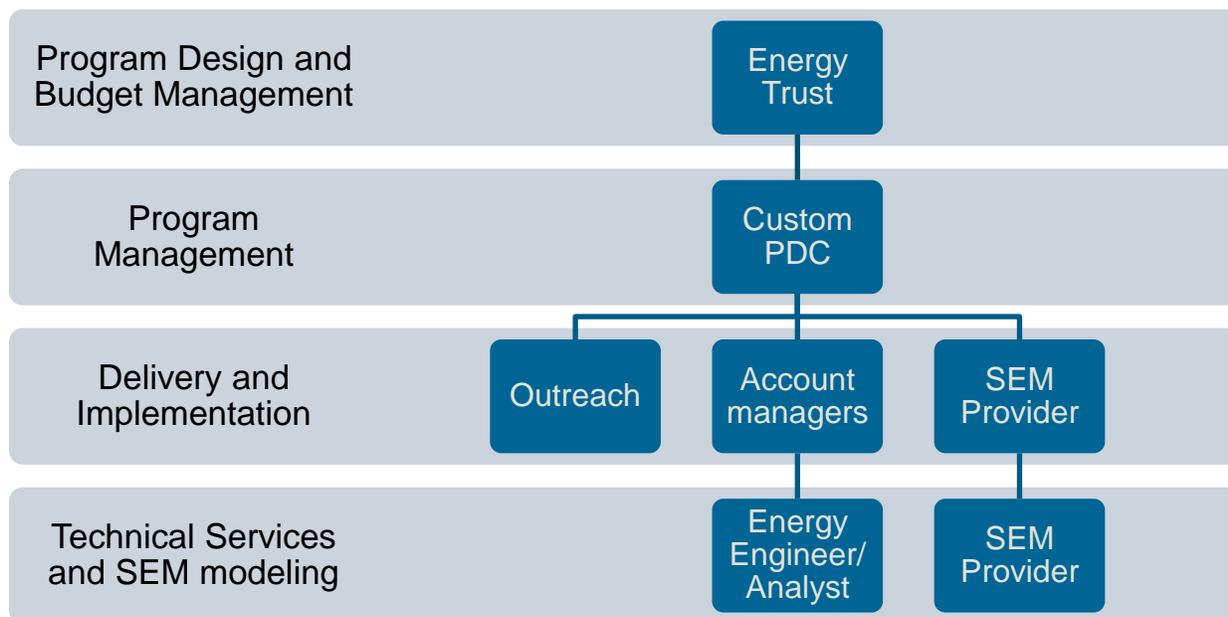
To meet the market’s needs, Energy Trust intends to, with this RFP, restructure the program to combine the delivery of Custom and SEM into the selected Custom PDC’s scope of work for each territory. These Custom PDC’s will now be responsible for delivery of Custom capital and O&M offerings, including the completion of Energy Trust approved technical analysis studies for program participants, and for the delivery of SEM, including the development of Energy Trust approved energy intensity models for program participants. See figure 2 below and [Appendix E](#) for further information regarding roles and responsibilities. See [Appendix I](#) for additional information about Energy Trust’s annual budgeting and contracting processes.

Through this re-design, Energy Trust expects to:

- Achieve delivery and operational efficiencies to maintain cost-effective savings
- Gain greater flexibility to respond to market opportunities
- Engage and maintain more participation from underserved businesses, which includes: small- to medium-sized, minority- and women-owned businesses located in rural or low-to moderate-income areas.
- Reduce the number of contractors serving individual sites to streamline customer touch points, communications and enhance customer experience.

Respondents should consider these key drivers for change in their proposals.

Figure 2: New Program Design Structure



3 Overview of RFP structure

Energy Trust expects that one PDC can deliver the Custom and SEM offerings more efficiently than separate contractors.

Intent to Respond

The respondent **must** submit an Intent to Respond for their proposal to be considered. Within that Intent to Respond, respondents must identify for which territories their firm intends to submit a proposal. If the respondent is interested in teaming opportunities, Energy Trust will post those respondents Intents to Respond on the website after the intent to respond deadline passes.

Territory Selection

Territory 1

Territory 2

Territory 3

4 Proposal Outline and Instructions

Respondents are required to use the following formatting structure in their proposals. **Section 4** describes the specific tasks and subtasks the respondent should address.

Hard copy submissions must include labeled tabs for each section. Page numbers must be on each page and noted in the Table of Contents.

Table 2: Response Proposal Format

1. Introduction (5 pages) A. Cover Page (1 page) B. Table of Contents (2 pages) C. Executive Summary (2 pages)
2. Task 1. Transition (3 pages)
3. Task 2. Custom Track (15 pages) A. Customer Engagement B. Delivery C. Engineering, Project Analysis and Technical Support
4. Task 3. Strategic Energy Management (8 pages) A. Delivery B. Engineering, Project Analysis and Technical Support
5. Task 4. Program Management (5 pages) A. Budget Management and Forecasting B. Project Processing C. Information Technology

6. Task 5. Program Enhancements (5 pages)
8. Diversity, Equity and Inclusion (2 pages)
9. Price Proposal (4 pages)
10. Qualifications (6 pages) A. Project Team Qualifications and Experience B. References C. Required Licenses and Certifications
11. Administrative (5 pages) A. Conflict of Interest Disclosure B. Insurance C. Financial Package

4.1 Introduction

Cover Page (1 page)

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

Table of Contents (2 pages)

Proposals must include a table of contents. Tabs used to identify sections must be clearly marked in hard copy versions.

Executive Summary (2 pages)

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

- Demonstrates respondent's understanding of the RFP objectives and requirements;
- Summarizes why respondent would be the best candidate to deliver the services described in this RFP; and
- Summarizes respondent's understanding, approach and experience regarding diversity, equity and inclusion.

4.2 Task 1: Transition (3 pages)

To allow for a smooth implementation transition, Energy Trust anticipates up to a four month overlap in 2018 wherein the incoming PDC team will work with the existing PDCs and SEM contractors. In this section, describe the respondent's strategy and approach for transitioning to the new program design structure (figure 2). Beginning January 1, 2019, the selected PDCs will be responsible for taking on all PDC day-to-day operations and operational activities. Energy Trust expects the selected PDCs to lead this transition with minimal change or disruption to customers, trade allies or other key program partners. During the transition period, only the existing PDCs will be accountable for delivering 2018 energy savings to Energy Trust.

Respondent must develop an operational plan that addresses how they will manage transition work and includes, but is not limited to:

- Participation in program orientation sessions and Energy Trust orientation trainings;
- Work with Energy Trust and the current PDCs and SEM contractors to transition strategic program relationships;
- Participation in trainings on Energy Trust's Customer Relationship Management (CRM) and Project Tracker (PT) systems;
- Transition of participants currently enrolled in Continuous SEM and delivery of the First Year SEM cohort(s) planned to begin fall 2018 (further detail in [Section 4.4](#));
- Transition of projects with existing technical analysis work orders started in 2018, forecasted to close in 2019;
- Establishment of monthly invoicing, reporting templates and forecasting procedures;
- Feedback to Energy Trust marketing staff on any immediate opportunities to update marketing and/or website content;
- Work with Energy Trust to develop the 2019 contract scope of work and budget; and
- Transition staffing plan to ensure adequate ramp-up time and training for staff.

Include respondent's proposed budget to the 2018 transition work in the pricing proposal ([Appendix D](#)).

4.3 Task 2: Custom Track (15 pages)

Customer Engagement

Energy Trust places a high value on the experience of customers seeking information about, and participating in, our programs. Production Efficiency has historically high customer satisfaction. PDC representatives perform the role of account manager for all customers and develop strong working relationships to help them access all applicable Energy Trust services. PDCs also provide technical energy expertise that helps customers reduce energy consumption at their sites.

Respondents must describe their approach for a cohesive and streamlined customer experience to help customers navigate through and select from appropriate Energy Trust offerings. This approach should be tailored to the territory or territories for which the respondent is bidding and include activities ranging from initial contact, project identification and project completion. The proposal should identify how the respondent intends to reach new participants or customers that have not been involved with the program on an ongoing basis.

The plan must address how the respondent plans to meet Energy Trust expectations and program goals in the following areas:

- Describe the engagement strategies to reach customers for the specific territory or territories;
- Explain how the respondent would meet Energy Trust's expectations for customer service and maintain high customer satisfaction, as measured through Energy Trust's evaluation process;

- Describe outreach strategies to broaden participation to underserved and diverse customers, including but not limited to small- to medium-sized businesses, rural customers, minority- and women-owned businesses, businesses located in rural or low- to moderate-income areas and industries with low historic participation;
- Illustrate how to collect, utilize and analyze data resources available from Energy Trust, or potentially third-party services, to develop greater market characterization and targeted outreach, including data that can support Energy Trust tracking towards its diversity goals;
- Provide a customer recruitment strategy for SEM addressing specific opportunities and challenges for each territory the respondent is bidding on, including new customers for First Year SEM and existing participants for Continuous SEM;
- Explain how the respondent will provide input to Energy Trust’s marketing team on marketing needs, and provide subject matter expertise to review marketing materials for technical accuracy;
- Discuss how the respondent would share local market intelligence with Energy Trust’s program and marketing managers to help inform program design and marketing decisions, information will be captured in Energy Trust’s CRM system;
- Describe the diverse network of stakeholders and market actors that the respondent would collaborate with in delivering this program, including both statewide and local stakeholders in a given territory;
- Provide examples of how the respondent has been successful in communicating the business case for energy efficiency to customers;
- Describe how you will collaborate and coordinate with Energy Trust’s Standard track PDCs, trade allies, and other Energy Trust Programs such as Existing Buildings, New Buildings and Renewable Energy program teams to best meet the needs of customers; and
- Describe how the respondent will assist Energy Trust communications and customer service staff and program managers in resolving customer concerns and escalated complaints.

Delivery

PDCs assist customers implementing qualifying cost-effective Custom projects to help them apply for and receive Energy Trust incentives. The PDC is responsible for energy savings achievements that meet custom savings objectives and goals (see **Section 4.8**). Proposal should demonstrate the respondent’s ability to manage delivery of Custom projects.

Describe how the respondent will deliver on program goals for bringing in deeper savings at more mature, large sites with a long history of working with Energy Trust. In addition, include methods to reach and serve small- to medium-sized business that are either new to Energy Trust or less engaged with the program.

Specifically address the following:

- Provide an overview of the structure of the delivery team and strategies to engage customers for Custom projects within the specified region;

- Identify the barriers and challenges related to program implementation in each respective territory identified in your proposal, and how respondent will overcome them; and
- Address how the respondent will achieve deeper savings at more mature sites in the specified territory.

Engineering, Project Analysis and Technical Support

PDCs will be responsible for supporting a project through the entire project life cycle—identifying and scoping an opportunity, completing a technical analysis study (TAS), explaining the value of the potential energy efficiency measures and prioritizing them for implementation, and performing verification and developing a final verification report upon project completion. Energy Trust has a template for the TAS report available in [Appendix M](#).

The respondent must demonstrate the ability to perform energy engineering, project analysis and technical support, including but not limited to the following:

- Describe how the respondent team will complete project scoping at a customer’s site to identify cost-effective energy savings opportunities;
- Describe how the respondent team will ensure quality control on energy savings for project measures through the life cycle, including pre-installation site visits, technical analysis study development and review, and post-installation verifications to confirm that equipment has been installed and is operating according to design specifications;
- Illustrate how the respondent would apply Energy Trust’s [cost-effectiveness criteria](#) (including utility and total resource cost test and regulatory framework) on for each efficiency measure in the Custom track, including the scoping phase and TAS phase; and
- Identify new savings opportunities through new or emerging technologies for the Production Efficiency program.

4.4 Task 3: Strategic Energy Management (8 pages)

Delivery

The PDC will be responsible for delivering First Year SEM and Continuous SEM through two discrete roles—PDC account manager and SEM provider. SEM providers will be responsible for delivering all SEM services to participants.

As noted in [Section 4.3](#), the PDC account manager is the primary point of contact for customers. PDC account managers are responsible for recruiting SEM participants, and for assisting with the enrollment and kick-off process. The account manager participates in project identification efforts (treasure hunts), serves as a supporting technical resource to the customer throughout the SEM engagement and provides reviews of any energy intensity models and reports completed during a customer’s SEM engagement.

The SEM provider delivers all participant-facing SEM activities including cohort workshops, one-on-one communications with energy teams from each participant and regular site visits throughout the SEM engagement. The SEM provider shares technical knowledge with

participants, develops energy intensity models in accordance with Energy Trust's Energy Intensity Modeling Guideline and prepares the annual savings reports for SEM sites. The SEM provider informs the PDC account manager and Energy Trust of participant progress and any issues that arise during the engagement. For further background on SEM, see [Appendix L](#).

In 2019, Energy Trust expects to launch one First Year SEM cohort in both Territory 1 and Territory 2, with the possibility of a smaller cohort in Territory 3 and/or individual customer engagements in locations where a cohort is not possible. Energy Trust also expects to enroll 10-20 participants across territories for Continuous SEM.

SEM participants interested in furthering the adoption of SEM practices at their site(s) may elect to continue with Continuous SEM, which is currently delivered to individual sites. Energy Trust has received feedback that a cohort approach to Continuous SEM may help motivate customers to take action. Energy Trust is interested in ways to integrate cohort elements into the Continuous SEM offering.

The proposal must address the following:

- Provide an overview of the structure of respondent's SEM team for delivery of First Year SEM and Continuous SEM engagements over the next three years by specific territory;
- Detail how the respondent will use the SEM curriculum, tools and materials developed and owned by Energy Trust to deliver SEM guidance, training and technical support to help participants identify and achieve verifiable energy savings;
- Describe the strategies the respondent's team will employ to influence customer behavior and company culture, both for participants experiencing SEM for the first time and for those enrolled in multiple-year engagements, including common barriers encountered at sites and how your team addresses these barriers;
- Illustrate what elements of a Continuous SEM engagement are well-suited for cohort-based activities and what elements would be more successfully delivered in one-on-one engagements with customers; incorporate these Continuous SEM cohort activities within your SEM pricing proposal; and
- Provide recommendations on how Energy Trust could achieve deeper SEM savings in a maturing market.

Engineering, Project Analysis and Technical Support

During First Year SEM, the SEM provider is required to develop an energy intensity model for each participant site that is used to calculate energy savings during the engagement and provide performance feedback to the participant. SEM providers use the Energy Intensity Modeling Guideline to align their modeling process with Energy Trust requirements and best practices. The Energy Intensity Modeling Guideline is intended for use with both First Year SEM and Continuous SEM offerings.

In Continuous SEM, the SEM provider further refines the model developed in First Year SEM, or may make more significant modeling changes, as necessary. The SEM provider will be

responsible for developing the model, training the participant on how to use the model, and regularly updating the model with production and energy data.

In the proposal, the respondent should:

- Illustrate the technical approach to energy intensity modeling within the industrial sector utilizing Energy Trust’s Energy Intensity Modeling Guidelines, including the types of modeling software used;
- Describe how the SEM provider will share feedback to participants utilizing the model; and
- Identify approaches the respondent team will use to identify and analyze gas-saving project opportunities.

4.5 Task 4: Program Management (5 pages)

PDCs will be responsible for managing the operational aspects of delivering and implementing the program within their assigned territory ([Appendix A](#)). The proposal must address the respondent’s plan to accurately perform the functions of invoicing, reporting, budget management, forecasting, project processing and adhering to Energy Trust information technology requirements. The PDC will be required to use or integrate with Energy Trust’s systems of record (see [Appendix J](#)) and meet all information technology requirements for data confidentiality and security. PDCs will also manage documentation of all procedures, protocols, forms, processes and policies regarding the PDC’s delivery, implementation, quality control, customer service and compliance activities.

The PDC will be responsible for tracking and monitoring all savings as recognized in Energy Trust’s systems of record. The PDC will also need to synthesize this information and forecast year-end performance to goal. Twice annually—at the end of the second and third quarters—the PDC will provide projected annual performance metrics compared to the targets established in the program’s annual operating budget. The PDC will contextualize the forecast in a formal report documenting factors contributing to positive or negative variances in performance, and will work with Energy Trust to mitigate underperforming areas.

Budget Management and Forecasting

Proposals should address respondent’s plan to perform budget management and forecasting activities in its assigned territory, including

- Track savings, delivery costs, and customer and service incentives to goal and budget; and
- Use market intelligence, project pipeline data, and past experience to forecast year-end savings and potential shortages and overages on savings and budget.

Project Processing

The PDCs will be responsible for tracking, documenting and processing projects directly within Energy Trust’s systems of record or utilize respondent’s system(s) and integrate with Energy Trust’s systems of record (see [Appendix E](#) for additional details).

Describe respondent's plan and capabilities to perform the operational tasks outlined in [Appendix E](#), including:

- Create electronic project files;
- Verify participant's eligibility (including determining self-direction eligibility)
- Verify that the incentive application, custom calculator and forms meet program requirements and that required project paperwork is present, complete, legible and accurate;
- Review all project documentation (invoices, spec sheets, etc.) for completeness;
- Ensure accurate data entry of customer information, incentive form information and payment details;
- Process payments according to Energy Trust requirements;
- Ensure all active projects in Energy Trust's program tracking systems are up to date;
- Comply with all Energy Trust's quality assurance reviews, audits and evaluations, whether the work is performed by Energy Trust or by Energy Trust trade ally contractors; and
- Develop and implement quality control plan for project processing.

Information Technology

All customer information, projects and incentive payment requests are recorded and maintained in Energy Trust's Customer Relationship Management system (CRM) and Project Tracker (PT) system as the systems of record. Energy Trust will require the selected PDC to either utilize Energy Trust systems directly or utilize respondent's system(s) and utilizing Energy Trust web services.

If the respondent chooses to integrate its own IT system, the respondent must address the following in its proposal and ensure that it adheres to the IT requirements specified in [Appendix J](#).

Proposals should:

- Describe how the respondent will set up and test integrations between the respondent's IT systems and Energy Trust systems;
- Elaborate on the technical team available to implement and support the system integration; and
- Describe the security protocols that will be implemented to protect all confidential information.

Proposals should clearly outline any software licensing fees and all expenses related to the IT integration in the pricing proposal.

4.6 Task 5: Program Enhancements (5 pages)

Energy Trust encourages respondents to explore potential program enhancements that will continue to maintain Energy Trust's position as a leader in custom industrial efficiency. Significant changes to current program offerings should demonstrate benefits to Energy Trust

by reducing costs, increasing savings, broadening participation and/or addressing market challenges.

Proposals may expand on or offer alternatives to current program activities included in this RFP as well as address some of the bullets below. Respondents should include pricing for program enhancements activities as pricing options within the [Appendix D: Price Proposal](#) template.

- Describe how the respondent would streamline implementation of offerings to gain efficiencies within the Custom and SEM offerings, including approaches for small- to medium-sized customers; and
- Describe how the respondent would develop an overview of a lighter-touch SEM offering that would meet the market needs in the proposed territory, including key customer activities, deliverables and modeling approach.

4.7 Diversity, Equity and Inclusion (2 pages)

Energy Trust strives to create a diverse, equitable and inclusive organization to achieve energy acquisition goals, serve customers, and engage design and trade 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 Diversity, Equity and Inclusion Operations Plan will be finalized in 2018 and will include specific goals and approaches for diversity, equity and inclusion activities, many of which will start in 2018. Energy Trust anticipates further development of its diversity, equity and inclusion 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.

To meet diversity, equity and inclusion goals for Production Efficiency, Energy Trust is seeking strategic delivery approaches to enable broad and diverse participation with underserved businesses including small- to medium-sized businesses, minority and women-owned businesses and businesses located in rural or low- to moderate-income areas. Energy Trust is also seeking to strengthen data collection to track the performance toward diversity goals (see [Section 4.3](#)).

For [Section 4.7](#), respondent should describe its experience developing and executing diversity, equity and inclusion initiatives and/or policies in its team 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 that demonstrate how respondent promoted diversity, equity and inclusion in its own organization or through the work of subcontractors in the areas of recruitment, hiring, retention and promotion; training and professional development; and programs;
- State or federal certifications, awards or recognition for respondent's organizational policies and practices relating to diversity, equity and inclusion;
- Details on specific activities or strategies respondents implemented that build a business case for expanding participation to underserved customers to achieve higher energy savings;

- Specific activities or strategies to increase the participation of small- to medium-sized, rural, and minority and women-owned businesses;
- Specific activities or strategies respondents implemented to expand their professional networks with small- to medium-sized, rural, and minority- and women-owned business customers; and
- Specific examples of how respondents collected, analyzed and reported disaggregated demographic and firmographic data to increase awareness, understanding and participation of small- to medium-sized, rural, and minority- and women-owned business customers.

4.8 Price Proposal (4 pages)

Respondent must submit a price proposal for its services using the template [Appendix D: PDC Price Proposal](#). The respondent is required to complete 1) Summary, 2) Staffing Summary, 3) Study and SEM Counts, and 4) Price Delivery by Territory. Where subtasks have not been specified, the respondent is encouraged to add relevant subtasks. Please include pricing assumptions in the pricing proposal narrative. Any proposal that does not include complete information or use the format as directed by Energy Trust may not be considered.

The PDC budget will consist of delivery costs and technical study service incentives. Delivery costs include the costs associated with delivering all the tasks within the Custom track including staffing and other direct costs described in Tasks 1 – 4. Service incentives include the cost of providing technical studies.

If the respondent is addressing Task 5: Program Enhancements, the respondent must include the optional delivery costs for the program enhancements section in the Price Proposal in tabs 4-6 and must include pricing assumptions in the price proposal narrative. These enhancements may expand on or streamline aspects of the program offerings. If the enhancement is reducing program cost, show the pricing as a negative number, and if it is additional program work, show the pricing as a positive number in the pricing template.

Respondent must assume:

- PDC Task 1: Transition is expected to start September 1, 2018;
- All other tasks will start January 1, 2019 (see [Appendix I](#)).
- Other direct costs should be priced according to associated subtasks; and
- Expenses should be transparent and the total weighted average hourly rate for all staff and subcontractor staff should be easily identifiable.

Under the new program design, it will be the PDC's responsibility to have qualified personnel, whether in-house or subcontracted, to deliver all Energy Trust-authorized technical analysis studies for participant sites located in PDC's territory. Energy Trust will not separately contract with ATACs. Technical studies will continue to be technical services funded via the program's service incentive funding.

Also, under the new design, it will be the PDC’s responsibility to have qualified personnel, whether in-house or subcontracted, to deliver both the SEM coaching and SEM technical model development services to Energy Trust for participant sites located in PDC’s territory. Energy Trust will not separately contract with SEM providers. SEM costs will be submitted under PDC delivery.

Respondent must include electric and gas savings for 2019 and 2020 for each territory the respondent is bidding on in [Appendix D: Tab 1 Summary](#). Below are Energy Trust’s 2019 Custom track savings targets for each territory. Energy Trust is open to respondent’s proposing their own savings goals, but would like to see SEM savings at a minimum of 15-20 percent of the total electric savings goal and 5 percent of the total gas savings goal for each territory.

Table 3: Working Savings By Utility

Territory	Working savings (kWh)		Working savings (therms)		
	PGE	Pacific Power	NW Natural	Cascade Natural Gas	Avista
1	25,000,000	-	250,000	-	-
2	22,000,000	15,000,000	440,000	15,000	-
3	-	19,000,000	210,000	35,000	8,000

**Working savings numbers are savings before evaluation factors and transmission and distribution losses or credits are applied.*

4.9 Qualifications (6 pages)

4.9.1 Project Team Qualifications

Proposals should describe respondent’s experience in successfully delivering comparable industrial energy-efficiency programs that include custom projects and strategic energy management offerings, as well as respondent’s capability for meeting the goals of Energy Trust’s Production Efficiency program.

Staffing Plan and Organizational Chart

Proposals should include:

- Respondent’s team (including subcontractors), including relevant experience, tenure and geographic locations of respondent’s designated lead program manager and other key personnel. Please include an organizational chart.
- How the respondent will fill the roles of PDC account manager, SEM provider and energy engineer/analyst. The PDC account manager cannot perform the SEM roles or be the energy engineer/analyst on the same project.
- Respondent should include resumes of key personnel as appendices. Resumes should not exceed one page in length and do not count toward the overall page count.

Team Experience

Proposal should illustrate the respondent’s experience in the following areas:

Program Delivery and Implementation

- Energy efficiency industrial program implementation experience, including past program performance;
- Program management expertise in setting and achieving energy savings goals within an assigned territory or market sector, tracking project status, forecasting and managing project activity to an incentive budget;
- Development and implementation of quality control plans and procedures, especially as related to program related documentation and analysis; and
- Program planning, development and implementation to expanding participation to meet diversity, equity and inclusion goals.

Customer Engagement

- Experience with industrial customers in Oregon and the Pacific Northwest, identifying the number and types of companies your firm has worked with;
- Experience with industrial companies outside Oregon and the Pacific Northwest; and
- Experience working with diverse industrial stakeholders and groups in the Northwest, including but not limited to small- to medium-sized businesses, minority- and women-owned businesses and businesses located in rural or low- to moderate-income areas.

SEM Experience

- Number of SEM engagements that respondent has implemented under contract to a resource acquisition program or directly to a customer over the last three to five years;
- Respondent's experience creating and implementing energy intensity models for SEM engagements at industrial sites, specifying whether these models were used as the basis for claiming energy savings;
- Respondent's experience in producing and conducting workshops in a classroom setting and/or through large events; and
- Technical capabilities in industrial systems and the ability to identify related energy efficiency opportunities.

Technical Experience

- Experience identifying cost-effective energy efficiency measures, performing energy efficiency technical analyses, and performing post installation verifications at industrial sites. Be specific about strengths in particular industries or system types;
- Technical team qualifications in energy engineering, detailed project analysis, and technical support for industrial energy efficiency; and
- Complete [Appendix F: Technical Capability Matrix](#) with the years of experience for each of the typical systems found in an industrial facility and provide an example of a technical study as an appendix (does not count against page limits).

Program Administration

- Experience with project processing (e.g. data entry, application processing, record keeping, quality and control); and
- Experience with IT systems management.

If a respondent's team includes subcontractors to develop and/or implement components of PDC services, then the proposal should describe relevant subcontractor experience. Proposals must include a letter of commitment to the proposed team by each subcontractor or consultant. Letters of commitment should be appended, and will not count toward the section or overall page count.

4.9.2. References

Include contact information for at least four references total:

- Provide a minimum of three references from parties knowledgeable about respondent's company generally and its experience delivering industrial program delivery work similar to the program work described in this RFP.
- At least one additional reference must have knowledge of the respondent's specific experience in delivering SEM services similar to those described in this RFP.

References must include name, title, address, telephone number and email. Energy Trust is especially interested in references who have had experience working directly with key team members identified in the proposal.

4.9.3. Licenses and Certifications

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.

Disclose relevant licenses and certifications of individuals on proposed team. If respondent or any of its team members does not have required licenses or professional certifications necessary for work proposed, respondent shall specify plans for obtaining any necessary license and professional certifications, or explain why such licenses or professional certifications are not needed.

4.10 Administrative (5 pages)

4.10.1. Conflict of Interest Disclosure

In one page or less, respondent should disclose any direct or indirect, actual or potential conflicts of interest respondent or proposed subcontractors has or would have with Energy Trust. A direct or indirect conflict of interest is 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, then the proposal should explicitly so state. Energy Trust has sole discretion to determine whether a conflict of interest exists.

4.10.2. Insurance

Proposals should include all insurance information in two pages or less. Energy Trust requires all PDCs 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, and any other statutory insurance coverage required. PDC's professional liability with errors and omissions coverage would need to specifically cover the professional services performed for the program.

Include a complete description of respondent's insurance coverage for performing the program work as described in this RFP, 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(s).

4.10.3. Financial Package

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);
- 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);
- 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 (this information, plus an authorization for a financial credit check, will be required for finalists);

- 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; and
- D-U-N-S® Number from Dun & Bradstreet, if available.

5. Proposal Submittal Process

5.1 Schedule

Posting of Request for Proposals	March 26, 2018
Intent to Respond deadline	April 3, 5:00 p.m.
Energy Trust Introduction Webinar	April 5, 10:00 a.m.
Deadline to submit written questions and requests for information	April 9, 5:00 p.m.
Posting of responses to submitted questions	April 13, 5:00 p.m.
Proposal Submission Deadline	April 27, 5:00 p.m.
Invitations for interviews issued to finalists	May 15, 2018
Interviews conducted	May 21 – May 25, 2018
Selection and notification to respondents	July 16, 2018
Board meeting to request authorization for contracting with selected respondent	July 26, 2018

All times listed are Pacific Daylight Time (PDT).

5.2 Intent to Respond

Energy Trust will only accept proposals from parties who have submitted an **Intent to Respond** form ([Appendix B](#)) no later than the date and time shown in the schedule above. Forms should be delivered via email to Kate Hawley at kate.hawley@energytrust.org.

Email should include in the subject line the option(s) on which the respondent is bidding, as well as a reference to this RFP (i.e., "Intent to Respond – Production Efficiency: Custom and Strategic Energy Management 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.

5.3 Questions and Requests for Additional Information

Any questions and/or requests for clarification or additional information regarding this RFP must be submitted in writing, via email, according to these **Section 5.3** instructions and received by Energy Trust by the date and time listed in the schedule to Kate Hawley at kate.hawley@energytrust.org.

These emails must be clearly labeled with a subject line "Request for Clarification—Custom and Strategic Energy Management 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**. Energy Trust staff is not available for verbal conversations with individual bidders 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.

5.4 Energy Trust Introduction Webinar

Energy Trust invites potential bidders to participate in an Energy Trust Introduction Webinar. The webinar will provide an overview of the new Custom track design, roles and responsibilities of PDCs and Energy Trust, RFP requirements, and the importance of a diversity, equity and inclusion approach. There will be time for questions and discussion following the presentation.

Register with GoToWebinar by using the active links below:

- [Energy Trust Webinar](#) on April 5 at 10 a.m. PDT
- Contact Kate Hawley at kate.hawley@energytrust.org if you are having trouble registering. All attendees will be expected to identify themselves.

5.5 Proposal Submittal and Method of Delivery

All proposals must be clear, complete and concise. Pages must be numbered, sections must be clearly titled and fonts must not be smaller than 11 point. Energy Trust requests that proposals are printed double-sided on 8.5-inch by 11-inch recycled paper and packaged without spiral bindings or non-recyclable binders/folders.

Respondents must submit eight (8) hard copies and one electronic copy of the complete proposal. The electronic copy can be submitted as a PDF or secure Word file. One submitted hard copy must contain original signatures on the cover and signature page (**Appendix C**). Respondents may deliver their proposal to Energy Trust by hand, U.S. mail or courier service at the address listed below. Faxed submittals will not be accepted. Electronic copy must be emailed to Kate Hawley at kate.hawley@energytrust.org.

Energy Trust will accept proposals no later than the date and time indicated in the schedule. Energy Trust will not be obligated to consider information received after this deadline. Submit proposals to:

Kate Hawley, Sr. Project Manager (Contractor)
Energy Trust of Oregon

421 SW Oak St, Suite 300
Portland, OR 97204

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

5.6 Withdrawal and Modification of Proposals

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

5.7 Revisions to RFP

If it becomes necessary to revise any part of this RFP, Energy Trust will issue an addendum and provide the addendum to all parties who submitted an **Intent to Respond**. Potential respondents should contact Energy Trust if any inconsistencies or ambiguities are found in the RFP. Clarification given by Energy Trust may become an addendum to the RFP.

5.8 Validity and Deadlines

Proposals should specify the date through which the proposal is valid. At a minimum, proposals should be valid for 180 days from the proposal receipt deadline.

6. Proposal Evaluation Process and Criteria

This section explains how Energy Trust will evaluate proposals. It describes the evaluation stages and scoring criteria for proposals.

6.1 Proposal Selection Criteria

Proposal selection will be the sole responsibility of Energy Trust. A team of reviewers consisting of Energy Trust staff and energy 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; and/or
- Energy Trust determines that a conflict of interest exists.

6.2 Proposal Evaluation and Notification for Interview

Energy Trust will review the proposals in accordance with the scoring criteria identified in Section 6.3 below. Interviews may be scheduled with the finalists. Energy Trust will re-score following interviews and initiate negotiations with the leading respondent(s) whose proposal(s) ranked highest in the evaluation process.

6.3 Scoring Criteria

The following selection criteria, and any other criteria that Energy Trust deems relevant, will be used to rank and select proposals. The selection criteria below will be applied to proposals that are not eliminated from consideration as described in [Section 6.1](#).

Criteria	Weight	Description
Cost and Energy Savings	40%	Price Proposal and Energy Savings: <ul style="list-style-type: none"> • Adequate FTE allocation for management and implementation of Program • Energy savings goals achievable and appropriate • Competitive labor rates and subcontractor costs • Competitive other direct costs
Strength and Cohesion of PDC Team	25%	Project Team Qualifications and Experience: <ul style="list-style-type: none"> • Customer engagement • Technical expertise in multiple industrial target markets and common industrial systems • Strategic Energy Management, including implementing workshops and developing energy intensity models • Program management
Strength of Proposal	20%	Program approach to: <ul style="list-style-type: none"> • Customer engagement • Custom offering delivery • Strategic Energy Management delivery • Program management
Diversity, Equity and Inclusion	15%	Strength of proposal: Diversity, equity and inclusion deployment strategy (Section 4.3) <ul style="list-style-type: none"> • Comprehensive approach to engaging and increasing participation to underserved businesses, which includes: small- to medium-sized businesses, minority- and women-owned businesses and businesses located in rural or low-to moderate-income areas. • Data Collection. Describe qualifications, experience and approach to developing baseline data and collecting market, customer and participant demographic data to track performance over time

		<p>Diversity, equity and inclusion firmographics and qualifications (Section 4.7)</p> <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 and support implementation of Energy Trust’s DEI goals and objectives
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7. Governing Provisions

All submitted proposals are subject to the following governing provisions:

7.1 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 the respondent explicitly understands the following provisions of this RFP and all other provisions set forth in this RFP.

7.2 Right to Accept or Reject

Energy Trust reserves the right to make multiple awards; reject any and all proposals; waive any nonconformity in proposals received; accept or reject any or all of the items in the proposal; or 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 details of proposals prior to contracting.

7.3 Criminal Record and Credit Check

Energy Trust might require respondents selected as finalists to this RFP to consent to a combined criminal record and credit check to proceed in the process. Energy Trust will obtain the respondent’s consent to proceed with these checks.

7.4 Confidentiality

Except in the case of litigation or other legal disclosure and/or audit requirements, Energy Trust will not disclose information submitted in response to an RFP to any third party.

7.5 Ownership of Responses

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

7.6 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 this RFP. Any addendum to this RFP will be in written form.

7.7 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.

7.8 Waiver of Claims

The respondent waives any right it might otherwise 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.

7.9 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 its 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 respondents 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, and/or
- Enter into relationships with more than one respondent.

7.10 Resulting Contract

This RFP does not constitute an offer to contract with any party for any purpose. Energy Trust does not consider any response to this RFP to constitute an agreement to enter into any 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 typically 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.

Appendices

[Appendix A - PDC Territories](#)

[Appendix B- Intent to Respond](#)

[Appendix C- Cover Sheet and Signature Page](#)

[Appendix D - PDC Pricing and Savings Proposal Template](#)

[Appendix E - PE Roles and Responsibilities](#)

[Appendix F - Technical Capability Matrix](#)

[Appendix G -Industrial Sector Trends Report](#)

[Appendix H - Market Trends](#)

[Appendix I - Contracting Information](#)

[Appendix J - IT Requirements](#)

[Appendix K - Technical Analysis Study Cost History](#)

[Appendix L - Strategic Energy Management Background](#)

[Appendix M - Technical Analysis Study Template](#)