Energy Trust of Oregon
Request for Proposals
Business Program Management and Delivery Services

• Existing Buildings, Oregon—Includes Existing Multifamily, Energy Performance Management, New Customer Strategies and Opportunity Areas

• Commercial Buildings Southwest Washington

• Commercial and Industrial Business Lighting, Oregon—Includes New Customer Strategies and Opportunity Areas

Proposal Submittal Deadline:
April 17, 2020, 5:00 p.m. (PPT)

RFP Issue Date: March 9, 2020
Intent to Respond Submittal Deadline: March 16, 2020
Proposal Submittal Deadline: April 17, 2020
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1. Introduction

Energy Trust of Oregon, Inc. (Energy Trust) is seeking proposals through this Request for Proposals (RFP) for one or two prime energy-efficiency program implementation contractors to perform the following program management and delivery services for Energy Trust, as independent contractors:

- **Program Management Contractor (PMC) services** to design, develop and implement Energy Trust’s non-lighting retrofit program offerings for Existing Buildings, Existing Multifamily, and Energy Performance Management in Oregon, as well as NW Natural Gas commercial customers in Southwest Washington. The PMC team will also develop and deliver New Customer Strategies and Opportunity Areas to support longer-term strategic program planning and pilot development and expanded outreach.

- **Program Delivery Contractor (PDC) services** to design, develop and deliver Energy Trust’s Commercial and Industrial Business Lighting program offerings. The PDC team will also develop and deliver New Customer Strategies and Opportunity Areas, specific to lighting, to support longer-term strategic program planning and pilot development and expanded outreach.

Respondents can submit a response to this RFP for

- Option 1: PMC services (only),
- Option 2: PDC services (only), or
- Option 3: PMC and PDC services (both).

Section 2 of this RFP provides additional detail on these options. Respondents are allowed and encouraged to team with other firms to provide the most complete and compelling package of services. Energy Trust has a goal of providing participation opportunities for minority-owned, woman-owned, emerging small and service-disabled veteran-owned business enterprises, as well as for the community-based organizations that support rural and diverse populations across the geographic territories Energy Trust’s programs serve.

Consideration for selection under this RFP includes the respondent’s demonstrated support of Diversity, Equity and Inclusion (DEI) within its firm and proposed team, its proposed program design strategies to reach diverse participants, and its ability to identify meaningful scopes and successfully partner with DEI subcontractors to deliver the services. DEI subcontractor participation, representing a portion of the contract value, is required for this RFP. See Section 2.2, Part 9: DEI Subcontracting Plan for additional information.

The energy-efficiency program implementation services described in this RFP are currently delivered through two program management contracts, and one program delivery contract, all of which will expire on December 31, 2020. The current PMCs and PDC are not prohibited from responding to this RFP.
To provide seamless customer service to program participants, Energy Trust expects to have a transition agreement in place with incoming contractor(s) by the beginning of September 2020, and all required contracting and transition and development work completed to implement full delivery of the program services by January 1, 2021. The anticipated duration of the contract(s) is three years, with the option of up to two (2) one-year extensions.

1.1 RFP Schedule

Table 1 below delineates the due dates (and times, as applicable) for each of the scheduled events for this RFP.

<table>
<thead>
<tr>
<th>Event</th>
<th>Due Date (and Time)</th>
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<tbody>
<tr>
<td>Posting of Request for Proposals</td>
<td>March 9, 2020</td>
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<tr>
<td>Introduction to Energy Trust informational session (Pre-bid Webinar)</td>
<td>March 12, 2020 10:00 a.m.</td>
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<tr>
<td>Deadline to submit written questions and requests for clarification</td>
<td>March 16, 2020 5:00 p.m.</td>
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<tr>
<td>Intent to Respond/Interest in Teaming form submittal deadline</td>
<td>March 16, 2020 5:00 p.m.</td>
</tr>
<tr>
<td>Posting of responses to submitted questions/requests for clarification</td>
<td>March 23, 2020 5:00 p.m.</td>
</tr>
<tr>
<td>Proposal submittal deadline</td>
<td>April 17, 2020 5:00 p.m.</td>
</tr>
<tr>
<td>Invitations for interviews issued to finalists</td>
<td>Week of May 18, 2020</td>
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<td>Interviews conducted</td>
<td>May 26–29, 2020</td>
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<tr>
<td>Selection and notification to respondents</td>
<td>Week of June 19, 2020</td>
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<tr>
<td>Board meeting to request authorization for contracting with selected respondent</td>
<td>July 15, 2020</td>
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All times listed are Prevailing Pacific Time (PPT). Energy Trust reserves the right to modify this schedule – see Section 5.9: Energy Trust Rights Reserved.

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’s services, cash incentives and energy solutions have helped participating Oregon customers of the following five utilities: Portland General Electric (electric), Pacific Power (electric), NW Natural (natural gas), Cascade Natural Gas (natural gas) and Avista (natural gas) save nearly $7.7 billion on their energy bills. Energy Trust also serves customers of NW Natural in Washington. The cumulative impact of the organization’s leadership since 2002 has been a contributing factor in the region’s low energy costs and in building a
Introduction

Energy Trust programs are designed to acquire cost-effective electric and natural gas energy-saving resources. Energy Trust operates without preference toward manufacturer, contractor or distributor and is fuel neutral. Fuel neutrality means that while Energy Trust and its program management and delivery contractors can provide information on the performance and payback of any equipment and may provide incentives for cost-effective energy-efficiency upgrades for gas or electric equipment, they do not advise energy users to select a particular fuel nor provide incentives for the fuel conversion itself.

To acquire cost-effective electric and natural gas savings, Energy Trust offers financial incentives and technical and design services to help customers improve the energy efficiency of their homes and businesses. Energy Trust requires that all measures be cost-effective in order to qualify for incentive funding. You can find additional information about cost-effectiveness and the Cost-effectiveness Fact Sheet on Energy Trust’s website.

Energy Trust operates under a 2020-2024 Strategic Plan that focuses on maximizing its energy efficiency and renewable energy investments for the benefit of customers. The plan lays out five areas of focus that should be considered in responses to this RFP:

- Provide relevant programs, information and services for all customers
- Strengthen the value Energy Trust delivers by linking clean energy to utilities responding to changing customer energy needs
- Provide objective information and analyses to support energy policies
- Maximize public benefits by leveraging additional funding
- Enhance Energy Trust’s ability to quickly and effectively respond to changes, needs and opportunities

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. Energy Trust’s board of directors has adopted a Diversity, Equity and Inclusion Policy, and the organization finalized a Diversity, Equity and Inclusion Operations Plan in 2018 that includes specific goals and approaches for diversity, equity and inclusion activities. Certain requirements in this RFP are reflective of Energy Trust’s ongoing commitment to and implementation of activities that will achieve organizational diversity, equity and inclusion goals.

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. For more information about Energy Trust’s annual budget and contract development processes, see Appendix M: Contracting Information.
1.3 About the Business Program Services in this RFP

The energy-efficiency program services and offerings described below in this section are within the scope of this RFP. Information about Energy Trust’s current program offerings, as well as copies of its most recent program impact and process evaluations, is also available for review on the Energy Trust website. See https://www.energytrust.org/about/reports-financials/documents/ and filter by Evaluations to find those applicable to the programs described in this RFP.

Energy Trust’s program management and delivery contractors collaborate closely with Energy Trust and with its other contractors and allies in the marketplace. Additional information that should inform submitted proposals is provided in the Appendices to this RFP, which are listed in Section 6, Index to Appendices.

A. Existing Buildings Program

The Existing Buildings program serves non-residential commercial and public sector customers implementing cost-effective upgrades in existing buildings within Energy Trust’s service territory, including, but not limited to, all types of office, retail, hospitals, schools, restaurants, hotels and government facilities, located in the five Oregon utility service territories. The program offerings include financial incentives and technical services.

A program management contractor oversees the program design, delivery, marketing, outreach and technical project support, trade ally management and coordination, and management of specialized subcontractors for the program. The program management contractor is also accountable for reporting, data management, incentive processing and call center support.

Program savings are acquired through custom, standard, and operations and maintenance (O&M) approaches. Custom savings for equipment upgrades are calculated through energy modeling and analysis. Standard savings are pre-calculated through a coordinated measure approval process to develop prescribed measure savings. O&M savings are determined through regression analysis using meter data. Lighting offerings and incentives are currently delivered by a specialized subcontractor and are closely coordinated with Energy Trust’s Industrial and Existing Multifamily program lighting offerings.

For more information on Existing Buildings proposal components, see Appendix A: Existing Buildings.

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1 NOTE the following energy-efficiency program services are not in scope: In Oregon, new construction and major renovation (projects triggering code) are served by Energy Trust’s New Buildings program. Non-lighting industrial projects are served by Energy Trust’s Production Efficiency Industrial and Agriculture program. In both Oregon and Washington, Energy Trust’s Residential program serves existing and new single-family customers and delivers residential home products.
B. Energy Performance Management Program

Energy Performance Management (EPM) offerings under the Existing Buildings program include Strategic Energy Management (SEM) and pay-for-performance (PfP). The Existing Buildings program management contractor currently teams with SEM energy coaching firms to deliver SEM services to customers. SEM is a continuous improvement program offering that combines technical analysis of energy usage with the development of persistency plans with operations, maintenance and behavioral actions that help reduce energy usage and create incremental savings for multiple years.

For more information on EPM proposal components, see Appendix B: Energy Performance Management.

C. Existing Multifamily Program

The Existing Multifamily program serves low-income and market-rate multifamily properties of two or more attached units, assisted living facilities and campus living facilities. Program offerings include custom and standard incentives and technical services. Through 2020, the program will deliver direct installs for in-unit instant savings measures, including light bulbs, showerheads and aerators, and advanced power strips.

This program is currently delivered by a separate program management contractor and uses a lighting subcontractor to deliver lighting services in coordination with the Industrial and Existing Buildings programs. An additional subcontractor delivers the in-unit multifamily instant savings measures. Beginning in 2021, the Existing Buildings program management and delivery contractor services will include delivery to customers currently served by the Existing Multifamily program.

For more information on Existing Multifamily proposal components, see Appendix C: Existing Multifamily.

D. Commercial Buildings Program—Southwest Washington

In 2009, following approval by the Washington Utilities and Transportation Commission (WUTC), Energy Trust began providing energy-efficiency services to NW Natural’s residential and commercial customers in Southwest Washington. Energy Trust has a separate agreement and budget with NW Natural to perform this work, and reporting must conform to WUTC requirements. Under regulation by the WUTC, the program uses a Washington-specific natural gas avoided cost for NW Natural that is subject to greater variability than that for Oregon due to Washington’s status as an expanding market. This difference has not yet led to any major program differences between the two states; however, a recent increase in the avoided cost for Washington could drive a need for different offerings. Respondents should be aware that the WUTC requires that measures for Washington delivery be evaluated separately for cost-
effectiveness and efficacy, which could also lead to differences in gas measure offerings and incentives.

Although it is managed by the Existing Buildings program management contractor, the Washington program serves a broader range of building types than does the Oregon program, as long as the building is served by a specified commercial NW Natural rate schedule, including existing and new buildings, existing and new multifamily buildings, and greenhouses. The Washington program utilizes a prescriptive incentive model, as well as a commercial custom track similar to the one offered in Oregon, with a smaller scale and budget. In 2020, the program introduced custom incentives for new commercial construction.

For more information on Commercial Buildings—Southwest Washington proposal components, see Appendix D: Commercial Buildings—Southwest Washington.

E. Business Lighting Program

As noted above, Energy Trust’s Commercial and Industrial lighting offerings are presented to the market as one program, but are currently contracted separately: lighting services are offered to industrial customers through a Production Efficiency program delivery contractor, and to commercial customers through subcontractors to Energy Trust’s respective program management contractors for Existing Buildings and Existing Multifamily.

Energy Trust’s business lighting offerings are focused on identifying, developing and delivering a menu of prescriptive and custom lighting measures, with estimated energy savings and incentives, and performing lighting analysis studies.

The programs’ coordinated lighting contractor services provide lighting trade ally management, delivery, design, outreach, technical support and pre/post installation verifications, forecasting, reporting, data management, and project processing and data entry functions.

Beginning in 2021, the Production Efficiency, Existing Buildings, and Existing Multifamily lighting program management and delivery services will be consolidated under one Business Lighting program delivery contractor. Energy Trust also anticipates working with the incoming contractor to complete a redesign of elements of its lighting offerings during 2020 to prepare for full launch by January 1, 2021.

For more information on Business Lighting proposal components, see Appendix E: Business Lighting.
F. New Customer Strategies and Opportunity Areas (NEW)

While the programs listed above identify near-term program enhancements as part of ongoing continuous improvement, Energy Trust is constantly looking for innovative, longer-term strategic approaches to expand and enhance program reach and impact among customers that have not historically participated in its programs.

With this RFP, Energy Trust is seeking to identify and develop specific focus areas and strategies to position programs for the future. This work should be designed to enable the program to expand its future reach and could include innovative technical and/or outreach solutions such as customer or community engagement strategies, market research, pilot offerings, pilot delivery, measure development approaches and more. Energy Trust expects the proposed budget for New Customer Strategies and Opportunity Areas to be five percent or less of the total proposal bid.

Examples of areas of interest include:

- **Low-income Multifamily**: Energy Trust’s multifamily program has been working on various strategies to engage with owners of low-income multifamily housing in both the metro area and in suburban and rural communities. Participation in this market is an important area for improvement to reach diversity, equity and inclusion goals.

- **Small/Medium Businesses, Particularly in Rural Areas**: Small businesses are traditionally one of the hardest types of customers to reach and engage. With many small businesses operating in leased space, the available range of cost-effective measures is limited. Energy Trust is interested in how the programs can engage more small businesses in energy efficiency and renewable energy, as well as in pilot ideas for offers that could provide value to these businesses and build on current strategies.

- **Trade Allies/Workforce Training**: Diversifying Energy Trust’s trade ally network to include more minority-owned, woman-owned and rural businesses is a high priority for the organization. Recruiting and supporting new trade allies through training will help Energy Trust reach a variety of diversity, equity and inclusion-related goals. Energy Trust is interested in solutions that help overcome barriers these allies may encounter with participating in its programs.

- **New Technologies/Innovative Program Delivery Pilots**: Pilots proposed for this area should focus on promising technologies or delivery approaches that require additional market testing to ensure market readiness. Pilots will not be required to generate savings in year one or year two, but they should envision cost-effective savings acquisition by the third year of program implementation.

Additional ideas are welcome. Energy Trust is especially interested in ideas and teaming arrangements designed to improve the program’s outreach to serve all its utility customers. Proposed approaches should establish clear objectives and metrics that support and build community outreach and future program energy savings pipelines, as well as expand the diversity of contractors and customers benefiting from Energy Trust’s program services and incentives in alignment with Energy Trust’s DEI goals.
Respondents are encouraged to consider subcontractors within the communities served as partners for this work. These could include, but are not limited to, community-based organizations. For more information on New Customer Strategies and Opportunity Areas proposal components, see Section 2.2, Part 2.D: New Customer Strategies and Opportunity Areas and Section 2.2, Part 3.B: New Customer Strategies and Opportunity Areas—Business Lighting.

1.4 Current Program Implementation Structure

Currently, one PMC delivers Energy Trust’s Existing Buildings program services, including delivery to commercial customers of NW Natural in Washington; one PMC delivers the Existing Multifamily program services; and one PDC delivers lighting for the Industrial and Agriculture programs. Lighting program services for Existing Buildings and Existing Multifamily are currently delivered through the respective PMCs.

1.5 Future Program Implementation Structure

With this RFP, Energy Trust is restructuring its existing business program services to address some identified near-term challenges and to support its longer-term strategic vision for the program. Among other planned improvements, Energy Trust is seeking to provide a more seamless experience for customers. Energy Trust embraces this RFP as an opportunity to improve alignment with go-to-market strategies, incentives, targeted outreach and measure development, and to develop program offerings that are more targeted and relevant to its markets.

Existing Multifamily program offerings will be integrated with the Existing Buildings PMC services for implementation as of January 1, 2021. Commercial and Industrial Lighting program services will be consolidated into a single Business Lighting PDC responsible for program management and delivery of all Business Lighting services. In addition to preparing for delivery of existing program services, a new midstream delivery approach will be developed for implementation as of January 1, 2021.

1.6 RFP Objectives

Over the next three to five years, Energy Trust’s programs will be challenged to become more responsive to changing market conditions. Changes in codes, standards and market practices may reduce the cost-effectiveness of projects, key measures that deliver electric and gas savings will expire, and the average savings per project is expected to decline.
To address these challenges, Energy Trust is looking to develop tailored and targeted strategies that deepen existing customer relationships, reach new customers and encourage repeat participation. Energy Trust is also seeking new measures, new approaches, and efficiencies in program design and delivery.

Respondents should consider the following Energy Trust objectives in designing a response to this RFP. Proposals should align with Energy Trust’s 2020-2024 Strategic Plan and organizational goals and address how the respondent will:

1. Meet Energy Trust's goals with efficient and effective implementation
   - Deliver a balanced portfolio of energy savings that meets Energy Trust’s energy savings goals
   - Support Energy Trust in meeting DEI goals
   - Align the cost of program delivery to the value of expected energy savings over the next five years

2. Collaborate with external partners as well as other Energy Trust programs
   - Collaborate and coordinate with other Energy Trust program management and delivery contractors to ensure customers receive comprehensive customer service and are guided toward the solutions that best meet their needs
   - Develop implementation structure and strategies to support Energy Trust’s DEI goals, leverage a diverse pool of subcontractors, expand the pool of qualified Certification Office for Business Inclusion and Diversity (COBID)-eligible contractors and trade allies, reach small and rural customers, and expand services to customers and communities
   - Engage with and leverage key partners such as the utilities, Oregon Department of Energy, Oregon Housing and Community Services, Northwest Energy Efficiency Alliance (NEEA) and Bonneville Power Administration (BPA). See Appendix F: Coordination and Collaboration for additional information.

3. Increase management and delivery flexibility to reach more customers and meet customer needs
   - Implement broad-reaching tactics that engage all market segments, customer types and regions within Energy Trust's territories
   - Streamline offerings and develop comprehensive and consistent go-to-market strategies
   - Ensure Energy Trust services and incentives are appealing to customers and address market barriers and motivations
   - Develop approaches that support single point of contact for customers, utilizing local outreach staff with technical capabilities and deep knowledge of Energy Trust offerings, including solar
   - Deploy strategies that help customers establish comprehensive multi-year energy plans that address capital and operations & maintenance opportunities
   - Develop customer-focused paths that create repeat participation
4. Innovate and identify new opportunities

- Anticipate barriers in the marketplace and develop innovative solutions that drive new products and create new opportunities
- Anticipate potential savings declines in key electric and gas offerings, and identify key measures that are new or can provide increased savings
- Develop long-term strategies to achieve energy savings goals beyond 2021
2. Proposal Format and Content

2.1 Proposal Format

Respondents may submit proposals to bid on:

- Option 1: PMC services (only),
- Option 2: PDC services (only), or
- Option 3: PMC and PDC services (both).

Structure the nine-part response according to the Proposal Outline in Figure 1 below.

**Figure 1. Proposal Outline (continued on next page)**

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Figure 1. Proposal Outline (continued)

**Part 4: Program Implementation (PMC and PDC) Services**
- A. Budget and Savings Goals Development
- B. Forecasting and Pipeline Management
- C. Energy Engineering, Analysis and Technical Support
- D. Measure Development and Evaluation Support
- E. Trade Ally and Contractor Engagement
- F. Marketing
- G. Outreach and Ongoing Project Support
- H. Customer Service
- I. Reporting and Invoicing
- J. Operations and Controls
- K. Information Technology
- L. SEM Delivery (PMC only)

**Part 5: Implementation Plans and Schedules**
- A. Transition Plans
- B. Transition Schedule
- C. Implementation Plans
- D. Implementation Schedule

**Part 6: Pricing and Savings Proposal**

**Part 7: Qualifications**
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**Part 8: Administrative**
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**Part 9: DEI Subcontracting Plan**

2.2 Proposal Content

The submitted proposal must address respondent’s model for delivering the program services it is proposing (Option 1, 2, or 3) as described in this RFP. Proposal(s) should reflect a customer-based focus, designed to best serve Energy Trust’s customers. Proposals should reflect respondent’s understanding of the requirements described in this RFP and consideration of Energy Trust’s goals. The submitted proposal(s) must address the Parts relevant to the selected Option(s) as indicated in Table 2 below.

Where “Required” is noted in the table, respondent must submit that specific Part for the proposal. If submitting Option 3, the PMC and PDC proposals must be separate and distinct unless otherwise indicated in Table 2:
Table 2. Required Proposal Parts (by Option)

<table>
<thead>
<tr>
<th>Proposal Part</th>
<th>Proposal Part Heading</th>
<th>Option 1: PMC only</th>
<th>Option 2: PDC only</th>
<th>Option 3: PMC &amp; PDC</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Introduction</td>
<td>Required</td>
<td>Required</td>
<td>A single Part 1 suffices if submitting for Option 3</td>
</tr>
<tr>
<td>2</td>
<td>Program Management Contractor (PMC) Services</td>
<td>Required</td>
<td>n/a</td>
<td>Required</td>
</tr>
<tr>
<td>3</td>
<td>Program Delivery Contractor (PDC) Services</td>
<td>n/a</td>
<td>Required</td>
<td>n/a</td>
</tr>
<tr>
<td>4</td>
<td>Program Implementation (PMC and PDC) Services</td>
<td>Required</td>
<td>Required</td>
<td>Required</td>
</tr>
<tr>
<td>5</td>
<td>Implementation Plan and Schedule</td>
<td>Required</td>
<td>Required</td>
<td>Required</td>
</tr>
<tr>
<td>6</td>
<td>Pricing and Savings Proposal</td>
<td>Required</td>
<td>Required</td>
<td>Required</td>
</tr>
<tr>
<td>7</td>
<td>Qualifications</td>
<td>Required</td>
<td>Required</td>
<td>Required</td>
</tr>
<tr>
<td>8</td>
<td>Administrative</td>
<td>Required</td>
<td>Required</td>
<td>Required</td>
</tr>
<tr>
<td>9</td>
<td>DEI Subcontracting Plan</td>
<td>Required</td>
<td>Required</td>
<td>Required</td>
</tr>
</tbody>
</table>

The selected program implementer will be responsible for day-to-day delivery of all program services and for ensuring that savings objectives and goals are met on budget. Part 4 is applicable to both PMC and PDC program implementation; in Part 2 and/or Part 3 of the proposal, respondent will address additional program-specific components:

**Team:** Proposals should illustrate how respondent will provide effective management of its team, as well as respondent’s knowledge of market needs, identification of solutions, and descriptions of how and why respondent’s team and approaches will support Energy Trust and its customers, and save energy at the lowest cost. Include examples and references where relevant to specific experience with a key program element.

**Program Design and Management:** Respondent should consider the key objectives noted in Section 1.6: RFP Objectives of this RFP when developing its proposed program design strategies and delivery approaches. Program approaches, delivery models and strategies proposed should support Energy Trust’s focus on intentional design of programs and operations to serve all utility customers. Investments in energy efficiency and renewable energy lower energy costs, cut carbon emissions and strengthen local communities, resulting in economic benefits for all; however, more can be done to reach communities of color, low- and moderate-income customers and rural communities. Energy Trust is interested in respondent’s ideas and how application of a DEI lens informed its proposed program strategies and approaches.
Diversity, Equity and Inclusion: Respondent should integrate DEI outreach and outcomes in the program design approaches in its proposal. Use Part 2.A.3, 2.B.3, 2.C.3, and/or Part 3.A.3 of the proposal to highlight and connect the ways in which respondent’s proposed team and strategies will support Energy Trust’s DEI goals to increase participation of customers and trade allies.

Coordination/Collaboration: Energy Trust requires that all program management and delivery contractors work effectively across programs to promote referrals across Energy Trust’s energy efficiency and renewable program portfolio and to provide integrated offerings and seamless customer service for all customers. For the program design described in this RFP to be successful, it will be imperative for the PMC and PDC program implementation team(s) to effectively collaborate, engage and communicate to deliver cohesive and efficient customer service to Energy Trust and its customers. Additional details about coordination and collaboration expectations are included in Appendix F: Coordination and Collaboration. Use Part 2.A.4, 2.B.4, 2.C.4 and/or Part 3.A.4 of the proposal to specifically address respondent’s proposed coordination and collaboration plan and how it will support Energy Trust’s goal of providing a seamless customer experience with one point of contact when possible.

Program Enhancements: Respondent may, as noted in Part 2.A.5, 2.B.5, 2.C.5, and/or Part 3.A.5, as part of its program design strategy, propose additional (optional) near-term (i.e., 2021) program enhancements to augment existing program services and offerings. Proposed enhancements must demonstrate market readiness, for example, a market-ready approach, technology, or process that, while new to Energy Trust, has already been implemented and proven elsewhere.

Energy Trust may or may not opt to adopt proposed program enhancement(s). If respondent opts to submit a proposed enhancement, it should specifically detail and delineate the associated scope and dollars in the program design narrative and Pricing and Savings Proposal, and provide clear rationale and need, benefits of adoption, savings sources and estimates, any data supporting the enhancement, as well as best practices and/or examples from respondent’s experience implementing the enhancement in similar programs.

The following sections describe the detailed information expected in each Part of respondent’s proposal.
Part 1: Introduction *(4 page maximum)*

A. Cover Page

Respondent shall include a cover page with its proposal that clearly identifies the legal business name of the entity submitting the proposal, along with contact information and a completed Appendix Q: Representations and Signature Page 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 must be used to identify sections and must be clearly marked.

C. Executive Summary

Provide an executive summary that:

- Clearly indicates which RFP Option (1, 2 or 3) respondent's proposal is addressing;
- 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 Management Contractor (PMC) Services *(25 page maximum)*

A. Existing Buildings (including Multifamily) Program Design

1. Team

Detail respondent team’s capabilities and any key partnerships for managing and delivering the Existing Buildings program services, including existing multifamily. Include:

- An organizational chart identifying the expected management structure of the team. Include any proposed subcontractors that would deliver portions of the program services, clearly indicating their roles and responsibilities.
- An outline of the hierarchical distribution of labor across the team; provide both a description and a graphic to show how all program components and team members will work together to achieve the program objectives and identify key point(s) of contact with Energy Trust.
- Identification of all key personnel, along with position title, primary responsibilities, and expected full-time equivalent (FTE) designation for each title. Detail the location of the identified personnel, delineating Portland-based staff and staff that are or would be located in home or field offices outside of the Portland metropolitan area.
Respondent will provide additional supporting information about its team members in its Part 7: Qualifications portion of the response.

2. Program Design and Management
Describe respondent’s approach and methodology to implement the Existing Buildings program services including multifamily services, as detailed in this RFP, to accomplish savings, and provide respondent’s rationale for the proposed approach. Appendix A: Existing Buildings, Appendix C: Existing Multifamily and other relevant Appendices should inform this portion of the proposal.

Illustrate how respondent will deliver the program’s services to all relevant existing buildings market sectors, including without limitation the addition of all existing multifamily market sectors, throughout Energy Trust’s Oregon territory.

This portion of the proposal must clearly address and demonstrate respondent’s awareness and understanding of the program’s major target markets and trade ally and service channels throughout Energy Trust’s Oregon territory, both for existing commercial/public buildings as well as for existing multifamily buildings. Discuss the strategies and methods respondent is proposing to use to deliver services to each specified target market and location. This section of respondent’s proposal must include a comprehensive description of how respondent will successfully deliver a balanced delivery strategy that is designed to help steer commercial customers toward the offering that best meets their needs.

Respondent must specifically describe how respondent’s proposed strategy, approach and solutions will achieve 2021 and 2022 Oregon utility-specific working savings targets.

The preliminary 2021 first-year annual savings targets identified in Table 3 below were developed as part of Energy Trust’s 2020-2021 budget cycle. The 2021 budget and savings goals will be updated during Energy Trust’s 2021-2022 budget cycle and will be influenced, among other things, by the outcome of this RFP process.

Savings projections for 2022 have not yet been developed; respondent will propose 2021 and 2022 energy savings targets in the response.

<table>
<thead>
<tr>
<th>2021 Existing Buildings (including Multifamily) Program Goals</th>
<th>Working Savings Target</th>
<th>Incentive Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portland General Electric</td>
<td>36,476,703 kWh</td>
<td>$8,639,608</td>
</tr>
<tr>
<td>Pacific Power</td>
<td>21,698,048 kWh</td>
<td>$4,186,208</td>
</tr>
<tr>
<td>NW Natural</td>
<td>1,146,472 therms</td>
<td>$2,346,204</td>
</tr>
<tr>
<td>NW Natural Schedule 360 Industrial Demand Side Management</td>
<td>698,893 therms</td>
<td>$1,391,463</td>
</tr>
<tr>
<td>Cascade Natural Gas</td>
<td>325,307 therms</td>
<td>$758,378</td>
</tr>
</tbody>
</table>
Include a clear description of the savings that will be delivered by each program offering as well as the incentives that will be necessary to drive these savings.

Respondent must clearly tie the elements described in the written proposal narrative to respondent’s Pricing and Savings Proposal. Reference Appendix I: Existing Buildings + EPM + Existing Multifamily—Oregon Measure Build-Up to complete the measure-specific buildup for the savings and incentives that are included in the Pricing and Savings Proposal.

3. Diversity, Equity and Inclusion
Clearly explain how respondent’s proposed program strategies will help the program achieve DEI goals.

4. Coordination/Collaboration
Specifically address respondent’s coordination and collaboration plan to address the needs outlined in Appendix F: Coordination and Collaboration.

5. Program Enhancements (Optional)
Identify any proposed program enhancements.

B. Energy Performance Management Program Design

1. Team
Detail respondent team’s capabilities and any key partnerships for managing and delivering the EPM program services. Include:

- An organizational chart identifying the expected management structure of the team. Include any proposed subcontractors that would deliver portions of the program services, clearly indicating their roles and responsibilities.
- Outline the hierarchical distribution of labor across the team; provide both a description and a graphic to show how all program components and team members will work together to achieve the program objectives and identify key point(s) of contact with Energy Trust.
- Identify all key personnel, along with position title, primary responsibilities, and expected full-time equivalent (FTE) designation for each title. Detail the location of the identified personnel, delineating Portland-based staff and staff that are or would be located in home or field offices outside of the Portland metropolitan area.

Respondent will provide additional supporting information about its team members in its Part 7: Qualifications portion of the response.
2. Program Design and Management
Describe respondent’s approach and methodology to deliver the Energy Performance Management program services, as detailed in this RFP to accomplish savings, and provide respondent’s rationale for the proposed approach. Appendix B: Energy Performance Management and other relevant Appendices should inform this portion of the proposal.

The preliminary 2021 first-year annual savings targets identified in Table 4 below were developed as part of Energy Trust’s 2020-2021 budget cycle. The 2021 budget and savings goals will be updated during Energy Trust’s 2021-2022 budget cycle and will be influenced, among other things, by the outcome of this RFP process.

Savings projections for 2022 have not yet been developed; respondent will propose 2021 and 2022 energy savings targets in the response. The savings and incentives projection information provided in Table 4 below is included in and a subset of, not additional to, the Existing Buildings’ EPM information provided in Table 3 above. The purpose of including this subset Table 4 is to provide respondents with additional visibility into Energy Trust’s Strategic Energy Management-specific savings and incentives projections.

<table>
<thead>
<tr>
<th>2021 SEM Program Goals</th>
<th>Working Savings Target</th>
<th>Incentive Budget²</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portland General Electric</td>
<td>4,820,597 kWh</td>
<td>$264,290</td>
</tr>
<tr>
<td>Pacific Power</td>
<td>3,946,398 kWh</td>
<td>$216,361</td>
</tr>
<tr>
<td>NW Natural</td>
<td>199,119 therms</td>
<td>$109,167</td>
</tr>
<tr>
<td>NW Natural—Schedule 360</td>
<td>143,385 therms</td>
<td>$78,611</td>
</tr>
<tr>
<td>Industrial Demand Side Management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cascade Natural Gas</td>
<td>77,966 therms</td>
<td>$42,745</td>
</tr>
<tr>
<td>Avista</td>
<td>9,361 therms</td>
<td>$5,132</td>
</tr>
</tbody>
</table>

Respondent must clearly tie the elements described in the written proposal narrative to respondent’s Pricing and Savings Proposal. Reference Appendix I: Existing Buildings + EPM + Existing Multifamily—Oregon Measure Build-Up to complete the measure-specific buildup for the savings and incentives that are included in the Pricing and Savings Proposal.

² Incentives noted here are customer incentives ONLY. While some SEM coaching services are payable as service incentives, this is an area where the selected respondent will work with Energy Trust to identify tasks that may qualify for service incentive funding. For the purpose of this proposal, all identified SEM coaching services should simply be budgeted as program delivery costs (instead of incentives).
3. **Diversity, Equity and Inclusion**
Clearly explain how respondent’s proposed program strategies will help the program achieve DEI goals.

4. **Coordination/Collaboration**
Specifically address respondent’s coordination and collaboration plan to address the needs outlined in Appendix F: Coordination and Collaboration.

5. **Program Enhancements (Optional)**
Identify any proposed program enhancements.

**C. Commercial Buildings Program Design – Southwest Washington**

1. **Team**
Detail respondent team’s capabilities and any key partnerships for managing and delivering the Commercial Buildings – Southwest Washington program services. Include:

   - An organizational chart identifying the expected management structure of the team. Include any proposed subcontractors that would deliver portions of the program services, clearly indicating their roles and responsibilities.
   - Outline the hierarchical distribution of labor across the team; provide both a description and a graphic to show how all program components and team members will work together to achieve the program objectives and identify key point(s) of contact with Energy Trust.
   - Identify all key personnel, along with position title, primary responsibilities, and expected full-time equivalent (FTE) designation for each title. Detail the location of the identified personnel, delineating Portland-based staff and staff that are or would be located in home or field offices outside of the Portland metropolitan area.

   Respondent will provide additional supporting information about its team members in its [Part 7: Qualifications](#) portion of the response.

2. **Program Design and Management**
Describe respondent’s approach and methodology to implement the Commercial Buildings—Southwest Washington program services, as detailed in this RFP, to accomplish savings, and provide respondent’s rationale for the proposed approach. Appendix D: Commercial Buildings—Southwest Washington and other relevant Appendices should inform this proposal.

   Illustrate how respondent will deliver the program’s services to all relevant existing buildings market sectors, including without limitation the addition of all existing multifamily market sectors, throughout Energy Trust’s Washington territory.

   This portion of the proposal must clearly address and demonstrate respondent’s awareness and understanding of the program’s major target markets and trade ally and service channels throughout Energy Trust’s Washington territory, both for existing commercial/public buildings as
well as for existing multifamily buildings. Discuss the strategies and methods respondent is proposing to use to deliver services to each specified target market and location. This section of respondent’s proposal must include a comprehensive description of how respondent will successfully deliver a balanced delivery strategy that is designed to help steer commercial customers toward the offering that best meets their needs.

Respondent must specifically describe how respondent’s proposed strategy, approach and solutions will achieve 2021 and 2022 Washington working savings targets for NW Natural.

The preliminary 2021 first-year annual savings targets identified in Table 5 below were developed as part of Energy Trust’s 2020-2021 budget cycle. The 2021 budget and savings goals will be updated during Energy Trust’s 2021-2022 budget cycle and will be influenced, among other things, by the outcome of this RFP process.

<table>
<thead>
<tr>
<th>2021 Washington Commercial Program Goals</th>
<th>Working Savings Target</th>
<th>Incentive Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>NW Natural</td>
<td>127,032 therms</td>
<td>$415,323</td>
</tr>
</tbody>
</table>

Respondent must clearly tie the elements described in the written proposal narrative to respondent’s Pricing and Savings Proposal. Reference Appendix J: Commercial Buildings—Southwest Washington Measure Build-Up to complete the measure-specific buildup for the savings and incentives that are included in the Pricing and Savings Proposal.

3. **Diversity, Equity and Inclusion**
Clearly explain how respondent’s proposed program strategies will help the program achieve DEI goals.

4. **Coordination/Collaboration**
Specifically address respondent’s coordination and collaboration plan to address the needs outlined in Appendix F: Coordination and Collaboration.

5. **Program Enhancements (Optional)**
Identify any proposed program enhancements.

D. **New Customer Strategies and Opportunity Areas**
Market-ready approaches and technologies that are new to Energy Trust and have been proven outside of Energy Trust’s service territory should NOT be included here; rather those should be included in the applicable Program Enhancements sections of the proposal as indicated above.

1. **Team (1 page)**
Detail respondent team’s capabilities and any key partnerships for managing and delivering the New Customer Strategies and Opportunity Areas services. Include:
• An organizational chart identifying the expected management structure of the team. Include any proposed subcontractors that would deliver portions of the program services, clearly indicating their roles and responsibilities.
• Outline the hierarchical distribution of labor across the team; provide both a description and a graphic to show how all program components and team members will work together to achieve the program objectives and identify key point(s) of contact with Energy Trust.
• Identify all key personnel, along with position title, primary responsibilities, and expected full-time equivalent (FTE) designation for each title. Detail the location of the identified personnel, delineating Portland-based staff and staff that are or would be located in home or field offices outside of the Portland metropolitan area.

Respondent will provide additional supporting information about its team members in its Part 7: Qualifications portion of the response.

2. Strategy and Delivery Model
Describe respondent’s strategy for each identified New Customer Strategy and Opportunity Area. Clearly indicate costs for development and implementation, impacts for program participation, and how it will support acquisition of cost-effective savings by the third year of program implementation.

Describe how respondent’s strategy will result in long-term, cost-effective savings. Provide details of anticipated savings in future years, measure level cost effectiveness analysis if applicable, and ongoing costs to deliver the offering.

Energy Trust is interested in respondent’s methodology, approach and experience developing outreach strategies and pilots that are targeted, evaluable, scalable and impactful. Describe respondent’s development approach, addressing:

• How respondent ensures that proposed strategies and pilots target and measure results accurately. What are key strategies (e.g., supporting tools, methods, general approaches) that allow for future energy savings quantification and sufficient data to interpret the potential impacts of the approach and subsequent future program offerings? What is respondent’s experience quantifying non-energy benefits?
• How does respondent inform and relate its outreach approaches and pilot designs to a specific community? Provide examples of respondent’s experience using a DEI lens and how respondent identifies the manner in which a developed strategy or pilot may affect customer perceptions or satisfaction. How has respondent implemented plans to account for these challenges and the customer experience?

3. Diversity, Equity and Inclusion
Clearly explain how respondent’s proposed strategies and approaches will help the program achieve DEI goals.
4. Coordination/Collaboration
Specifically address respondent’s coordination and collaboration plan to address the needs outlined in Appendix F: Coordination and Collaboration.

Part 3: Program Delivery Contractor (PDC) Services (15 pages)

A. Business Lighting Program Design

1. Team
Detail respondent team’s capabilities and any key partnerships for managing and delivering the Business Lighting services. Include:

- An organizational chart identifying the expected management structure of the team. Include any proposed subcontractors that would deliver portions of the program services, clearly indicating their roles and responsibilities.
- Outline the hierarchical distribution of labor across the team; provide both a description and a graphic to show how all program components and team members will work together to achieve the program objectives and identify key point(s) of contact with Energy Trust.
- Identify all key personnel, along with position title, primary responsibilities, and expected full-time equivalent (FTE) designation for each title. Detail the location of the identified personnel, delineating Portland-based staff and staff that are or would be located in home or field offices outside of the Portland metropolitan area.

Respondent will provide additional supporting information about its team members in its Part 7: Qualifications portion of the response.

2. Program Design and Management
Respondent should demonstrate how it will deliver the program to all relevant existing buildings, multifamily and industrial customers with lighting throughout Energy Trust’s territory. Appendix E: Business Lighting and other relevant Appendices should inform this proposal.

Proposal must clearly identify major target markets, trade ally and service channels and strategies and methods to deliver services to each specified target market.

The proposal must specifically outline how respondent’s approach will achieve 2021 and 2022 Oregon utility-specific working savings targets.

The 2021 first-year annual savings targets identified in Table 6 below were developed in Energy Trust’s 2020-2021 budget cycle. The 2021 budget and savings goals will be updated during Energy Trust’s 2021-2022 budget cycle and will be influenced by the outcome of this RFP process. Savings projections for 2022 have not been developed; respondent will propose 2021 and 2022 energy savings targets in the response.
Table 6. 2021 Preliminary Savings Goals and Incentive Budget – Business Lighting

<table>
<thead>
<tr>
<th>Utility</th>
<th>Program</th>
<th>Working Savings Target</th>
<th>Incentive Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portland General Electric</td>
<td>Commercial – EB</td>
<td>25,465,625 kWh</td>
<td>$3,597,530</td>
</tr>
<tr>
<td></td>
<td>Commercial – MF</td>
<td>2,882,812 kWh</td>
<td>$325,297</td>
</tr>
<tr>
<td></td>
<td>Industrial</td>
<td>24,650,000 kWh</td>
<td>$4,861,700</td>
</tr>
<tr>
<td>Pacific Power</td>
<td>Commercial – EB</td>
<td>14,505,000 kWh</td>
<td>$2,031,357</td>
</tr>
<tr>
<td></td>
<td>Commercial - MF</td>
<td>883,931 kWh</td>
<td>$108,419</td>
</tr>
<tr>
<td></td>
<td>Industrial</td>
<td>15,350,000 kWh</td>
<td>$2,927,300</td>
</tr>
</tbody>
</table>

NOTES: EB = Existing Buildings. MF = Multifamily.

Proposal must include a clear description of the savings that will be delivered as well as the incentives that will be necessary to drive these savings. These elements in the written proposal should tie clearly to respondent’s Pricing and Savings Proposal.

Respondent must clearly tie the elements described in the written proposal narrative to respondent’s Pricing and Savings Proposal, and should reference Appendix K: Business Lighting Measure Build-Up to complete the measure-specific buildup for the savings and incentives that are included in the Pricing and Savings Proposal.

3. Diversity, Equity and Inclusion
Clearly explain how respondent’s proposed program strategies will help the program achieve DEI goals.

4. Coordination/Collaboration
Specifically address respondent’s coordination and collaboration plan to address the needs outlined in Appendix F: Coordination and Collaboration.

5. Program Enhancements (Optional)
Identify any proposed program enhancements. For the purposes of this RFP, midstream lighting is a core program component and should not be considered an enhancement.

B. New Customer Strategies and Opportunity Areas – Business Lighting

Market-ready lighting approaches and lighting technologies that are new to Energy Trust and have been proven outside of Energy Trust’s service territory should NOT be included here; rather those should be included in the Program Enhancement section of the proposal as indicated above. For the purposes of this RFP, development of a midstream delivery structure should be considered a core program offering rather than a new customer strategy or opportunity area.

1. Team
Detail respondent team’s capabilities and any key partnerships for managing and delivering the New Customer Strategies and Opportunity Areas – Business Lighting services. Include:
• An organizational chart identifying the expected management structure of the team. Include any proposed subcontractors that would deliver portions of the program services, clearly indicating their roles and responsibilities.

• Outline the hierarchical distribution of labor across the team; provide both a description and a graphic to show how all program components and team members will work together to achieve the program objectives and identify key point(s) of contact with Energy Trust.

• Identify all key personnel, along with position title, primary responsibilities, and expected full-time equivalent (FTE) designation for each title. Detail the location of the identified personnel, delineating Portland-based staff and staff that are or would be located in home or field offices outside of the Portland metropolitan area.

Respondent will provide additional supporting information about its team members in its Part 7: Qualifications portion of the response.

2. Strategy and Delivery Model
Describe respondent’s strategy for each identified New Customer Strategy and Opportunity Area for Business Lighting. Clearly indicate costs for development and implementation, impacts for program participation, and how it will support acquisition of cost-effective savings by the third year of program implementation.

Describe how respondent’s strategy will result in long-term, cost-effective savings. Provide details of anticipated savings in future years, measure level cost effectiveness analysis if applicable, and ongoing costs to deliver the offering.

Energy Trust is interested in respondent’s methodology, approach and experience developing outreach strategies and pilots that are targeted, evaluable, scalable and impactful. Describe respondent’s development approach, addressing:

• How respondent ensures that proposed strategies and pilots target and measure results accurately. What are key strategies (e.g., supporting tools, methods, general approaches) that allow for future energy savings quantification and sufficient data to interpret the potential impacts of the approach and subsequent future program offerings? What is respondent’s experience quantifying non-energy benefits?

• How does respondent inform and relate its outreach approaches and pilot designs to a specific community? Provide examples of respondent’s experience using a DEI lens and how respondent identifies the manner in which a developed strategy or pilot may affect customer perceptions or satisfaction. How has respondent implemented plans to account for these challenges and the customer experience?

3. Diversity, Equity and Inclusion
Clearly explain how respondent’s proposed strategies and approaches will help the program achieve DEI goals.
4. Coordination/Collaboration
Specifically address respondent’s coordination and collaboration plan to address the needs outlined in Appendix F: Coordination and Collaboration.

Part 4: Program Implementation (PMC and PDC) Services (25 page maximum)

Describe respondent's plan for delivering the following program management and delivery services for the Option proposed. Where applicable to Option 2 (PDC only), the information provided in this section would be Business Lighting-program specific. Where applicable to Option 1 or 3 (PMC), the information provided in this section must additionally address certain Strategic Energy Management-specific program implementation services as described in Appendix B: Energy Performance Management.

A. Budget and Savings Goals Development
Demonstrate respondent team’s capability to establish and manage a comprehensive portfolio-wide budget for an efficiency program of similar size or scope that achieves annual savings goals, within program incentive and delivery budgets, with minimal variance between budgeted and realized expenditures.

B. Forecasting and Pipeline Management
Demonstrate experience with current and future-years forecasting and project pipeline management, including accurately forecasting for efficiency programs of similar size and scope. Demonstrate respondent’s experience with scenario forecasting of market potential and expected uptake for energy-saving technologies across all market channels. Provide examples of how respondent has previously identified and mitigated an underperforming metric within the portfolio.

C. Energy Engineering, Analysis and Technical Support
Demonstrate experience with managing a team of energy-efficiency engineers and analysts performing tasks including but not limited to energy modeling, custom measure energy analysis, pre and post project verifications, development and maintenance of energy savings calculators, and obtaining site access and performing walk-throughs. Include specific experience with multifamily common areas and in-unit access and walk-throughs. If Option 1 or 3, respondent must additionally address respondent's experience and expertise with technical coaching and M&V as described in Appendix B: Energy Performance Management.

Provide information about how respondent’s team would perform energy engineering, project analysis and technical support, as further detailed in this RFP, including all relevant Appendices, for the Option of program services for which respondent is bidding.
D. Measure Development and Evaluation Support

Demonstrate experience and, if possible, provide examples of energy-efficiency program measure development and evaluation support performed. Specifically address whether measure development experience includes use of a technical resource manual, and if so, whether respondent developed the manual content. For measure development experiences not using a technical resource manual, describe experience developing and selecting measures to include in programs, including savings calculation methods and relevant research.

Describe how respondent will meet the Appendix G: Program Implementation requirements for measure development and evaluation support.

E. Trade Ally and Contractor Engagement

Demonstrate experience with a program of similar size and scope that has a network of trade allies and contractors. Appendix G: Program Implementation provides additional information and context around service level agreement expectations and delivery requirements. Respondent’s proposal must include a plan for comprehensively addressing, at a minimum but not limited to, the following components of trade ally engagement:

- Cultivate strategic and long-term relationships with the trade ally contractors applicable to the Option upon which respondent is bidding, and with other relevant trades and various trade associations.
- Provide examples of direct experience in managing, recruiting, training, developing and reviewing qualifications for trade allies who will engage with program and customers.
- Deliver regular communications, training and education, and program updates to trade allies, including timely and accurate information regarding promotions, program changes, incentive information, program and technical specification requirements, and provide content for Energy Trust newsletters and other outreach materials.
- Explain how respondent has and will leverage trade allies and contractors to drive program energy savings and to advance DEI goals to expand participation and reach diverse customers. Provide previous experience with recruiting diverse trade allies.
- Provide specific examples of trade and/or community-based organizations with which respondent has worked and how those engagements have supported the development of minority- and woman-owned trade allies.
- Develop an engagement strategy for working with businesses not currently enrolled in Energy Trust’s Trade Ally Network.
- If Option 1 or 3, trade ally management will include EPM’s Pay for Performance (PfP) ally pool as described in Appendix B: Energy Performance Management.

F. Marketing

1. Respondents Bidding on PMC Services (Option 1 or 3)

In this section, respondent bidding on PMC services (Option 1 or 3) will detail capabilities and approach to resource, plan, and execute annual program marketing activities or other key deliverables designed to drive adoption among customers of Existing Buildings and NW Natural Washington, including those within targeted vertical market sectors, and also with other
influencer audiences such as trade allies. This should include, but is not limited to, experience of marketing team members in design, writing and production of marketing materials, media buying, social media, event management, direct marketing and advertising. Respondent should also detail how the marketing team would acquire and apply market intelligence and/or data resources to inform and enhance marketing activities.

Energy Trust has a diverse customer base with customers engaging with different programs. In addition to implementing marketing activities for Existing Buildings and NW Natural Washington, PMC marketing must be a strong collaborator with Energy Trust and with Energy Trust’s other program implementers (PMCs and PDCs) to meet customer needs. Respondent should also address how the proposed marketing team would collaborate with and support other Energy Trust programs, such as Business Lighting, New Buildings, Production Efficiency, Residential and Solar.

Respondent may provide relevant marketing examples as an appendix, not to exceed a total of 10 pages.

2. Respondents Bidding on PDC Services (Option 2)
In this section, respondent bidding on PDC services (Option 2) will detail approach and experience working with a marketing team. See Appendix G: Program Implementation for details.

G. Outreach and Ongoing Project Support
Describe experience with and examples of how respondent provides outreach and ongoing project support across all commercial sectors. Provide specific examples of how respondent has successfully used its outreach team to generate more program energy savings with small/medium businesses, rural businesses, DEI and multifamily customers. Provide examples of how respondent has leveraged its outreach team to help inform customer outreach materials, marketing and new measure development. See Appendix G: Program Implementation for more details and different outreach approaches for PMC and PDC. If Option 1 or 3, additionally address respondent’s experience and expertise with Energy Performance Management (EPM) outreach and ongoing project support, as well as recruitment activities, as described in Appendix B: Energy Performance Management.

H. Customer Service
Energy Trust places a high value on the experience of customers seeking information about and participating in its programs. Use this section of the proposal to detail respondent’s customer engagement plan (See Appendix G: Program Implementation for more details on service level agreements and delivery expectations). Proposals should provide a cohesive and streamlined approach to helping all customer types navigate through and select appropriate Energy Trust offerings. This should take into account everything from initial contact through project identification and project completion, as well as reaching new participants or previously-dissatisfied customers. The plan must address, at minimum, how respondent will:

- Ensure an equitable experience and access to program resources for all customers, including non-English speakers.
- Participate in relevant commercial market events and representation of program offerings that create opportunities to reach new participants across the full territory and with all types of eligible customers.
- Dedicate support for email and more than 300 phone-based customer and ally inquiries per month with staff who triage incoming customer calls and support outbound calls related to the Existing Buildings and Multifamily customer inquiries, as well as transfers to other programs.
- Receive feedback from market actors and assist in resolving customer concerns and escalated complaints.
- Develop and implement tools and protocols to help customers understand their energy-efficiency potential and how to work with Energy Trust from the beginning of a project through completion.
- Adhere to Energy Trust’s customer service protocols, guidelines and customer service values and contribute to Energy Trust-led conversations about customer experience strategy and projects.
- Provide educational resources to help property managers, owners and tenants understand the benefits of energy-efficiency measures.
- Collaborate and coordinate with other relevant Energy Trust program teams (e.g., Lighting, Residential, Industrial) to best meet the needs of customers who cross over programs.
- Ensure subcontractors meet Energy Trust’s customer experience and delivery standards.

I. Reporting and Invoicing

Demonstrate adequate staffing and overall business capacity to support accurate and timely invoicing and reporting requirements. Propose an invoicing format that will track costs attributed to discrete tasks identified in this RFP and to subcontractors.

J. Operations and Controls

Use this section of the response to address respondent’s experience and demonstrated capabilities with operations and controls, including:

- Developing and maintaining calculator tools, forms and workbooks (e.g., Microsoft Excel, Word and custom calculation script formulas and programming).
- Managing forms and Excel workbook development and maintenance; specifically address respondent’s capabilities and experience with project management, developing requirements documentation and submission to developers, version control and deployment. Include a description of a current or past project on which respondent has worked for a complicated Excel workbook using Microsoft VBScript (Visual Basic Script) and optional XML output.
- Using DocuSign forms or similar online workflows, if applicable, for information-gathering and process management, including any web service integration.
• Creating fillable forms in either of the following formats: PDFs (Adobe Acrobat) or Adobe InDesign.
• Developing, maintaining and implementing a quality control plan.
• Conducting site visits and verification reviews for purposes of quality control, including coordinating with customers on scheduling, safety and site access requirements.
• Developing and complying with protocols for processing and delivering incentive payments.
• Developing and maintaining a program implementation manual that documents all procedures, protocols, forms, processes and policies regarding the program delivery, program management, quality control, customer service and compliance activities for a program.
• Project data entry and processing capabilities, system integrations, etc.

Demonstrate respondent’s ability to meet internal and external audit requirements and maintain records with standards outlined in Appendix G: Program Implementation. Samples of record-keeping procedures are required and may be included as an appendix to the proposal, which appendix will not count toward the page limit.

Provide examples of respondent’s quality control procedures and processes to ensure the accuracy of data entry and required program and project documentation. What challenges has respondent encountered and how has respondent overcome them? Describe respondent’s program implementation compliance audit results for a program similar in size and scope to the Energy Trust program services being bid as outlined in this RFP.

K. Information Technology

Demonstrate how respondent will comply with the Energy Trust IT requirements outlined in Appendix L: Information Technology Requirements. Proposals should clearly outline all expenses related to the IT implementation plan for the PMC/PDC services proposed. In addition to all the above, proposals should:

• Share documented approach to effective IT project management.
• Provide examples of successful IT development and integration projects.
• Include in professional references at least one person who directly worked with the respondent on a prior IT integration project.
• Describe standard data retention and data destruction protocols.
• Describe security protections governing any client data input into its systems.
• Describe approach to monitoring of information security in respondent’s environment.
• List all industry certifications for IT security, including but not limited to SOC 2 and ISO 27001/27002 compliance or certification.
• List date and high-level results of most recent independent information security assessment.
• Provide a plan that clearly outlines resources needed to integrate into Energy Trust systems (i.e., CRM and Project Tracker) if that is being proposed.
L. SEM Delivery (PMC only)

Use this section of the response to address respondent’s experience and demonstrated capabilities with SEM Delivery as described in Appendix B: Energy Performance Management, including Workshop Delivery and customer Support and Curriculum Development. Specifically address how respondent:

- Keeps up-to-date with new strategies and techniques for leadership, engagement, adult learning and change management and other facilitation techniques to foster continuous improvement and encourages optimal learning and action;
- Builds relationships, gauges progress, and helps motivate action with energy savings projects;
- Leverages relationships and learning about customer business and dynamics and applying program knowledge to help customers develop prioritized and complete energy plans;
- Approaches the development of workshop contents so that it would appropriately address both the needs of the customer and Energy Trust as the client, while leveraging existing content and historically successful strategies; and
- Ensures that its SEM coaching personnel are up-to-date and informed on programmatic requirements.

Part 5: Implementation Plans and Schedules (Option 1, 20 page maximum; Option 2, 15 page maximum; Option 3, 35 page maximum)

Energy Trust expects the selected PMC and/or PDC to begin full program implementation as of January 1, 2021. To allow for a smooth implementation transition, Energy Trust would anticipate overlap of the selected PMC and/or PDC with the existing two PMCs and PDC beginning no later than September 1, 2020. Activities contemplated beyond December 31, 2020 must be accounted for in respondent’s implementation plan and associated 2021/2022 Pricing and Savings Proposal budgets.

During the transition overlap period, the new PMC and/or PDC will be responsible for learning day-to-day program operations and for developing and finalizing any new program changes to be implemented at the end of the transition period. See Appendix H: Transition for additional details.

A. Transition Plan

This portion of respondent’s proposal must clearly outline respondent’s proposed transition plan, relevant to the Option(s) bid, that would seamlessly facilitate the transition of the specified program services and maintain momentum. The incoming PMC and/or PDC will coordinate and work closely together to manage and support the transition from the current PMCs and PDC so that transition activities result in minimal disruption to customers and trade allies.
For Options 1 and 3, use tabs to separate and identify the specific transition plan for each of the following:

- Existing Buildings (including Multifamily) Program Design
- EPM Program Design
- Commercial Buildings Program Design – Southwest Washington
- New Customer Strategies and Opportunity Areas

For Option 2, use tabs to separate and identify the specific transition plan for each of the following:

- Business Lighting
- New Customer Strategies and Opportunity Areas – Business Lighting

Each transition plan must include a set of transition activities and tasks to implement an efficient and coordinated transition of the PMC’s and/or PDC’s proposed work, and to develop any new offering/enhancement that is time-sensitive for January 1, 2021 launch (for example, lighting midstream delivery channel). Address key activities to complete each task, how the task will be accomplished, and the anticipated outcomes or deliverables. Review the relevant Appendices describing the PMC and/or PDC services and the specific Appendix H: Transition to inform transition activities.

Address respondent team capabilities and any key partnerships that will enable successful transition. Identify key personnel, along with position titles, that would be responsible for performing the specific transition activities. Address how such key team members’ experience relates to the specific transition activity identified. Respondent should include additional information about the transition team members, as well as respondent’s direct experience with implementing other program transitions of like scale and scope, in the Part 7: Qualifications portion of the response.

**B. Transition Schedule (1 page; may be oversized)**

Provide a summary schedule of all identified transition activities associated with respondent’s proposed transition plans and Pricing and Savings Proposal transition budget. Provide the transition schedule in the form of a Gantt chart (categorized by specific transition plan) of month-by-month identified activities/tasks, with an anticipated transition start date of no later than September 1, 2020 and a completion date of December 31, 2020.

**C. Implementation Plans**

This portion of respondent’s proposal should address the program elements identified for the Option(s) bid and reflect how respondent will perform the specified program management and delivery services to effectively implement and manage energy-savings goals, and deliver the activities on which it is bidding (Option 1, 2 or 3), if selected. For Options 1 and 3, use tabs to separate and identify the specific implementation plan for each of the following:

- Existing Buildings (including Multifamily)
• Energy Performance Management
• Commercial Buildings Program Design – Southwest Washington
• New Customer Strategies and Opportunity Areas

For Option 2, use tabs to separate and identify the specific implementation plan for each of the following:

• Business Lighting
• New Customer Strategies and Opportunity Areas – Business Lighting

Each implementation plan must include a set of activities and tasks to implement the proposed PMC/PDC work. Identify key activities to complete each task and the anticipated outcomes or deliverables. While Energy Trust does not expect a fully-detailed and comprehensive implementation plan at this point, the proposal will be evaluated with consideration of its degree of clarity and attention to the program components and details articulated in this RFP.

D. Implementation Schedule (2 pages; may be oversized)
Provide best estimates of the amount of time necessary to implement the program activities included in respondent’s submitted proposal and implementation plans. Clearly distinguish scheduled activities by implementation plan as described in Part 5.C above. Include a schedule item for each significant program development and implementation activity identified in respondent’s submitted implementation plan.

Provide the implementation schedule (categorized by implementation plan) in the form of a two-year, month-by-month schedule in the form of a Gantt chart.

Part 6: Pricing and Savings Proposal (4 page maximum, plus completed templates)

Energy Trust currently budgets annually and tracks and reports expenses and energy savings for Portland General Electric, Pacific Power, NW Natural, NW Natural (Schedule 360 Demand Side Management), Cascade Natural Gas and Avista utility service territories in Oregon, as well as NW Natural’s service territory in Washington.

Each Option requires separate pricing as a stand-alone, independent bid, with all tabs and worksheets provided. In addition to the submitted Pricing and Savings Proposal, respondent must provide (in no more than four pages) a narrative explaining the assumptions for the proposed Pricing and Savings Proposal(s). Any proposal that doesn’t include complete information or use the format as directed by Energy Trust will be considered unresponsive.

For Option 1, use the Appendix N: PMC Pricing and Savings Template according to the instructions included in the template to prepare a Pricing and Savings Proposal for the PMC services.
For Option 2, use the Appendix O: PDC Pricing and Savings Template according to the instructions included in the template to prepare a Pricing and Savings Proposal for the PDC services.

For Option 3, use the Appendix N: PMC Pricing and Savings Template and Appendix O: PDC Pricing and Savings Template templates according to the instructions included in each template to prepare two Pricing and Savings Proposals. These should clearly delineate how each respective Pricing and Savings Proposal would be structured in the event only a subset of services were awarded (for example, selected for only Option 1: PMC services or Option 2: PDC services, but not for both). Activate and use the Option 3 discount columns in each Pricing and Savings Proposal to identify any efficiencies and cost savings that could be achieved through contracting both the PMC and PDC services with a single entity. Address the identified additional benefits in the accompanying narrative.

Respondent will use the Appendix N: PMC Pricing and Savings Template and Appendix O: PDC Pricing and Savings Template templates to develop a measure savings and incentives summary at the track level (e.g., Standard, Custom, EPM) as indicated in the applicable savings tab. While the information will be rolled up into a high-level summary for Pricing and Savings Proposal submittal purposes, respondent must additionally submit, as a proposal appendix, its completed Appendix N: PMC Pricing and Savings Template and/or Appendix O: PDC Pricing and Savings Template as well as any additional supporting documentation used to develop the summary, including measure type, savings and incentives per measure (kWh/therms), cost per unit for prescriptive and direct install, and total measures assumed.

Part 7: Qualifications (12 page maximum, excluding appended items)

A. Project Team Qualifications and Experience

Proposals should describe respondent’s experience in successfully developing and implementing comparable energy-efficiency programs and demonstrate how the respondent is capable of effectively meeting Energy Trust’s goals as indicated in this RFP to accomplish the program services it is proposing (Option 1, 2 or 3). Subcontracting to provide expertise for specific program management tasks, such as outreach and delivery to specific market segments, is encouraged and the successful respondent will demonstrate how it will work cohesively and efficiently with subcontractors to perform various aspects of program administration.

Respondents bidding on Option 3: PMC and PDC services should treat each section independently, stating how the project team would be structured in the event Energy Trust awards the respondent only a subset of services. Respondents bidding on Option 3 are welcome to provide additional detail outlining efficiencies or benefits that may occur if Energy Trust were to select respondent to provide a combination of PMC and PDC services.
Energy Trust values a stable program team with consistency in key contacts. The submitted proposal(s) should describe how the respondent’s project team and personnel functions would be integrated to actively manage all tasks and responsibilities identified in the proposal, including but not limited to:

- Program management (e.g., manage budgets, contract requirements, invoicing, PMC and/or PDC staff)
- Program design and development
- Program administration (e.g., data entry, reporting, data analysis, invoicing, record-keeping, development of new and revised program forms)
- Customer service (e.g., customer engagement strategy and relationship management)
- Program planning and design (e.g., measure development, savings analysis)
- Program evaluation support
- Program IT (e.g., developers, systems analysts, IT project managers, desktop support, infrastructure support)
- Program quality control and compliance (e.g., how it will be handled)
- Program delivery (e.g., field staff)
- Program technical analysis and support (e.g., studies, modeling and workshop facilitation)
- Program marketing and marketing materials (e.g., collateral, case studies, website)
- Program outreach (e.g., speaking engagements, training, trade shows)
- Program management of trade allies and other key program relationships
- SEM program delivery (if Option 1 or 3)

Provide a diagram and description of the organizational relationships of respondent’s team performing specific tasks and activities (including subcontractors), including relevant experience, tenure and geographic locations of respondent’s designated lead program manager and other key personnel. Respondent may include resumes of key personnel as appendices. Any included 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.

If a respondent’s team includes subcontractors to develop and/or implement components of PMC services and/or PDC services, the proposal should describe the assurance of such support and the experience of subcontractors in designing, developing and implementing similar programs. Proposals should 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. If a respondent is not currently located in Oregon, respondent should include a staffing plan, including timing, for how the respondent would build and deliver services in Oregon.

**B. Diversity, Equity and Inclusion Qualifications and Experience (8 pages, excluding appended items)**
1. **DEI Hiring Practices and Policies**

Energy Trust seeks to contract with organizations that share its commitment to building a diverse, equitable and inclusive workplace and business environment. Respondent should describe its specific experience developing and executing DEI initiatives and/or policies within its company, including the following:

   a. Provide a copy of respondent’s most recent EEO-1 report.
   b. Specify number of women and minority employees identified on respondent’s EEO-1 report that are included in respondent’s team and would be performing the services described in the proposal (Option 1, 2 or 3).
      i. % in managerial roles
      ii. % in senior program or department leads
   c. Specify number of employees or independent contractors of respondent firm that are located outside of the Portland metro area and are capable of delivering program outreach and services in Energy Trust’s rural geographic territories, especially eastern and southern Oregon.
   d. Provide specific examples of activities, projects or plans worked or developed during the last 36 months that demonstrate how respondent promoted DEI within respondent company in the areas of recruitment, hiring, retention and promotion, training and professional development.
   e. Specifically describe any internal initiatives or policies developed and implemented during the last 36 months that demonstrate how respondent promotes and supports DEI within and throughout respondent company operations and strategy.
   f. Provide information regarding state or federal certifications, awards or recognition for respondent’s organizational policies and practices relating to DEI.

2. **DEI Program Design and Delivery Experience**

Energy Trust seeks program implementers who apply a diversity and equity lens to their work in designing, implementing and delivering the energy-efficiency program scopes as outlined in this RFP to ensure that programs are designed, implemented and delivered to reach all customers, including those not previously served, and to track results of such programs. Respondent should describe its experience in designing, implementing and tracking programs intentionally focused on reaching underserved customers in diverse, rural and low-income communities:

   a. Describe program strategies that respondent has implemented for other energy-efficiency programs that expanded program participation to underserved customers.
   b. Give examples of specific activities or strategies used by respondent to increase the participation of small- to medium-sized, rural, and minority- and woman-owned businesses in an implemented program.
   c. Provide specific examples of how respondent has collected, analyzed and reported disaggregated market, customer and participant demographic and firmographic data to baseline, benchmark and track participation of small- to medium-sized, rural, and minority- and woman-owned business customers.
3. Experience in Subcontracting with Diverse Firms and Associations

Energy Trust seeks program implementers who share its commitment to advancing opportunities for diverse companies to become experienced and valued service providers in the energy-efficiency industry. Respondent should describe its specific experience in subcontracting with minority-owned and woman-owned businesses, emerging small businesses, service-disabled veteran businesses, and nonprofit community-based organizations.

a. State whether respondent has an existing supplier diversity program. If so, describe efforts respondent has made to increase business with woman-, minority- and service disabled veteran-owned businesses (i.e., does respondent company have a policy statement, participate in outreach activities, promote diverse firm subcontracting, publicize contract opportunities, provide certification assistance, etc.?) Please provide examples. If respondent does not have an existing supplier diversity program, explain why not.

b. Describe any experience respondent has in engaging with community-based organizations for program outreach or other services.

c. Whether or not respondent has a formal supplier diversity program, describe the way in which respondent has integrated small businesses and woman-, minority- and service disabled veteran-owned businesses, and community based organizations, into operations and program management, delivery and implementation (i.e., are they incorporated into trainings, strategy sessions, and other significant organizational discussions?).

d. Does respondent mentor women, minority and service-disabled veteran-owned subcontractors? Please provide examples.

e. Describe respondent’s system for tracking and reporting on the diversity of its subcontractors.

f. What percentage of respondent’s total contracting and procurement spend for the prior year was with woman-, minority- and service-disabled veteran-owned businesses? If respondent is unable to provide this information, describe the systems and plans respondent will have in place to provide these data if selected as the successful respondent on this RFP.

g. Describe respondent’s existing relationships with ethnic business communities and business organizations in Energy Trust’s service territory.

C. References

Provide a minimum of three references, including name, title, address, telephone number and email, for parties knowledgeable about respondent’s energy-efficiency program implementation services. Energy Trust encourages respondents to additionally provide an IT reference to illustrate their capabilities in integration and adoption of IT systems and their IT security. Energy Trust may request additional references reflecting specific implementation services. Identify any relevant existing energy-efficiency programs respondent has developed and/or operated.
D. Required Licenses and Certifications

In no more than one page, respondent should disclose whether any of the work proposed for the Option(s) it is bidding would require any state- or federally-approved license or professional certification and/or any third-party license or professional certification.

If respondent or any of its team members do not have the required licenses or professional certifications, respondent should specify plans for obtaining any necessary licenses and professional certifications or explain why such licenses or professional certifications would not be needed.

Potential license or professional certification requirements include, but are not limited to, licenses or certifications from:

- Oregon Construction Contractors Board;
- Oregon State Board of Architect Examiners;
- Oregon State Board of Examiners for Engineering & Land Surveying;
- Oregon Building Codes Division;
- Oregon Department of Education;
- Oregon Department of Consumer and Business Services; and/or
- Washington State Department of Labor & Industries.

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Part 8: Administrative (7 page maximum, excluding appended items)

A. 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 respondent or 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 in which it 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 should explicitly so state. The determination of whether a conflict of interest exists is left to Energy Trust at its sole discretion.

B. Insurance

Proposals should include all insurance information (excluding appended items) in two pages or fewer. Additional information may be appended if needed. Energy Trust requires all PMCs to maintain workers’ compensation insurance including employer’s liability coverage (OR and WA), 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. A PMC’s professional liability with errors and omissions coverage needs to specifically cover the professional services performed for Energy Trust.

Proposals should include a complete description of respondent’s insurance coverage for performing 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; and
- All limits, including aggregate limits and the current remaining coverage amounts under those limits.

C. Financial Package

Proposals should include a financial statement package of no more than two pages (excluding appended items) including, at a 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’s 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);
- 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;
- 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.

**Part 9: DEI Subcontracting Plan (8 page maximum)**

Energy Trust is interested in engaging an increasingly diverse population of customers, contractors, employees and beneficiaries of the services that will be provided in connection with this RFP. Energy Trust seeks to build a diverse and prosperous group of community contractors and trained personnel who can effectively compete in business, while obtaining quality goods and services in a competitive, efficient and non-discriminatory manner.

For **Part 9: DEI Subcontracting Plan** of this proposal, described herein, respondent shall submit a written DEI Subcontracting Plan in accordance with the template provided as **Appendix P: DEI Subcontracting Plan Template**, which specifies how respondent would, as prime contractor, contribute to achievement of Energy Trust’s DEI goals of contracting with diverse subcontractors during the initial three-year contract term.

Respondent’s submitted **Part 9, DEI Subcontracting Plan** must detail its proposed plan for PMC and/or PDC DEI subcontractor utilization for the services outlined in this RFP during the contract term. For DEI Subcontracting Plan development purposes, a “DEI Subcontractor” is defined as:

• Businesses meeting the definitions established under State law in ORS Chapter 200 for the following categories, and either certified by, or having filed an application for certification with, Oregon’s Certification Office for Business Inclusion and Diversity (COBID):
  o Minority-owned businesses (MBE),
  o Woman-owned businesses (WBE),
  o Emerging small businesses (ESB), and
  o Service-disabled veteran-owned businesses (SDV)
• Community-based organizations (CBOs) meeting the following Energy Trust definition: CBOs are public or private nonprofits representative of a community or significant segments of a community sharing similar needs, challenges or goals. A CBO may represent a specific geographic region, such as an isolated rural area, or a group with a shared goal, such as building a sustainable community. CBOs often represent disadvantaged groups and promote equal access to resources for members of their community.

Respondent must include its COBID certification number or a copy of its COBID application in order to be eligible for credit in their **Appendix P: DEI Subcontracting Plan Template**.
The term “subcontractor” for the purpose of the DEI Subcontracting Plan means a respondent subcontractor team member that would be performing a portion of the contracted services that respondent would be responsible for delivering to Energy Trust as PMC or PDC. Energy Trust aspires to use Oregon resident subcontractors to meet the DEI goals. “Oregon resident DEI subcontractor” refers to a business that regularly maintains a place from which business is physically conducted in Oregon for at least one year prior to this RFP or is a new business that is domiciled in Oregon and which regularly maintains a place from which business is physically conducted in Oregon.

The successful respondent(s) will further agree to implementation of their DEI Subcontracting Plan as part of their contract with Energy Trust. Such plan and implementation efforts will be measured in evaluating respondent’s proposal and as a criterion for evaluating any potential extension beyond the initial three-year term. The successful respondent will be required to designate a responsible individual for administering the plan and provide regular reporting on its spend under the contract with its DEI Subcontracting Plan subcontractors performing services during reporting periods and in a format as specified by Energy Trust.
3. Proposal Submittal Process

3.1 Intent to Respond / Interest in Teaming

If a firm is interested in submitting a proposal as a potential prime energy-efficiency program implementation contractor (PMC or PDC), it must submit an Appendix R: Intent to Respond/Interest in Teaming Form to Energy Trust by the deadline indicated. This form must be received by Energy Trust no later than the date and time shown in Section 1.1: RFP Schedule and should be delivered via email to:

CommercialSolicitations@energytrust.org

The email should include in the subject line a reference to this RFP, as well as the Option(s) on which respondent intends to bid, if identified (e.g., Intent to Respond - Option 1 Business Programs RFP). Confirmation of receipt will be sent via reply email within one business day.

If a firm is interested in potentially teaming with others on this work and would like Energy Trust to post contact information on the Energy Trust website indicating that interest, expressly indicate that on the submitted Appendix R: Intent to Respond/Interest in Teaming Form.

Energy Trust will only post on the Energy Trust website those respondents that expressly indicate on the submitted form that they are interested in teaming.

3.2 Energy Trust Informational Pre-bid Webinar

Energy Trust invites all potential respondents to attend a two-hour informational pre-bid webinar. This session will provide potential respondents with additional information about Energy Trust, its structure, the programs that are the subject of this RFP, roles and responsibilities, and interactions and coordination across Energy Trust and its program management and delivery contractor teams. The presentation will be conducted via webinar and participation is highly encouraged. All attendees will be expected to identify themselves.

- Register by emailing CommercialSolicitations@energytrust.org
- Pre-bid Webinar, March 12, 2020 at 10 a.m. PPT

3.3 Questions and Requests for Clarification

Any questions and/or requests for clarification or additional information regarding this RFP, including any questions that may arise during the informational pre-bid webinar, should be submitted via email and received by Energy Trust by the date and time listed in 1.1 RFP Schedule to CommercialSolicitations@energytrust.org.

These emails should include a subject line stating Request for Clarification - Business Programs RFP. Confirmation of receipt will be sent via reply email within one business day.
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 respondents and will not respond to additional requests for information after the date listed in the schedule.

### 3.4 Proposal Submittal and Method of Delivery

Proposals should be clear, complete and concise. Pages must be numbered, with sections clearly titled, with font no smaller than 11-point. For hard copy submissions, include labeled tabs for each section. Energy Trust requests that proposals be printed double-sided on 8.5-inch by 11-inch recycled paper and packaged without spiral bindings or non-recyclable binders/folders.

Respondents should submit ten (10) hard copies and one electronic copy of the complete proposal. The electronic copy can be submitted as a PDF or a secure Word file. One submitted hard copy must contain original signature on the required Appendix Q: Representations and Signature Page. Respondents may deliver their proposal to Energy Trust by hand, U.S. mail or courier service to its agent at the address listed below. Faxed submittals will not be accepted.

Submit electronic copy via email to CommercialSolicitations@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 (e.g., Option 1 Proposal - Business Programs RFP).

Submit hard copy proposals to:

Energy Trust of Oregon  
Attn: Business Programs RFP  
421 SW Oak St, Suite 300  
Portland, OR 97204

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

Energy Trust will accept proposals no later than the date and time indicated in Section 1.1: RFP Schedule. Energy Trust will not be obligated to consider information received after this deadline.

### 3.5 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.
3.6 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 that submitted an Appendix R: Intent to Respond. Potential respondents should contact Energy Trust if any inconsistencies or ambiguities are found in the RFP. Clarifications given by Energy Trust may become an addendum to the RFP.

3.7 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.
4. Proposal Evaluation Process and Criteria

This section explains how Energy Trust will evaluate proposals, including descriptions of the evaluation stages and scoring criteria for proposals.

4.1 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 (prime) respondent did not return an Intent to Respond/Interest in Teaming 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.

4.2 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 4.3: Scoring Criteria below. Interviews may be scheduled with the short-list 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.
4.3 Scoring Criteria

The following selection criteria, and any other criteria that Energy Trust deems, in its sole discretion, to be relevant, will be used to rank and select proposals. The criteria below will be applied to proposals that are chosen for interviews.

Table 7. Scoring Criteria for Proposal Ranking and Selection *(continued on next page)*

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Weight</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost and Energy Savings</td>
<td>40%</td>
<td>• Budget aligned with proposal tasks</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Adequate FTE allocation for management and implementation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Energy savings goals achievable and appropriate</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Competitive labor rates and subcontractor costs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Competitive other direct costs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Competitive and reasonable transition costs</td>
</tr>
<tr>
<td>DEI</td>
<td>25%</td>
<td><strong>DEI Qualifications</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Demonstrated experience and success in respondent firm’s hiring practices, policies and experience, and proposed team</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>DEI Program Design and Implementation Strategy</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Demonstrated experience and success in organizational DEI program design and implementation is embedded within the overall program strategy</td>
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<tr>
<td></td>
<td></td>
<td><strong>DEI Subcontracting Plan</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Demonstrated experience and ability to (i) implement the submitted DEI Subcontracting Plan, (ii) deliver on the DEI subcontracting goals, and (iii) successfully utilize DEI team member contractor skills and experience to achieve specific program strategies identified in the proposal to reach customers and achieve savings</td>
</tr>
</tbody>
</table>
Table 7. Scoring Criteria for Proposal Ranking and Selection *(continued from previous page)*

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Weight</th>
<th>Description</th>
</tr>
</thead>
</table>
| Strength of Proposal                          | 20%    | **Program Management Contractor (PMC) Services (Options 1 and 3)**  
  • Demonstrated experience and success in Existing Buildings (including Multifamily) Program Strategy, Design, Management and Delivery, including Coordination/Collaboration  
    o Strength of Program Enhancements (if included)  
  • Demonstrated experience and success in EPM Program Strategy, Design, Management and Delivery, including Coordination/Collaboration  
    o Strength of Program Enhancements (if included)  
  • Demonstrated experience and success in Commercial Buildings—Southwest Washington Program Strategy, Design, Management and Delivery, including Coordination/Collaboration  
    o Strength of Program Enhancements (if included)  
  • Demonstrated experience and success in New Customer Strategies and Opportunity Areas Program Strategy, Design, Management and Delivery, including Coordination/Collaboration  
    • Demonstrated experience and abilities in:  
      o Budget and Savings Goals Development  
      o Forecasting and Pipeline Management  
      o Energy Engineering, Analysis and Technical Support  
      o Measure Development and Evaluation Support  
      o Trade Ally and Contractor Engagement  
      o Marketing  
      o Outreach and Ongoing Project Support  
        ▪ SEM Recruitment  
      o Customer Service and Call Center  
      o Reporting and Invoicing Capabilities  
      o Operations and Controls  
      o Information Technology  
      o SEM Delivery  
        ▪ SEM Workshop Development and Customer Service  
        ▪ SEM Curriculum and Workshop Development  
      o Transition Plans/Schedule  
      o Implementation Plans/Schedule |
<table>
<thead>
<tr>
<th><strong>Program Delivery Contractor (PDC) Services (Options 2 and 3)</strong></th>
<th></th>
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</thead>
</table>
| • Demonstrated experience and success in Business Lighting Program Strategy, Design, Management and Delivery, including Coordination/Collaboration  
  o Strength of proposed Program Enhancements (if included)  |
| • Demonstrated experience and success in New Customer Strategies and Opportunity Areas—Business Lighting Program Strategy, Design, Management and Delivery, including Coordination/Collaboration  |
| • Demonstrated experience and abilities in:  
  o Budget and Savings Goals Development  
  o Forecasting and Pipeline Management  
  o Energy Engineering, Analysis and Technical Support  
  o Measure Development and Evaluation Support  
  o Trade Ally and Contractor Engagement  
  o Marketing  
  o Outreach and Ongoing Project Support  
  o Customer Service and Call Center  
  o Reporting and Invoicing Capabilities  
  o Operations and Controls  
  o Information Technology  
  o Transition Plan/Schedule  
  o Implementation Plan/Schedule  |

<table>
<thead>
<tr>
<th><strong>Strength and Cohesion of Respondent Team</strong></th>
<th>15%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demonstrated management experience and technical ability that brings a diversity of ideas to address the many components included in this RFP for the design, implementation, marketing/outreach and management and delivery of the program services</td>
<td></td>
</tr>
</tbody>
</table>
5. Governing Provisions

All submitted proposals are subject to the following provisions:

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

5.2 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; or to 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.

5.3 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.

5.4 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.

5.5 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.

5.6 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.

5.7 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.
5.8 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.

5.9 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.

5.10 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 on behalf of contractor are required and must include provisions requiring adherence to specified 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.
6. Index to Appendices

Appendix A: Existing Buildings
Appendix B: Energy Performance Management
Appendix C: Existing Multifamily
Appendix D: Commercial Buildings—Southwest Washington
Appendix E: Business Lighting
Appendix F: Coordination and Collaboration
Appendix G: Program Implementation
Appendix H: Transition
Appendix I: Existing Buildings + EPM + Existing Multifamily—Oregon Measure Build-Up
Appendix J: Commercial Buildings—Southwest Washington Measure Build-Up
Appendix K: Business Lighting Measure Build-Up
Appendix L: Information Technology Requirements
Appendix M: Contracting Information
Appendix N: PMC Pricing and Savings Template
Appendix O: PDC Pricing and Savings Template
Appendix P: DEI Subcontracting Plan Template
Appendix Q: Representations and Signature Page
Appendix R: Intent to Respond/Interest in Teaming Form