Appendix F: Coordination and Collaboration

The Program Management Contractor (PMC) and Program Delivery Contractor (PDC) will need to work effectively with each other and with many program partners, both internal to Energy Trust and external partners, in order to successfully deliver their programs.

1. Coordination and Collaboration between PMC and PDC
Specific areas of coordination and collaboration will be needed between the PMC and the Business Lighting PDC. Areas of coordination and collaboration include but are not limited to:

- Required regular communication between the PMC and lighting PDC managers for established points of collaboration and coordination, such as sharing challenges and successes and coordinating for presence at events where trade allies may have customers with lighting and non-lighting needs
- Market engagement strategies
- Regional strategies and stakeholders including firms contracted with Energy Trust supporting regional, rural, low-income and underserved communities
- Measure development and evaluation support. See Appendix G: Program Implementation for details
- Support for Energy Trust’s Diversity, Equity and Inclusion goals

2. Coordination and Collaboration among PMC, PDC and other Energy Trust Programs and Internal Support Teams
The PMC and PDC will work with Energy Trust’s New Buildings, Residential, Production Efficiency (custom and SEM teams) and Renewable Energy programs. Proposal should detail how the PMC will work to develop a seamless customer experience with one point of contact when possible. The PMC and PDC will be expected to work together to define strategies that deepen customer relationships and include the integration of all program and solar opportunities. Examples of areas in which collaboration across programs will be key include:

- Promoting referrals across programs and providing seamless customer service for all customers
- Measuring development and prioritization for measures that are leveraged in multiple programs
- Aligning when measures or offerings are available across multiple programs, including coordination on incentives, requirements, messaging and market engagement strategies
- Customer service including routing forms, phone calls and emails to other Energy Trust programs sent to their program in error
- Marketing and outreach strategies, including joint stakeholders and industry events
- Trade ally support for contractors that engage with multiple Energy Trust programs
The PMC and PDC will work with Energy Trust internal support teams in a variety of areas. Some examples include:

- Coordinating on the development, review and updating of program forms and collateral
- Coordinating with Energy Trust Planning and Evaluation staff in proposals of new measures and adjustments to existing measures, and assisting with incorporating evaluation findings in continuous improvement of the program design
- Coordinating with Energy Trust audit, quality assurance and evaluation efforts for the program
- Participating in interviews and data assistance for Energy Trust program and pilot evaluations as needed

See Appendix G for more detail on required coordination with internal Energy Trust support teams.

3. Coordination and Collaboration among PMC, PDC and External Stakeholders

- The PMC and PDC will coordinate delivery and marketing efforts with program trade allies, engineering consultants, subcontractors, utilities, trade associations and other organizations, as requested.
- The PMC and PDC will support Energy Trust in coordinating with external stakeholders including, but not limited to, Bonneville Power Administration (BPA), Regional Technical Forum (RTF), Northwest Energy Efficiency Alliance (NEEA), Oregon Department of Energy (ODOE), and Oregon Housing and Community Service (OHCS). Examples:
  - The PMC will coordinate with Energy Trust and public stakeholders, such as with Multnomah County on the County’s Commercial Property-assessed Clean Energy (CPACE) to help inform customers of other offerings and Energy Trust’s support for and coordination with other opportunities
  - Energy Trust coordinates with ODOE to serve Oregon schools that are eligible to participate in both the SB 1149 program offerings administered by ODOE and Energy Trust.¹ When working with schools, the PMC and PDC will coordinate with ODOE on outreach, custom studies, and prescriptive measures to ensure that ODOE and Energy Trust represent a cohesive and complementary set of programs and that they leverage each program’s services and incentives. The PMC will work with Energy Trust and ODOE to ensure that Energy Trust is meeting OPUC requirements regarding combined incentives and services.

¹ For cases in which ODOE 1149 and Energy Trust program funds are combined for schools projects, Energy Trust counts full project savings toward contract and utility goals.
o The PMC will coordinate with OHCS’s Oregon Multifamily Energy Program (ORMEP), which is funded by SB 1149 to provide incentives for energy efficiency upgrades to multifamily affordable housing customers of PGE and PAC. The PMC and ORMEP will work together to help serve customers and to ensure that 1149 funds are not jointly used on the same measures.

- The PMC and PDC will coordinate with Energy Trust’s Communications and Customer Service team for tracking and alignment on community-based organization engagements.
- The PMC and PDC will collaborate with Energy Trust to ensure offerings are complementary with offerings provided by key stakeholders, such as utilities, when applicable.