Appendix H: Transition

To allow for a smooth implementation transition, Energy Trust anticipates overlap by the new PMC and PDC (if a new PMC and PDC is selected) with the current Existing Buildings and Existing Multifamily PMCs and Lighting PDC beginning in September. During the overlap, the incoming PMC and PDC will be responsible for learning day-to-day operation of the program and for developing and finalizing any new program offerings to be implemented at the end of the transition period. During the 2020 transition period, all existing 2020 measures, forms and procedures will remain in effect and the current PMCs and PDC will remain accountable to deliver on annual energy savings goals to Energy Trust.

Energy Trust typically expects a new program implementer to maintain current program offerings, for minimal market disruption, for the first quarter of year before introducing substantive changes; however, given the potential for updates to multifamily and lighting offerings, Energy Trust understands that additional development work may need to occur during the transition period in preparation of an early 2021 launch.

Respondent must clearly outline a transition plan, for the proposed program services as described in RFP Proposal Format and Content/Part 5, that would facilitate a seamless continuation of the specified Oregon and Washington program efforts and maintain market momentum with a goal to introduce new strategies in the second quarter of 2021. If respondent is proposing a new offering or enhancement that is time-sensitive for 1/1/2021 launch (for example, shifting lighting offering to midstream delivery channel as described in Section 5. PDC Business Lighting Specific Transition Tasks (Options 2 and 3) below), respondent must identify a clear rationale and related development costs within the proposal transition plan and proposed transition budget.

Respondents submitting PMC and/or PDC proposals must submit a transition plan and transition schedule, including a Gantt chart. See RFP Proposal Format and Content/Part 5 for requirements.

1. PMC and PDC Transition Tasks

Transition work for both the PMC and PDC includes, but is not limited to, the following tasks:

- Execute a transition staffing plan to ensure adequate ramp-up time and training for staff.
- Participate in orientation sessions.
- Work with Energy Trust and the current PMC/PDC to understand the role of the Trade Ally Network relationships and participate in the hand-off of other strategic program relationships.
- Participate in trainings on Energy Trust's Budget, CRM, Utility Customer Information (UCI) and Project Tracker systems and confidentiality/sensitive data requirements.
- Implement DEI Subcontracting Plan activities as applicable.
- Work with Energy Trust on the communications plan regarding transition.
• Set up phone and email communication channels for customer and ally support, engage in customer and contractor experience training, revise scripts to meet the needs of the program and establish a regular call monitoring process.
• Establish monthly invoicing and reporting templates and forecasting procedures.
• Work with current PMC/PDC to update program collateral, website copy, forms, tools (except for the lighting tool) and applications for 2021 by Energy Trust’s October 2020 deadlines.
• Work with Energy Trust to develop the 2021 scope of work, budget, and goals including development of a new implementation manual (including quality control plan and 2021 marketing plan) and formalize any changes in program processes going forward.
• Work with Energy Trust to finalize energy savings goals and develop the 2021 and 2022 budgets.
• Begin development of a 2021 marketing plan.
• Define collaboration protocols for working with other Energy Trust program implementers.
• Begin development of select program enhancements for the upcoming year.
• Participate in measure development prioritization, some of which happens in Q4 2020.
• For program design changes that would take place January 1, develop MADs, forms, and other needed program materials to implement the new offering.
• Begin general program outreach and learn day-to-day operations by participating in project and lead hand-off activities and meetings with Energy Trust. For example, (i) work with the current PMC/PDC on projects to understand and manage all aspects of participant project recruitment and development; (ii) develop a system for managing active participant projects; (iii) assign individual outreach staff to work directly with current PMC/PDC outreach staff to acquire knowledge about projects in the pipeline including project contacts, history and status; and (iv) make introductions and develop participant relationships.
• Discuss incentive payment structures with Energy Trust compliance audit reviewer to ensure necessary procedures and controls are in place.
• Deliver initial revisions to the program QC plan and implementation manual no later than December 1, 2020.
• Begin to assess and review active custom projects that require continued support and iteration with participant, ensuring personnel are fully informed and prepared to review and close out Quarter 1 2021 projects.
• Set up and test IT systems and any integrations between the implementer’s IT systems and Energy Trust systems.
• Coordinate with existing PMCs and PDC and Energy Trust on a plan for receiving all project documentation – Energy Trust will require existing PMCs and PDC to provide a list of all documentation to both the incoming PMC and/or PDC and Energy Trust prior to delivery of documentation directly to a new PMC and/or PDC.
2. PMC Specific Transition Tasks (Options 1 and 3)

- Work with Energy Trust and the current PMC to understand the role of the allied technical assistance contractors (ATACs).
- Develop a plan to ensure a smooth transition from existing use of current PMC’s ATAC pool.
- Recruit/select ATAC pool if proposing to continue this approach for technical services, or alternatively, outline respondent’s proposed delivery approach where technical services may be delivered by the PMC.
- Transfer energy analysis study work underway by ATACs that won’t be completed in 2020.
- Develop a plan to continue relationships with the existing ATAC pool to finalize studies and complete payments.
- Develop a plan to initiate and review studies that contribute to a healthy pipeline of projects for implementation in 2021 and beyond.
- Develop a customer transition plan with Energy Trust that will include tracking customer relationships.
- Coordinate with the lender Craft3 and with Residential PMC to get agreements and processes into place for Savings Within Reach for multifamily customers.
- Establish distributor relationships and agreements for buy-down offerings.

3. PMC EPM Specific Transition Tasks (Options 1 and 3)

The incoming PMC and EPM team will work with Energy Trust to understand the role of SEM program delivery contractors and participate in the transfer of knowledge and hand-off of contractor and customer relationships to transition to PMC’s proposed delivery structure. This includes the following tasks:

- Participate in trainings on Energy Trust’s systems and policies identified above as well as developed SEM curriculum, the Performance Tracking tool (modeling tool) and program processes.
- Develop a customer transition plan with Energy Trust that will include tracking each individual customer relationship.
- Develop participant relationships and collect customer data to plan and prepare for delivery of an estimated 75 customers in January 2021 for SEM.
- Coordinate with Energy Trust on SEM recruitment for 10-20 SEM Year-1 participants joining new or existing cohorts in 2021.
4. PMC Commercial Buildings—Southwest Washington Specific Transition Tasks (Options 1 and 3)

Transition work for the PMC includes, but is not limited to the following tasks:

- Become familiar with and able to deliver new commercial construction offerings in Washington for both Standard and Custom tracks.
- Assist in development of Washington’s 2021 Energy Efficiency Plan, which gets filed with the Washington Utilities and Transportation Commission in November.
- Work with Energy Trust to facilitate introductions at Clark PUD.
- Work with Energy Trust to facilitate introductions at NW Natural.

5. PDC Business Lighting Specific Transition Tasks (Options 2 and 3)

Energy Trust plans to move select lighting measures to a midstream delivery model in 2021. See Appendix E: Business Lighting for more information. Assuming proposals forecast enough midstream savings, the program would move the select lighting measures to midstream delivery by January 1, 2021.

Respondent must submit a Part 5 transition plan and schedule that includes, at a minimum, midstream program set-up tasks such as:

- Collaborate with the Northwest Energy Efficiency Alliance (NEEA) on existing regional midstream pilots that could influence ways to work with regional distributors.
- Recruit distributors.
- Provide distributor training and develop supporting materials, such as program FAQ and talking points about the program, reminder cards and training on the invoice procedure.
- Work with distributors on setting up invoices and any modifications to their point-of-sale systems.
- Collaborate with Energy Trust marketing on a communications plan for trade allies, including messaging about program changes.
- Collaborate with the Energy Trust systems team to ensure compatibility for processing distributors’ invoices.