Technical Analysis Study (TAS) Proposal

**<Insert Customer Property Name>**

**<Insert Site Address>**

*Proposal submitted to:*



**Energy Trust of Oregon**

**Existing Buildings Program Management Contractor (PMC)**

*Prepared by:*

**<Insert ATAC Company Name>**

**<Insert ATAC Primary Contact>**

**<ATAC Company logo>**

*Submitted on:*

 **<Insert Proposal Date>**

# Project Overview

Please provide the facility details requested in the table below. Feel free to include a narrative on any other details you wish to include.

|  |
| --- |
| **Facility Description** |
| **Customer Property Name**  |   |
| **Facility Type (e.g.: office, grocery etc.)** |   |
| **Year Built** |   |
| **Total Building Area (sq.ft.)** |   |
| **Utility Provider** |
| **Electric Utility Provider** |   |
| **Gas Utility Provider** |   |
| **Proposed Study Format** |
| **Full Technical Analysis Study**  | Select here  [ ]  |
| **Streamlined Technical Analysis Study** | Select here [ ]  |

# Proposed Project or Measure Summary

Please provide a list of measures (or equipment) you propose to study for the customer.

For each measure, briefly describe the following:

* Reasons for investigating the equipment
* Existing conditions (if known)
* Proposed efficiency strategies (if identified at this stage)
* Proposed savings calculations methodology
* High level estimate of the **savings potential and implementation cost**
* Any other relevant information

# Scope of Work

Please provide details of the scope of work or tasks that you will perform towards the proposed Technical Analysis Study (TAS). At minimum, please include the following:

* Conducting the site visit
* Performing energy usage and savings analysis
* Developing and submitting a TAS report along with supporting documentation
* Working with the PMC through the review process and discussions with customers if needed
* Any other tasks you will perform to successfully conduct and deliver this study such as metering, data logging, energy modeling, etc.

# Technical Analysis Study Cost

Please provide the total study fee and a cost breakdown by labor.

**Estimated cost breakout to perform the Scope of Work detailed above:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Project Tasks** | **<Insert Staff title>** | **<Insert Staff title>** | **<Insert Staff title>** | **Total Fee** |
| **Hourly Rate** |  | **Hourly Rate** |  | **Hourly Rate** |  |
| **Hrs** | **Fee** | **Hrs** | **Fee** | **Hrs** | **Fee** |
|   |   | $0 |   | $0 |   | $0 | $0 |
|   |   | $0 |   | $0 |   | $0 | $0 |
|   |   | $0 |   | $0 |   | $0 | $0 |
|   |   | $0 |   | $0 |   | $0 | $0 |
|   |   | $0 |   | $0 |   | $0 | $0 |
|   |   | $0 |   | $0 |   | $0 | $0 |
|   |   | $0 |   | $0 |   | $0 | $0 |
| **Total** | - | $0 | - | $0 | - | $0 | **$0** |

**TAS Proposals are evaluated in respect to the following:**

* Measure(s) proposed and scope of work
* Equipment complexity and data collection approach
* Proposed savings analysis methodology
* Estimated energy savings potential and measure costs
	+ Potential to meet program cost-effectiveness
	+ Proposed savings relative to annual site usage
* Reasonableness of the proposal fee
	+ Must be less than maximum potential incentive

# Estimated Timeline

**Estimated timeline (in weeks) to perform the scope of work detailed above:**

**Estimated site visit date:**

**Estimated TAS delivery date:**

# Submission Guidelines and Requirements

Submit the TAS Proposal by emailing it to the Existing Buildings Program Management Contractor (PMC) at EBcustom@trccompanies.com and cc the Energy Advisor (if known).

Include the following as attachments:

* TAS proposal
* Enrollment form filled and signed by the customer (Energy Advisors can assist with this)
	+ Oregon Existing Buildings – Custom Energy Assessment Request 100E
		- [https://www.energytrust.org/wp content/uploads/2020/04/BE\_FM0100E.pdf](https://www.energytrust.org/wp%20content/uploads/2020/04/BE_FM0100E.pdf)
	+ Washington Existing Buildings – Custom Energy Assessment Request 100E-WA
		- <https://www.energytrust.org/wp-content/uploads/2020/04/BE_FM0100E-WA.pdf>
* Any other documentation to support your proposal
* Documents for your reference:
	+ Cost-Effectiveness Calculator Tool – Oregon and Washington
		- <https://www.energytrust.org/wp-content/uploads/2020/04/ATAC-Cost-Effectiveness-Calculator-Tool-Oregon-and-Washington.xlsm>
	+ Technical Analysis Study Fee Template – Oregon and Washington
		- <https://www.energytrust.org/wp-content/uploads/2020/04/Technical-Analysis-Study-Fee-Template-Oregon-and-Washington.xlsx>