

REQUEST FOR QUALIFICATIONS (RFQ)

Solar Verifiers

Posted through October 2, 2020

Energy Trust of Oregon, Inc. (Energy Trust), an Oregon non-profit, 501(c)(3) corporation, is seeking qualifications from respondents with skills in solar project design review and site inspection in order to create a pool of qualified verifiers for Energy Trust's Solar Program ("Solar Program"). Multiple verifiers may be selected for the pool based on their submissions to this RFQ. Energy Trust encourages the participation of all types of businesses, including minority-owned, woman-owned and small businesses, in competing for contracts with our programs and operations.

1. Energy Trust Overview

Energy Trust is an independent nonprofit organization dedicated to energy efficiency and renewable power development. The Solar Program provides cash incentives to customers of Pacific Power, and Portland General Electric for the installation of qualified solar electric (photovoltaic) systems.

2. RFQ Background

The purpose of the RFQ is to provide Energy Trust with a group of qualified expert consultants who can quickly and capably respond to requests to review solar system designs and travel to verify completed installations.

The verifiers selected through this RFQ would, upon selection into the pool, provide design review and verification services (both onsite and remote) to ensure that solar electric systems that are to receive Energy Trust incentives are in compliance with the Solar Program's Installation Requirements.

It is anticipated that Energy Trust will enter into a written contract with a limited number of respondents selected through the RFQ process shortly after Energy Trust makes a selection. It is not expected that all respondent submissions will be selected for written contracting. For selected respondents, contracts will have a term not longer than two years. Distribution of project assignments among selected verifiers will be based on contract performance, verifier location, technical expertise, experience, and availability, at Energy Trust's sole discretion.

While Energy Trust anticipates a distribution of assignments and funds depending on the resources and expertise of the consultant pool, Energy Trust does not guarantee that any consultant selected for the pool through this RFQ will receive a task assignment or funding.

3. RFQ Schedule

Posting of Request for Qualifications	September 11, 2020
Deadline to submit written questions/requests for clarification	September 18, 2020
Posting of responses to submitted questions/requests for clarifications on website	September 25, 2020
Deadline for submission by respondents of qualifications	October 2, 2020
Announcement of selected respondents	Week of October 26, 2020
Anticipated contracting	October-November, 2020

Submissions in response to this RFQ will be accepted on an ongoing basis until the deadline listed in the Schedule. All submissions must be emailed, by the deadline listed in the Schedule above, to: robert.wyllie@energytrust.org (Solar Program). The subject line of the emailed submission must clearly state: ***Time Sensitive: RFQ Response – Solar Program Verifiers.*** Confirmation of receipt will be sent via reply email within one business day.

Verbal questions and discussions with Energy Trust staff about the RFQ cannot be accommodated. Any questions, requests for clarification and/or additional information regarding this RFQ must be submitted via email to the contact listed above. The subject line of the emailed question/request for clarification must clearly state: ***Time Sensitive: RFQ Question – Solar Program Verifiers.***

Questions and/or requests for clarification will be collected, anonymized, and posted on Energy Trust's website, at the same website location where this RFQ is posted, on the date shown in the Schedule above.

4. Compensation

Upon selection and after finalizing and executing a written contract with Energy Trust, each verifier will be paid an hourly rate for work that is assigned by the Solar Program (typically limited to 4 hours per project including travel). The hourly rates vary based on the type of work assigned, categorized as ***Coordination, Administration, and Customer Support*** (Bill Rate: \$50/hour), ***Design Review and Verification*** (Bill Rate: \$75/hour), and ***Consultation and Management*** (Bill Rate: \$100/hour). See **Section 6** Description of Tasks for further details. If pre-approved by the Solar Program, reasonable expenses will also be compensated. Verifiers will provide a monthly itemized invoice.

5. Respondent Requirements

A. Independent Contractor Status

Selected verifiers will be independent contractors to Energy Trust. The successful candidates must be in a position to act as independent contractors. Verifiers shall not be owners, employees, suppliers, or subcontractors of any Solar Program trade ally contractor.

B. Insurance

As an independent contractor, verifiers must carry their own commercial general liability and automobile insurance, at a level to be specified by Energy Trust.

Energy Trust strongly recommends that potential RFQ respondents provide a copy of this RFQ, including the Description of Tasks, to your insurance agent so that you can verify with your insurance professional which types and amounts of insurance would provide best coverage for the verifier services. Our staff is also available if your insurance agent has any questions or would like more detail about the type of work our verifiers perform.

At a minimum, Energy Trust typically requires proof of at least the following:

1. Workers' Compensation insurance as required by law;
2. Automobile Liability insurance with a combined single limit of \$300,000, or, if the policy is written with split limits, \$100,000 bodily injury per person, \$300,000 bodily injury per accident, and \$100,000 property damage per accident. Coverage must include owned, non-owned, and hired motor vehicles; and
3. Per occurrence-based Commercial General Liability insurance (including contractual liability and completed operations coverage) with not less than \$1,000,000 per occurrence for bodily injury and property damage liability, and an annual aggregate limit of not less than \$1,000,000. Energy Trust will require that this policy include (i) an "Additional Insured" provision or endorsement stating "*Energy Trust of Oregon, Inc., is an Additional Insured as respects any work performed for or on behalf of the Energy Trust program(s)*", (ii) a cross liability or separation of insured's clause, and (iii) an acknowledgement that in the event of a loss, the verifier's policy will be primary.

Energy Trust may reject any insurance carrier(s) with an unacceptable financial rating (generally Energy Trust requires an *A.M. Best's Rating* of "A-" or better). Energy Trust will require that insurance certificates evidencing the minimum insurance requirements be provided at the time of contracting and on an ongoing basis.

C. Equipment

Verifiers must provide their own means of transportation and navigation. Assigned work will require a basic tool kit, including a clamp-on digital multimeter, a transportable ladder and binoculars. Verifiers may need access to other specialized equipment for solar resource assessment or site analysis. Verifier personnel will to be need physically able to climb ladders and walk on roofs.

Verifiers receive assignments and report results through email, through PowerClerk®, a licensed online project tracking platform currently used by Energy Trust's Solar Program, and through Site Capture, a licensed online remote site verification application currently

used by the Solar Program. Verifiers must provide and maintain their own computer equipment and secure internet access sufficient to be able to complete the assigned tasks.

D. Confidentiality

Verifiers will be required to use and maintain Energy Trust program participant information as confidential information and in accordance with all Energy Trust requirements on the protection and use of information. Specific requirements on the protection and use of information will be contained in the written contracts between Energy Trust and the selected verifiers.

6. Description of tasks

All tasks will require the ability to work within specified timeframes and assignments will be based on contract performance, verifier location, technical expertise, experience, and availability, at Energy Trust's sole discretion. Verifiers will be expected to maintain professional demeanor in interactions with Energy Trust trade ally contractors and Solar Program participants. Tasks may include:

- A. Expert evaluation and review of solar electric and solar + battery storage project designs. [*Design Review and Verification (Bill Rate: \$75/hour)*]** Design review services will include technical evaluation of system design documents, schematic drawings and equipment specifications to assess compliance with Program Installation Requirements. Design review process may include consulting with trade ally contractors on how to bring projects into compliance with Program Installation Requirements. Review shall take no more than 30 minutes for residential systems, 45 minutes for nonresidential systems. Results of design reviews will be completed and submitted to Energy Trust within 3 business days of project assignment;
- B. Expert evaluation and review of solar electric and solar + battery storage remote verification reports. [*Design Review and Verification (Bill Rate: \$75/hour)*]** Review of the remote verification reports will include using the Program's selected online remote site verification application, currently SiteCapture, to complete a technical evaluation of the data and images provided by solar trade allies to assess compliance with Program Installation Requirements. The self-verification report review may include consulting with trade ally contractors on how to bring projects into compliance with Program Installation Requirements. Results of the self-verification will be completed and submitted to Energy Trust within 8 business days of project assignment;
- C. Provide onsite verification of completed solar electric and solar + storage installations. [*Design Review and Verification (Bill Rate: \$75/hour)*]** Verification services will include site visit scheduling directly with a system owner and/or trade ally installer, travel to installation sites, assessment of adherence to Program Installation Requirements, and photo documentation of site visit using the Program's selected online remote site verification application, currently SiteCapture. Time spent onsite shall take no more than 30 minutes for residential systems, 45 minutes for nonresidential systems. Verifications will be completed within 2 weeks of inspection request and reported to Energy Trust within 5 business days of the site visit;

- D. Provide dedicated staff to ensure timely communication and follow-up. [Coordination, Administration, and Customer Support (Bill Rate: \$50/hour)]** Verifiers will be required to provide adequate administrative staff to enable timely responses to all inquiries from program staff and trade ally contractors within 3 business days, including those made through phone, email, or the Program's selected tracking platform(s), currently PowerClerk, or Site Capture, etc. Maintain design review and verification queues and ensure updates are reflective of true current status within 1 business day. Maintain bookkeeping, reporting and project tracking on an ongoing basis;
- E. Provide dedicated consulting time for solar trade ally support. [Consultation and Management (Bill Rate: \$100/hour)]** Verifiers will be required to provide at least 3 hours per week as "open office hours" where Solar Program trade allies can discuss or otherwise resolve pending questions or issues, support new trade ally onboarding, resolve escalated trade ally concerns about required corrections working with program staff to reach resolution as needed, oversee verifier support staff to deliver administration and review of all verifier activities;
- F. Provide technical consulting for solar program support. [Consultation and Management (Bill Rate: \$100/hour)]** Verifiers will consult with the Solar Program on areas related to their technical subject matter expertise in support of program enhancements and new offers; and/or
- G. Participate in conference calls and/or meetings. [Coordination, Administration, and Customer Support (Bill Rate: \$50/hour)]** Verifiers will have appropriate technical and/or administrative staff participate in a twice weekly coordination meeting to discuss pending questions or issues. As agreed upon, verifiers will participate in meetings or conference calls to stay up-to-date on Program requirements and ensure standards are being enforced in a consistent manner.

7. Submission Requirements

To be considered complete and ready for review, include the following sections (Experience and Qualifications and Conflict of Interest Disclosures) in order in your submission, with each section clearly labeled:

A. Respondent Experience and Qualifications

Provide a short letter describing respondent's qualifications to perform the verifier services as described in this RFQ, specifically addressing each of the following:

1. Company name and primary business, location of office(s) and contact information.
 - Is your firm a minority or woman-owned business?
 - Have you applied for or received certification by Oregon's Certification Office for Business Inclusion and Diversity (COBID), or by a similar entity, as meeting one of the following categories? If so, specify.
 - Minority-owned businesses (MBE)
 - Woman-owned businesses (WBE)
 - Emerging small businesses (ESB)
 - Service-disabled veteran-owned businesses (SDV)

2. List relevant experience, training and credentials; include dates or date ranges. Describe the nature and scope of your company and key personnel's experience and qualifications. Attach resumes for key personnel. Specify whether the identified experience is with residential, commercial and/or industrial applications. In particular, list and describe:
 - Experience inspecting or reviewing design work for solar electric or other electrical, plumbing or mechanical systems.
 - Experience enforcing compliance with design or installation standards.
 - Experience designing or installing solar electric or other electrical, plumbing, or mechanical systems.
 - Relevant training or education coursework completed.
 - Relevant licenses, degrees, or credentials, including any state or federal certification, awards or recognition regarding your firm's diversity, equity and inclusion activities.
 - Address efforts and experiences in integrating diversity, equity, and inclusion internally in your firm.
3. Describe your ability to meet the respondent requirements specified in **Section 5**, above. If you are not currently covered by sufficient automobile or general liability insurance, please comment on your ability to obtain insurance.
4. Describe your availability and ability to meet project review and verification timeframes specified in **Section 6**, above.
5. Provide information about your location and preferred range of travel. When possible, Energy Trust prefers to use verifiers who are located close to project sites and can minimize travel expenses. Verifiers will be selected in various locations in Oregon.
6. Provide contact information for three references regarding your listed relevant experience.

B. Respondent Conflict of Interest Disclosures

1. Disclose any direct or indirect, actual or potential conflicts of interest respondent has with Energy Trust. A "direct or indirect conflict" is defined as any situation in which an individual or member of their family or close business or personal acquaintance, is employed by Energy Trust or the Oregon Public Utility Commission, or may be reasonably construed to have a direct or indirect personal or financial interest in any business affairs of Energy Trust, whether because of a proposed contract or transaction to which Energy Trust may be a party or may be interested or is under consideration, or whether such conflict is purely conceptual, because of similarity of business interests or affairs. If no such conflict exists, provide an explicit statement to that effect. The determination of whether a conflict of interest exists is left to Energy Trust at its sole discretion.
2. Energy Trust solar verifiers are expected to be impartial when enforcing Program requirements and not to compete with solar contractors by providing similar services. Disclose any personal or financial interest respondent has in any business providing solar, electrical, plumbing or mechanical design, installation or consultation services. If

you currently perform design, installation or consultation work, describe the nature and scope of the work and how you would avoid a conflict of interest if selected to contract with Energy Trust as a verifier. If no such conflict exists, provide an explicit statement to that effect. The determination of whether a conflict of interest exists is left to Energy Trust at its sole discretion.

8. RFQ Governing Provisions (By submitting a response to this RFQ, respondent represents that it is authorized to submit a response and - explicitly agrees and accepts the following provisions of this RFQ and all other terms and conditions set forth in this RFQ).

A. Right to Accept or Reject

This RFQ is not an agreement to purchase goods or services. Energy Trust is not bound to enter into a contract with any qualified respondent. Energy Trust reserves the right to modify the schedule or terms of this RFQ at any time in its sole discretion. This includes the right to cancel or revise this RFQ at any time. Further, Energy Trust reserves the right to waive any nonconformity in submissions received, to accept or reject any or all of the items in the submission, and award any ultimate contract in whole or in part as it is deemed in Energy Trust's best interest.

B. Ownership of Responses

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

C. Confidentiality

Respondents shall clearly identify those proprietary portions of their responses that they do not want revealed to third parties and label such portions as "Confidential Information." Except as required under Energy Trust policy, law or for regulatory purposes Energy Trust will maintain confidentiality of such information.

D. Respondent Expenses

Respondents are solely responsible for their own expenses in preparing a response and for any subsequent negotiations. Energy Trust will not be liable to any respondent for any claims, whether for costs or damages incurred by the respondent in preparing the response, loss of anticipated profit in connection with any final contract or any other matter whatsoever.