

Responses to Questions Submitted by Bidders

March 21, 2022

Section 2

Question: *Table 5 of the RFP calls for a four-page limit for cover page, table of contents and Executive Summary. Our table of contents alone is two pages, would Energy Trust consider removing the table of contents and cover page from the page count?*

Answer: Energy Trust will not count Table of Contents pages in the four-page limit noted in Table 5 of the RFP. The four-page limit will apply to the cover page and Executive Summary only.

Proposal Content Part 2

Question: *Part 2.E in the RFP asks bidders to discuss their approaches to identify and analyze gas-saving projects. Does Energy Trust want only approaches specific to SEM savings here, or to discuss gas-saving project identification for the Custom track in general?*

Answer: This is about SEM savings specifically. Gas savings through the Production Efficiency SEM offerings are more difficult to acquire relative to electric savings.

Proposal Content Part 4

Question: *What additional budget items that were previously handled by Energy Trust's internal Marketing team (collateral budget, media buys, events, research, outsourced content creation, etc.) will now be the responsibility of the proposal team to include in our scope and pricing? Asked another way, what activities and expenditures (beyond staffing) will remain in-house for Energy Trust Marketing?*

Answer: The marketing scope for bidders proposing to deliver the **full program** will include the full range of marketing services, including developing an annual strategic marketing plan for the program that includes goals, strategies, and tactics to reach program goals.

The RFP does not ask for bidders to develop the marketing plan or budget for marketing activities and collateral. Instead, we ask for bidders to describe the **capabilities and qualifications** of their marketing team and provide a clear **description of the approach** the bidder will take to resource, plan, and execute Production Efficiency marketing for the entire program.

The selected prime contractor will collaborate with Energy Trust to develop a budget for marketing and will implement all strategies, including production of all materials and activities, except those that are specifically called out in the RFP as managed by Energy Trust program marketing, such as public relations.

Proposal Content Part 6A

Question: *Qualifications of the RFP indicates “If the prime bidder or any subcontracted team members are not currently located in Oregon, include a plan and timing for how you would build a presence and deliver services in Oregon.” We have subcontractor firms on our team that are not based in Oregon but that have staff we propose as key personnel who are physically located in Oregon. Our assumption is in this scenario the subcontractor would be considered Oregon-based – is this correct?*

Answer: Energy Trust considers Oregon-businesses as those domiciled in Oregon and/or regularly maintaining a place from which business is physically conducted in Oregon. Subcontractor personnel who are physically located and conducting business in Oregon would be considered Oregon-based, even if the company is headquartered in another state.

Question: *Qualifications in the RFP requests a technical study work sample. Can technical studies completed for current Energy Trust participants be provided without redaction?*

Answer: No. Please provide redacted work samples to protect the confidentiality of customer information.

Question: *Our assumption is to provide a technical study work sample for the prime contractor only, and not provide work samples for subcontractors. Is this correct?*

Answer: Bidders are welcome to provide work samples from subcontractors who will be conducting technical studies.

Proposal Content Part 7

Question: *Part 7.B in the RFP asks bidders to describe proposed insurance coverage for performing the program work. If a bidder’s insurance coverage meets Energy Trust’s requirements, may we attach a general insurance certificate in the appendix in lieu of providing a narrative in Part 7.B?*

Answer: Yes, this is acceptable.

Appendix D: Pricing and Savings Proposal Template

Question: *Account Management SEM support is stated as a Delivery Cost. However, the cost for this activity is included under SEM in the pricing tool (Activity - 3.4 Account Manager SEM support). Is the intent to include this cost under SEM for pricing purposes in the proposal?*

Answer: Yes, the delivery of SEM has two components and is correctly set up in the Pricing and Savings Proposal Template. The account manager support of SEM is paid as a contract payment. SEM coaching and modeling are technical services that are paid as service incentives.

Appendix L: Employee Data Template

Question: *Should the employee data requested in Appendix L be for the entire staff of each company, or just those proposed for the contract?*

Answer: Please include data for the entire staff of each company.

Appendix M: Contracting Plan

Question: *Our interpretation of Appendix M Contracting Plan Template is that bidders should create a separate attachment in MS Word addressing all items in Appendix M starting with the Contractor Firms and Service Description header and provide this document as a proposal attachment. Can Energy Trust please confirm this approach?*

Answer: Yes. Please use this as a template, and provide as an appendix to your proposal, the content as requested in three sections:

- Contractor Firms and Service Description
- Methods to Expand Diverse Contractor Opportunities
- Administration and Record Keeping

Question: *Regarding the Contracting Plan Tab in Appendix D: Could Energy Trust either add rows for additional partners or unlock it so we can? In the same tab, do we add additional firms for the full contract like additional Marketing etc.? If so, where?*

Answer: The Contracting Plan narrative, “Contractor Firms and Service Description” section is a list of all firms involved on the proposed team, and a description of the services they will provide. All proposed firms should be included in the Contracting Plan narrative, and in the Contracting Tab in Appendix D.

If you are proposing more subcontractors than there is space in the template, please email industrialsolicitations@energytrust.org to request a version of the template with additional rows.