Energy Trust of Oregon

Request for Proposals:

2024 Process Evaluation of Commercial and Industrial Strategic Energy Management Services and Energy Performance Platform Assessment

Posted: July 15, 2024

Intent to Bid and Questions Due: July 24, 2024

Proposals Due: August 16, 2024

Cody Kleinsmith
Project Manager – Evaluation

Energy Trust of Oregon
421 SW Oak St., Suite 300
Portland, OR 97204

Email: Cody.Kleinsmith@energytrust.org

EnergyTrust of Oregon

About Energy Trust

Energy Trust of Oregon is an independent nonprofit organization dedicated to delivering energy efficiency and renewable power benefits to 2 million utility customers. We are funded by and serve Oregon customers of Portland General Electric, Pacific Power, Cascade Natural Gas and Avista, and Oregon and Washington customers of NW Natural. A non-stakeholder board of directors guides our work with input from three advisory councils, and we are overseen by the Oregon Public Utility Commission. Since 2002, our technical services, cash incentives and energy solutions have helped participating customers save $6.3 billion on their utility bills. The cumulative impact of our leadership has been a contributing factor in keeping our state's energy costs as low as possible, adding renewable power to the grid from small and medium-scale projects, and building a sustainable energy future. More information about Energy Trust's background, funding sources, strategic and action plans, policies and programs are available on our website at www.energytrust.org/about.

Some of Energy Trust's requirements in this RFP and in any subsequent negotiating and/or contracting phases are driven by governing law, the provisions of our grant agreement with the OPUC (the OPUC Grant Agreement) and our funding agreements with each utility.

Introduction

Energy Trust of Oregon is seeking an evaluation firm to conduct a process evaluation of its Commercial and Industrial Strategic Energy Management services ("SEM services") and provide an assessment of the Energy Performance Platform that was launched in 2023 to support C&I SEM services.

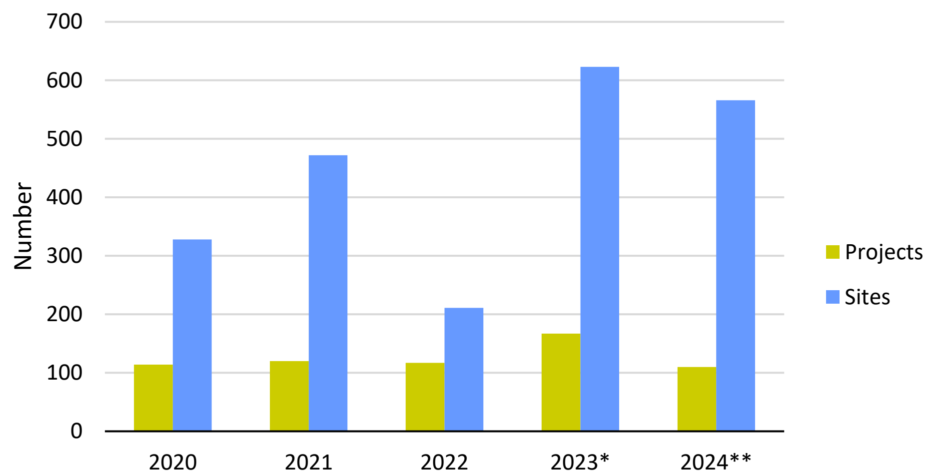
Energy Trust's Existing Buildings (EB) and Production Efficiency (PE) programs provide SEM services and incentives to commercial and industrial (C&I) utility customers in Oregon, respectively. These SEM services are relatively mature and have been in place for over ten years. SEM differs from traditional energy efficiency programs by focusing on holistic strategies that extend beyond replacing or upgrading inefficient equipment. Energy Trust provides energy consulting services, tools, and education, through SEM delivery contractors, to help businesses understand their energy use and identify and eliminate energy waste. SEM engagements last about a year and participants have the option of re-enrolling annually. SEM services have evolved over the years, but, in general, cohorts of participating customers attend a series of training workshops and receive one-on-one consulting with an energy expert. C&I SEM helps businesses develop an energy strategy, obtain commitment from top management, integrate energy monitoring and management into their business practices, and identify and implement specific energy saving opportunities. SEM focuses on operations and maintenance improvements, but customers in SEM may also make capital energy upgrades. Customers also receive incentives for achieving specific program milestones and for each kWh and therm saved at the end of each year of SEM engagement.

SEM savings are typically estimated based on a top-down analysis of facility energy use and do not include savings from known capital measures completed at the site, including through other program tracks. In some cases, savings are estimated using bottom-up engineering calculations. Until recently, energy tracking and savings calculations were handled through spreadsheet tools managed by each customer with assistance from the SEM delivery contractors. In 2023, Energy Trust began using a centralized, online Energy Performance Platform (EPP), under a license agreement with Cascade Energy. The EPP handles most data management, energy tracking, and savings calculations for C&I SEM. The EPP provides C&I SEM participants with convenient, self-serve access to energy trends, project lists, estimated energy savings, and data visualizations for enrolled facilities. In addition, the EPP computes energy savings for each participant and facility at the end of each engagement, based on the energy models, which Energy Trust uses to claim savings and pay year-end customer incentives.

Commercial SEM is overseen by Energy Trust staff and managed by the EB program, which is currently operated by TRC Companies (beginning in 2021). The delivery team consists of SEM coaches from subcontractors AESC and Strategic Energy Group, with project management, engineering, and technical review support from ASK Energy. Between these entities, more than 30 staff help deliver Commercial SEM. Energy Trust enrolled the first participants in Commercial SEM in the fall of 2011. Commercial SEM now accounts for a large portion of the EB program's savings, with significant annual gas and electric savings. Commercial SEM focuses on organizations that operate large portfolios of commercial buildings and provides support to participants on a long-term basis. Currently, participants are divided into a Spring and a Winter cohort. In 2023 the spring and winter SEM cohorts made savings claims using different methodologies. During the COVID-19 Pandemic, SEM shifted from a model-based approach to a more prescriptive approach, based on historic savings trends per activity in different building types. In 2023, the spring cohort was the last to use this COVID era methodology, referred to as Savings Rate Tables or SRT, while the winter cohort marked the first to return to using models to claim savings.

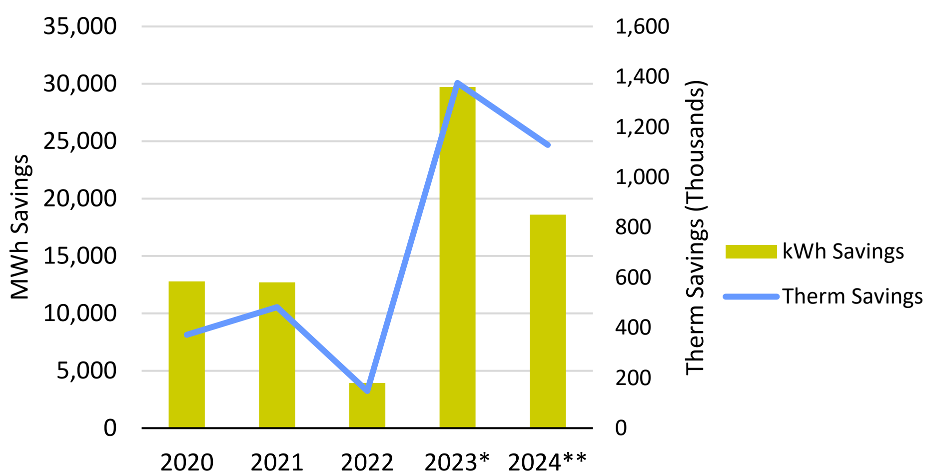
Industrial SEM is overseen by Energy Trust staff and managed by the PE program, which is currently operated by Energy 350. Energy Trust restructured the PE program at the beginning of 2023, transitioning to a PMC model, and Energy 350 assumed management of the program and of Industrial SEM services at that time, with oversight by Energy Trust staff. The delivery team consists of SEM coaches from Energy 350 and subcontracted engineering and technical review support from Burch Energy, AESC, LD Consulting, and ASK Energy. Between these entities, roughly 15 staff help deliver Industrial SEM. Energy Trust started offering Industrial SEM through the PE program in 2009. SEM services are provided to industrial facilities with food processing and refrigerated storage, manufacturing, lumber product production, and other types of operations with high energy intensity. They are generally facilities that require large amounts of energy to operate, with energy and facility managers overseeing equipment and systems operations.

Figures 1 and 2 show the trend in Commercial SEM enrolled customer organizations (projects), sites, and savings, for customers that reported energy savings, from 2020 to 2024. 2024 projects include SEM participants that completed their annual cycle of activities early in 2024, plus forecasts for participants that will complete later in the year. Forecasted project completions and savings are subject to change and may substantially over- or under-estimate energy savings that will be officially claimed by the end of the program year. A distinct drop in Commercial SEM projects and sites can be seen during the pandemic, most visibly in 2022, followed by a rebound in 2023. However, this does not necessarily represent a drop in enrolled sites, SEM participants, or savings. Many projects that completed near the end of 2022 were officially recognized in 2023, skewing the results for those two program years somewhat. In addition, customer projects and enrolled sites with no reported energy savings are not included in these charts.



* Includes projects completed in late 2022 recognized in early 2023
**Includes forecasted projects

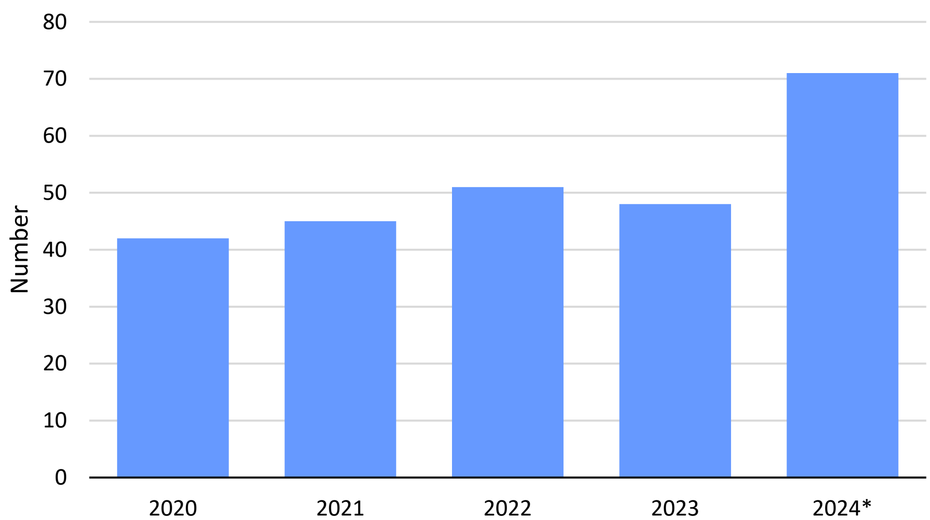
Figure 1: Commercial SEM Projects and Sites Reporting Annual Savings by Year



* Includes projects completed in late 2022 recognized in early 2023
**Includes forecasted projects

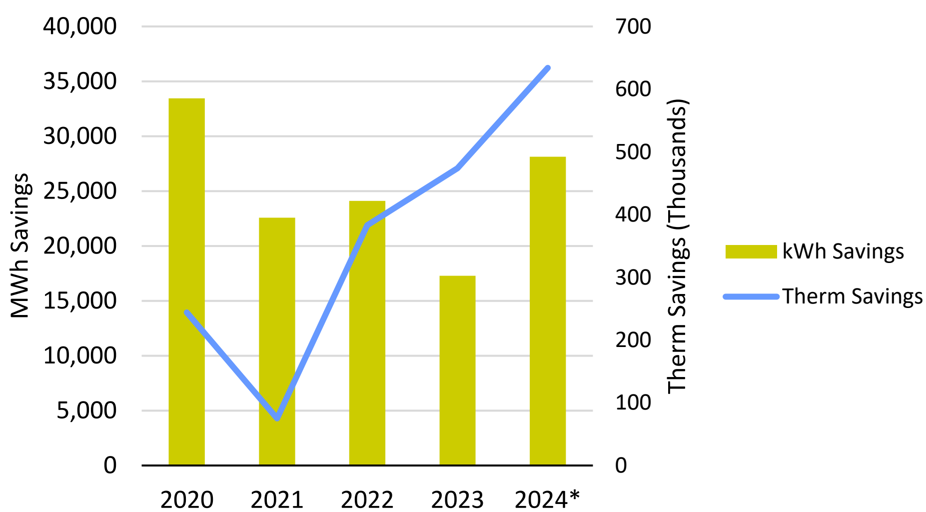
Figure 2: Commercial SEM Annual kWh and Therm Savings Claimed by Year

Figures 3 and 4 show the trend in Industrial SEM participant sites and savings, for enrolled customers that reported energy savings, from 2020 to 2024. 2024 projects include both SEM participants that completed their annual cycle of activities early in the year, plus forecasts for participants that will complete later in the year. Forecasted project completions and savings are subject to change and may substantially over- or under-estimate energy savings that will be officially claimed by the end of the program year. Unlike Commercial SEM, the trend in number of enrolled Industrial SEM customers reporting energy savings was relatively flat in the aftermath of the pandemic. However, Industrial SEM energy savings claims dropped in 2021 and remained lower for electricity savings while gas savings quickly recovered. Customer sites with no reported SEM energy savings are not included in these charts.



*Includes forecasted projects

Figure 3: Industrial SEM Sites Reporting Annual Savings by Year



*Includes forecasted projects

Figure 4: Industrial SEM Annual kWh and Therm Savings Claimed by Year

Tables 1 and 2 summarize Commercial and Industrial SEM program activity, respectively, for 2023 and 2024 year-to-date and forecasted SEM activity. As with the charts above, the figures in the tables represent enrolled participants that reported energy savings in the 2023 and 2024 program years. Enrolled SEM participants sites with no reported energy savings in a given year are not included in these charts. It should be noted that each year there are some active participants sites that do not achieve reportable savings through SEM, so these numbers underestimate the total number of organizations and sites enrolled in the program. Currently, in 2024, there are about 110 organizations enrolled in Commercial SEM, with over 500 active sites, and about 70 facilities enrolled in Industrial SEM. Summary data for 2024 contains both program activity associated with SEM projects completed to date, as well as forecasted program activity and savings for SEM projects that will be completed later in the year. Project forecasts represent point in time estimates, are subject to change, and are often revised throughout the year.

Table 1: Summary of Commercial SEM Program Activity, 2023 and 2024

Year	Customer Projects	Sites with Savings	kWh Savings	Therm Savings	Savings Incentives	Milestone Incentives	Other Payments
2023*	167	623	29,724,225	1,375,085	$866,387	$400,200	$116,895
2024**	110	566	18,599,770	1,128,479	$586,171	$172,000	$21,235

Note: Commercial participants typically have multiple sites actively enrolled in Commercial SEM within a single SEM project, especially large organizations that operate numerous facilities.
* Includes projects completed in late 2022 recognized in early 2023, inflating the numbers somewhat.
** Includes program summary data for forecasted projects and savings that are subject to change.

Table 2: Summary of Industrial SEM Program Activity, 2023 and 2024

Year	Sites with Savings	kWh Savings	Therm Savings	Savings Incentives	Milestone Incentives
2023	48	17,283,446	473,895	$1,075,707	$101,000
2024*	71	28,130,384	633,573	$750,294	$63,000

Note: Industrial participants typically have one site enrolled in SEM, so there is no distinction between customer projects and sites for Industrial SEM.
* Includes program summary data for forecasted projects and savings that are subject to change.

For more background on Energy Trust's Commercial and Industrial SEM services, recent Existing Buildings and Production Efficiency program process and impact evaluations may provide additional context and background. All of these reports can be found on Energy Trust's website at: https://www.energytrust.org/about/reports-financials/documents/.

Research Goals and Objectives

Energy Trust performs process and impact evaluations on all of its programs on a regular basis. Commercial and Industrial SEM services have grown and evolved over the years, particularly since the COVID-19 pandemic and the launch of the Energy Performance Platform in 2023. Commercial SEM, delivered by the Existing Buildings program, and Industrial SEM, delivered by the Production Efficiency program, will be evaluated separately, but their services will be closely compared and contrasted to identify areas of potential alignment and improvement. This process evaluation will document the current structure and delivery of SEM services in each program, successes and challenges with SEM, recent program changes and plans, and customer experiences with SEM and the new Energy Performance Platform. The evaluation will also assess the effectiveness of the programs in reaching and serving eligible customers, the remaining market for SEM services, and progress towards diversity, equity, and inclusion (DEI) goals.

Commercial SEM has specific DEI goals that will be reviewed and assessed while Industrial SEM contributes to sector-wide DEI goals but does not have its own specific goals. The evaluation will take a forward-looking approach to understand how the programs need to evolve their SEM services to be successful in the future and best serve commercial and industrial customers. Program processes, project tracking data, staff and delivery contractor perspectives, and the experiences of customers will all be evaluated to develop a comprehensive picture of the SEM services provided and areas for improvement.

The overarching purpose of this process evaluation is to obtain feedback that Energy Trust can use to improve its C&I SEM services and Energy Performance Platform to serve customers more effectively and efficiently. All evaluation results will be program-specific, with distinct findings for Commercial and Industrial SEM. The goals and objectives of the evaluation are listed below.

Goal 1: Describe how the SEM programs work and identify areas for improvement.

- Document current program structures, operations, and delivery of services
- Document recent program accomplishments, successes, and challenges
- Document recent program changes and their impacts, including responses to and recovery from the pandemic
- Understand how current program structures and operations are working for Energy Trust staff
- Understand how current program structures and operations are working for implementers
- Understand how the pandemic impacted program processes
    - Identify areas that could be optimized for post-pandemic realities
    - Identify areas where pre-pandemic processes could be revived
- Identify areas where program structures and operations could be improved
- Identify how the two SEM programs differ and areas where they could be better aligned

Goal 2: Describe the participant experience with SEM and identify areas for improvement.

- Understand the participation process and participant experience
- Understand how well programs are serving current participants
- Understand how well current program structure and operations are working for participants
- Identify areas where the participant experience could be improved
- Explore participant experiences by organization size, type, and geographic region

Goal 3: Determine how to reach and serve non-participants.

- Identify barriers to SEM for organizations that have never participated
- Understand non-participant organization priorities and needs
- Identify strategies to engage non-participant organizations in SEM
- Identify alternative program processes or alternative services that might work better for non-participant organizations
- Explore non-participant barrier, priority, and engagement strategy results by organization size, type, and geographic region

Goal 4: Quantify the remaining market and electricity and gas savings potential for the SEM programs.

- Understand characteristics of participating organizations
- Document most common types of action and largest sources of SEM savings
- Assess how well programs are serving population of eligible organizations
- Understand remaining savings opportunities for current participants
- Determine remaining market potential for SEM among both participants and non-participants

Goal 5: Describe how the Energy Performance Platform (EPP) is working for Energy Trust and identify areas for improvement.

- Document the transition to the EPP from prior spreadsheet-based tools and its impacts on the SEM programs and their operations, in both the short-term and long-term
- Understand how well the EPP is working for Energy Trust staff and implementers
- Understand the implementer experience with the EPP
- Estimate the staff time impacts for implementers and internal Energy Trust staff resulting from the EPP compared to prior spreadsheet-based tools
- Assess the functionality of the EPP compared to prior spreadsheet-based tools and to SEM program operational needs
- Assess consistency and robustness of energy models and savings estimates produced by the EPP
- Assess integration of the EPP with Energy Trust's Utility Customer Information database and other data systems and sources
- Identify areas where the EPP could be improved for Energy Trust and implementers

Goal 6: Describe the participant experience with the Energy Performance Platform (EPP) and identify areas for improvement.

- Understand the participant experience with the EPP and document differences between participants that…
    - Used prior spreadsheet-based tools
    - Never used prior spreadsheet-based tools (first-year participants)
- Assess the level of participant engagement with the EPP
- Identify which EPP capabilities participants find most valuable
- Document improvements to the participant experience and level of engagement with the EPP from prior spreadsheet-based tools
- Estimate the impacts on participants' time resulting from the EPP compared to prior spreadsheet-based tools
- Identify areas where the EPP participant experience could be improved

Goal 7: Assess SEM DEI Goals and Accomplishments.

- What are the relevant DEI goals for C&I SEM?

    - How does each program define its DEI target businesses?
    - How are C&I SEM services designed to support the broader DEI goals for their respective programs?
- What progress have C&I SEM made towards their respective program DEI goals?
- How well are C&I SEM serving DEI target businesses in their respective sectors?
- How can C&I SEM increase participation by DEI target businesses in their respective sectors going forward?

Tasks

It is anticipated that the selected evaluator will be required to undertake the following major tasks and respondents should address these topics in their proposals. All tasks must handle Commercial and Industrial SEM separately, as distinct services.

Respondent should address each task in their technical proposal and describe their approach. Respondent does not need to belabor minor or administrative tasks like the kick-off meeting, reporting, or project management, but should instead focus their technical proposal on the core research tasks and methodologies and the prompts that are included in bold at the end of key tasks. In addition, proposals should identify any challenges the respondent foresees in implementing these tasks and recommend solutions. Lastly, proposals should indicate which research goals and objectives will be addressed by each evaluation task.

Task 1. Conduct Project Initiation Meeting and Develop Work Plan

The selected evaluator will host a virtual project initiation meeting with key Energy Trust, PMC, and SEM delivery staff to present and discuss the proposed evaluation goals and scope. They will provide a meeting agenda in advance and send out notes to meeting attendees afterwards. Discussion at the meeting will determine the final set of research questions to investigate. The meeting will also provide an opportunity for the selected evaluator to get acquainted with the program implementation teams and identify key staff responsible for different elements of SEM. Follow-up meetings may be needed to discuss specific topics in greater detail.

Based on comments and discussion during the project initiation meeting, the selected evaluator will develop a final work plan that will be the basis for all evaluation activities. The work plan will include the following topics:

- Evaluation goals and research questions
- Evaluation methodologies
- Sampling plans for interviews and surveys
- Recruitment and communications plan
- Schedule of tasks and deliverables

The selected evaluator will provide the draft work plan to the Energy Trust Evaluation Project Manager for review and incorporate feedback before finalization.

Deliverables:

- Kick-off meeting agenda
- Notes from kick-off meeting documenting decisions
- Draft and final work plan

Task 2. Review Program Documents and Data

Energy Trust will provide the selected evaluator with documents describing the implementation of C&I SEM services in 2023 and 2024, including manuals, plans, program budgets, reports, technical guidelines, user guides for the EPP, and other documents deemed relevant. In general, Commercial and Industrial SEM services are implemented separately by their respective programs, have important differences, and have separate documentation, except where the EPP is concerned, which is shared by both programs. Even in the case of the EPP, the two programs have different guidelines and workflows for how they use the platform. Documentation to be reviewed by the selected evaluator will include, but is not limited, to the following items:

- SEM delivery and coach guides
- Program SEM modeling guidelines
- Program implementation manual sections on SEM
- Energy Trust's Energy Performance Platform guidance document
- Energy Performance Platform User Guide (requires EPP system access, see Task 4)
- Program budget and action plans, including SEM highlights
- Program annual reports, including SEM highlights, goals, and achievements
- Program marketing plans and materials related to SEM

The selected evaluator will review these documents to gain a detailed understanding of Energy Trust's C&I SEM services, their background, structure, operations, progress towards goals, challenges, and adaptations.

Energy Trust will also provide the selected evaluator with data from its Project Tracking database to review and summarize. These data will include details of C&I customers that have participated in SEM services over time, including summary data about the organizations, sites, incentives paid, and SEM savings claimed by Energy Trust. Energy Trust will also provide Project Tracking data from the EB and PE programs, including at least five years of non-SEM capital and O&M measures completed by SEM participants. In addition, at least five years of Project Tracking data will be provided for eligible C&I customers that have never participated in SEM but have received incentives for capital measures from Energy Trust in recent years. Lastly, Energy Trust will provide a composite dataset of all C&I sites in Energy Trust's Oregon territory with basic site information and annual energy consumption. These site data will allow the population of C&I sites in Oregon to be enumerated and will be primarily used in Task 7.

For this task, the selected evaluator will explore and summarize Project Tracking data to better understand SEM participants and non-participants and the related SEM and capital measures described and savings claimed. The selected evaluator will also summarize SEM activity data, trends, savings, and progress towards the energy savings goals. This will include analyzing recent project volumes and energy savings for each program. The document review and summary analysis will provide useful context for the other tasks and evaluation findings and will serve as preparation for staff and customer interviews. Summaries of results will be expected for each program, by organization and facility size and type, utility service territory, and geographic region. The selected evaluator will summarize key findings from the document review and data summary in the evaluation report.

This task will also include securely receiving data, managing and merging datasets, creating new variables, categorizing sites, identifying SEM participants and non-participants, applying various filters, and summarizing and cross-tabulating data. The selected evaluator must ensure the confidentiality and security of all customer data throughout the project.

Deliverables:

- Section in evaluation report summarizing document review and data summary findings

Task 3. Interview Program Staff and SEM Delivery Contractors

The selected evaluator will conduct a mix of individual and small group interviews with EB and PE program staff and SEM delivery staff, organized by program, company, and role. It is anticipated that the selected evaluator will conduct interviews with around 20 of the nearly 50 individuals involved in the oversight, planning, management, delivery, and technical review of Energy Trust's C&I SEM services, including Energy Trust staff, PMC staff at TRC and Energy350, and SEM delivery contractor staff from AESC, ASK Energy, Strategic Energy Group, LD Consulting, and Burch Energy. In addition, the selected evaluator will interview staff from the third-party software developer of the SEM EPP that are involved in the development and support of the platform. Energy Trust will provide the selected evaluator with a list of C&I SEM delivery and EPP developer staff and provide introductions to facilitate the scheduling of interviews. It is anticipated that staff interviews will take from 45 to 60 minutes, depending on roles.

The interviews will review the contractor and delivery structure, how the SEM programs works, the participant experience with SEM, and identify areas for improvement. The selected evaluator will also probe for differences between the Commercial and Industrial SEM services as implemented in 2023 and 2024. Another area of focus for staff interviews is the development, launch, and staff experiences with using the Energy Performance Platform as both a back-office tool and customer engagement tool. The selected evaluator will explore the functionality of the EPP for both implementers and customers, the operational needs for the EPP and how well they are being met, and planned future enhancements. In addition, the interviews will cover data integration, time savings, and other potential benefits and challenges of using the EPP, particularly compared to the prior spreadsheet-based tools.

In addition, the selected evaluator will discuss the achievements and challenges of SEM in the C&I markets, market barriers, opportunities and remaining potential, the planned direction of SEM services, and anticipated changes. The staff interviews will also delve into the specific challenges in the aftermath of the pandemic, and how the EB and PE programs adapted their SEM services. The selected evaluator will document the lessons learned and what changes could be made to further adapt SEM services to the current market and societal conditions. The interviews will also cover how C&I SEM services are addressing and contributing to DEI goals in their respective programs. Ultimately, the staff interviews will help the selected evaluator better understand Energy Trust's SEM services and address the relevant research goals and objectives.

The selected evaluator will provide a draft staff interview guide to the Energy Trust Evaluation Project Manager for review and will incorporate any feedback before finalizing. The interviews should cover all applicable research objectives and questions that can be addressed by program staff. The interview guide should be somewhat modular, with certain questions tied to specific staff roles. The selected evaluator will analyze and summarize the interview results to identify common themes and extract important feedback and recommendations.

Proposal should describe respondent's approach to creating interview guides and conducting staff interviews.

Deliverables:

- Draft and final staff interview guide
- Section in evaluation report on methods and findings from staff interviews

Task 4. Review SEM Energy Performance Platform

The selected evaluator will conduct a thorough review of the use of the EPP for the C&I SEM programs. The EPP is a licensed cloud-based, proprietary, third-party owned platform used by Energy Trust for tracking its SEM participants' energy performance and management. The selected evaluator's access and use of the EPP, under Energy Trust's license, to perform the evaluation work for Energy Trust will be subject to additional terms and conditions, including a separate, required end-user license agreement. The selected evaluator, and its designated users, must sign and comply with this end-user license agreement. Subject to Energy Trust's requirements and the EPP terms of use, Energy Trust will provide the selected evaluator with access credentials and the evaluator's designated users can access the EPP solely for the limited purpose of performing this evaluation task for Energy Trust.

This task will include a review of the platform features available to customers and the C&I SEM delivery teams. The review will begin with the EPP's documentation, including the user guide (Task 2), online instructions, help files, and tutorial videos. For the EPP review, the selected evaluator will select a small, random sample of Commercial and Industrial SEM participants that have used both the prior spreadsheet tool and the EPP. Participant sites will be selected from the Project Tracking data provided in Task 2. For comparison purposes, Energy Trust will provide the selected evaluator with the spreadsheet-based energy tracking tools for the sampled participant sites from immediately prior to the EPP transition for review.

The selected evaluator will review the EPP's customer-facing features for the sample of participant sites, including site organization and navigation, content quality, information display, and functionality of different platform features. Platform usage statistics for sampled C&I participant sites will also be reviewed and summarized, to better understand how much participants use the EPP and which features they focus on. Next, the selected evaluator will review the features used by SEM delivery staff to manage participant site and energy model information, monitor participant energy opportunities and actions, monitor savings progress, forecast savings and incentives, calculate final energy savings and incentives, and manage access for customers and delivery staff. The selected evaluator will assess the capabilities of the EPP compared to the spreadsheet-based tools and to the operational needs expressed by C&I SEM management and delivery staff in the interviews (Task 3).

Lastly, the selected evaluator will select a larger random sample of participant sites for which they will extract data from the EPP to be reviewed and analyzed. The data extracts will include information on the site energy models, energy usage, savings estimates, incentivized capital projects, and the O&M projects and completed actions listed. The selected evaluator will review these data and use them to qualitatively assess the consistency and robustness of energy models and savings estimates produced by the EPP. This is not an impact evaluation, so this portion of the review should focus on identifying potential systemic issues and improvements that could be made to the EPP energy modeling and savings calculation processes. In addition, these data will be used to help quantify the remaining market and savings potential for SEM in Task 7.

The EPP review should help the selected evaluator understand the benefits and limitations of the EPP, for both SEM delivery and customer engagement purposes, and address the relevant research goals and objectives.

Proposal should describe respondent's approach to reviewing the Energy Performance Platform and comparing it to the old spreadsheet-based tools.

Deliverables:

- Signed end user license agreements for EPP access
- Section in evaluation report on methods and findings from EPP review

Task 5. Interviews with Recent Program Participants

The selected evaluator will conduct a series of in-depth interviews with representatives from a stratified random sample of organizations actively participating in C&I SEM in 2023 and 2024. The sample should be stratified by program, organization/facility size, organization/facility type, and geographic region to ensure representation from a variety of businesses enrolled in each program. In addition, the sample should contain representation from both long-time participants (with experience using the spreadsheet-based tools prior to the EPP) and relatively new participants (that have only used the EPP). The selected evaluator will ensure that the sample is adequately representative of participant organizations enrolled in C&I SEM and will provide reliable feedback with at least 15% relative precision (90% confidence) at the program level. In addition, the selected evaluator will need to closely coordinate with Energy Trust Evaluation staff to deduplicate the sampling and recruiting of C&I customers in parallel research efforts, including impact and process evaluations of the wider EB and PE programs that will be occurring over similar timeframes. Our intention is to strictly limit the number of organizations involved in multiple concurrent evaluation efforts and to minimize the effort required for customers if it is unavoidable.

For each participating organization selected, the designated Energy Champion and up to two additional members of the energy team will be identified and recruited for interviews. SEM delivery staff will provide the necessary contact information to the selected evaluator and will send out warm introductions about the process evaluation via email, using a script developed by the selected evaluator. Each identified contact will then be recruited to complete an individual interview or a group interview with other members of their organization. The selected evaluator may offer a completion incentive to increase the response rate, although they would be responsible for any required tax reporting.

The interviews will help the selected evaluator understand the participation process and participant experiences with SEM and the EPP, identify areas for program improvement, and address all relevant research goals and objectives. The selected evaluator will also explore the types of energy actions that participants have taken as part of SEM and the types of opportunities that remain and their savings potential, which will help inform the analysis in Task 7. In addition, the interviews will include basic firmographic questions to supplement the data that Energy Trust has on file. The interview questions may vary somewhat, depending on which program the customer participated in and whether they are a long-time or recent participant.

It is anticipated that the selected evaluator will complete interviews with a minimum of 60 recent C&I SEM participant organizations from the 2023 and 2024 program years. It is anticipated that each interview will last roughly 30-45 minutes. The selected evaluator will develop a draft SEM participant interview guide and provide it to the Energy Trust Evaluation Project Manager for review. They will incorporate feedback from Energy Trust before finalizing the guide. The interview guide should cover all applicable research objectives and questions that can be addressed by SEM participants. The selected evaluator will analyze and summarize the interview results to identify common themes and extract important feedback and recommendations. They will report findings for each program and summarize any relevant differences between strata.

Proposals should describe the respondent's sampling plan and include estimates of the overall sample size, anticipated response rate, and number of completed interviews. Proposals should also provide an example of how the sample might be stratified, once data on the stratification variables is provided. In addition, proposals should describe a plan for recruiting SEM participants.

Deliverables:

- Draft and final participant interview guide
- Section in evaluation report on methods and findings from participant interviews

Task 6. Interviews with SEM Non-Participants

The selected evaluator will conduct a series of in-depth interviews with C&I customers that have participated in the EB and PE programs in the past 5 years by completing incentivized capital energy efficiency projects, but have never participated in C&I SEM. For Commercial SEM, this definition may be extended to include organizations that participated in SEM in the past, but not for at least five years. First, eligible organizations will be identified from Project Tracking data (Task 2) from recent program participants representing organizations and facilities of a similar size to those currently enrolled in SEM. Once a pool of eligible C&I customers has been identified and enumerated, the selected evaluator will draw a stratified random sample of SEM non-participants for the interviews. The sample should be stratified by program, organization/facility size, organization/facility type, and geographic region to ensure representation from a variety of businesses enrolled in each program. The sample should include both C&I customers that have similar characteristics to current SEM participants and customers that have significant differences. The sampling goal will be to obtain reliable and representative feedback from C&I customers that are eligible for SEM services but have not yet taken advantage of them.

Similar to Task 5, the selected evaluator will need to closely coordinate with Energy Trust Evaluation staff to deduplicate the sampling and recruiting of C&I customers involved in parallel research efforts, including impact and process evaluations occurring on similar timeframes. For SEM non-participants, there should be no organizations involved in multiple concurrent evaluation efforts, to minimize evaluation fatigue and customer service impacts. The selected evaluator will work with Energy Trust and EB and PE PMC staff to review the sample of SEM non-participants and confirm that they represent organizations that have never participated in SEM but are eligible. If issues with sampled customers are identified, they will be replaced in the sample. PMC staff may also be able to identify which customers have been actively recruited for SEM but did not enroll. Next, PMC staff will help identify a knowledgeable representative from each sampled organization and provide the necessary contact information to the selected evaluator. PMC staff will also send out warm introductions to the customer contacts about the interviews via email, using a script developed by the selected evaluator. Each identified contact will then be recruited to complete an interview. The selected evaluator may offer a completion incentive to increase the response rate, although they would be responsible for any required tax reporting.

The interviews will help the selected evaluator understand and characterize eligible SEM non-participants, identify significant barriers to SEM participation, and determine how to convince them to participate in SEM or how SEM services could be adjusted to make them more enticing. In addition, the interviews will include basic firmographic questions to supplement the data that Energy Trust has on file, which will help the selected evaluator quantify the remaining market and savings potential for SEM services, which will help inform the analysis in Task 7. The interview questions may vary somewhat, depending on which program the customer participated in. Ultimately, the SEM non-participant interviews will help the selected evaluator better understand the reasons that some eligible C&I customers have not participated in SEM yet and address the relevant research goals and objectives.

It is anticipated that the selected evaluator will complete interviews with a minimum of 40 recent, eligible C&I customer representatives that have not participated in SEM. It is anticipated that each interview will last roughly 20-30 minutes. The selected evaluator will develop a draft non-participant interview guide and provide it to the Energy Trust Evaluation Project Manager for review. They will incorporate feedback from Energy Trust before finalizing the guide. The interview guide should cover all applicable research objectives and questions that can be addressed by SEM non-participants. The selected evaluator will analyze and summarize the interview results to identify common themes and extract important feedback and recommendations for each program.

Proposals should describe the respondent's sampling plan and include estimates of the overall sample size, anticipated response rate, and number of completed interviews. In addition, proposals should describe a plan for recruiting SEM non-participants.

Deliverables:

- Draft and final SEM non-participant interview guide
- Section in final report on methods and findings from interviews with SEM non-participants

Task 7. Analyze SEM Market and Savings Potential

The selected evaluator will conduct an econometric analysis to determine the remaining market potential and achievable savings potential for C&I SEM services in Oregon. First, the selected evaluator will review similar work recently completed by the PMCs, to identify important data sources, methodologies, assumptions, challenges, or findings from their experience. To complete the analysis, the selected evaluator must synthesize data and results from a variety of sources, described in prior tasks, for both SEM participants and eligible non-participants. In addition to the Project Tracking data obtained in Task 2, the selected evaluator will make use of the composite population data for C&I sites (Task 2), insights from the SEM delivery staff interviews (Task 3), and information about SEM participants (Tasks 4 and 5) and eligible non-participants (Task 6). These data will be used to develop an understanding of the following inputs into the market potential analysis:

- Number, square footage, and characteristics of organizations/facilities that have participated in SEM
- Types of actions taken by SEM participants, typical savings rates, and remaining energy opportunities
- Number, square footage, and characteristics of eligible SEM non-participant organizations/facilities
- Assessment of the portion of non-participant organizations/facilities and square footage that could feasibly participate in SEM services, if major barriers were removed

The selected evaluator may need to acquire additional third-party C&I site information for Oregon to supplement this analysis, but that will be determined once the available information has been assessed. The selected evaluator will use the available data, and reasonable assumptions, to develop a market potential model to determine the number of remaining eligible C&I customers, facilities, and square footage that have not yet participated in SEM. They will also assess and estimate the annual SEM electricity and gas savings potential remaining for both SEM participants (from additional actions) and eligible non-participants over the next 5, 10, and 20 years. For non-participant customers and facilities, the energy savings potential will be based on the SEM savings rates, actions, and opportunities observed in similar facilities that have participated in SEM, as well as an assessment of the feasible conversion rate if major barriers to participation were addressed. The results will be presented by program but also analyzed by organization/facility size, organization/facility type, utility territory, and geographic region.

Part of this analysis will involve assessing how well the EB and PE programs have served the population of eligible C&I organizations and facilities with SEM services. This information may be combined with the non-participant interviews in Task 6 to get a better understanding of which eligible customer groups have not been served well by C&I SEM services and how the EB and PE programs could modify their SEM services, or reduce barriers, to expand participation.

The selected evaluator will provide an analysis plan to the Energy Trust Evaluation Project Manager for review and will incorporate any feedback before beginning the analysis. The market and savings potential analysis should cover all applicable research goals and objectives that can be addressed with the available datasets.

Proposal should describe respondent's approach to conducting the analysis of SEM market and savings potential.

Deliverables:

- Draft and final analysis plan
- Section in evaluation report on methods and findings from SEM market potential analysis

Task 8. Reporting

After completing the Tasks 1 through 5, the selected evaluator will write up and deliver an interim memo, focusing on the assessment of the EPP, particularly research goals 5 and 6 and associated objectives. The interim memo will provide key findings, conclusions, and recommendations assessing the EPP in an abbreviated format, not to exceed 10 pages. Energy Trust will review the memo and provide feedback to be incorporated into the full evaluation report.

Once all the above research Tasks have been completed, the selected evaluator will provide Energy Trust with a draft and final evaluation report. The evaluation report will summarize the methods and findings from all evaluation activities and include a full set of well-informed conclusions, lessons learned, and recommendations. The report must address each of the evaluation's research goals and objectives.

The evaluation report must include, at a minimum, the following sections: executive summary, introduction, methods, findings, and conclusions and recommendations. The body of the report should highlight the key findings and focus on conclusions and recommendations related to the research goals. Findings and conclusions shall be based on the information collected by the evaluator and referenced in the report. The use of tables and graphs is recommended for material that does not lend itself well to narrative form, as well as for important findings. Where applicable, non-confidential data, phone conversations, sources, publications, and other media used in the report must be referenced and cited. It is anticipated that respondents or sources can be promised confidentiality in terms of attribution of responses. Detailed evaluation methods and less pertinent or less certain findings should be included in appendices to the main report. The final interview guides should also be included in appendices.

The evaluation report **should not exceed 30 pages** (excluding appendices). The draft report will be reviewed and commented on by Energy Trust, PMC, and SEM delivery staff, and other parties deemed appropriate by Energy Trust. Based upon these comments, the evaluator shall make revisions and deliver to Energy Trust a final version of the report. Achieving an acceptable final report may take more than one iteration between the selected evaluator and Energy Trust.

In addition to these reports, the selected evaluator will also prepare slides and present a summary of the evaluation findings at a public webinar hosted by Energy Trust. The selected evaluator will prepare the slides in advance of the webinar and provide to Energy Trust for review. The selected evaluator should plan for the presentation to take approximately 30 minutes with another 10 minutes allotted to answer questions from Energy Trust staff and stakeholders.

Deliverables:

- Interim memo on the EPP assessment
- Draft and final evaluation report
- Draft and final slides summarizing evaluation findings
- Deliver presentation of findings at Energy Trust webinar

Task 9. Project Management

The selected evaluator will manage all aspects of the project and ensure that it stays on schedule and within budget. They will host regular virtual meetings throughout the evaluation project to keep the Energy Trust Evaluation Project Manager and program staff informed of progress, and discuss upcoming research activities, data requests, issues that arise, and proposed solutions. In addition to these regular meetings, the selected evaluator will provide frequent project updates by email, especially if any problems or obstructions arise. The selected evaluator will proactively advise on ways to maximize the quality of the evaluation and interview response rates prior to, during, and post data collection.

The selected evaluator must submit monthly status updates by the 10th of each month, accompanying the monthly invoice, that present the following:

1. Current and total amounts invoiced to date compared to the approved budget
2. A summary of accomplishments during the previous month
3. Current month's activities and plans
4. Variances in the project schedule or budget, including any necessary explanations
5. If applicable, any issues or concerns to be addressed, with proposed solutions
6. Compliance with supplier diversity requirements, including the current and total amounts invoiced to date for certified subcontractors relative to total contract spending

Deliverables:

- Notes from regular conference calls
- Frequent updates during evaluation process
- Monthly status reports

Proposal Requirements

Proposals must be clear, complete, and concise. Pages must be numbered, sections must be clearly titled, and fonts must not be smaller than 11 point. Respondent's proposal must contain each of the elements listed below. Failure to include any required elements may result in the rejection of respondent's proposal. Please note the **24-page limit** for the proposal content. This page limit does not include the supplemental information requested—the work product example, resumés, insurance coverage information, conflict of interest disclosure, and representations page. These items should be included in attached appendices.

1. Proposal Content

Firm Qualifications

Proposals should provide an overview of the lead firm and any subcontractors. We encourage respondents to create a team of firms with specialized expertise to fill different project roles where applicable. Proposals should describe the respondent team's qualifications and experience doing similar work and identify specific aspects of the study where the respondent team's experience will be particularly relevant or important. **Not to exceed 3 pages.**

Staffing and subcontracting plan

Describe the project team structure, role of each key team member, subcontractor roles, and a management plan. We encourage respondents to create a team of firms with specialized expertise to fill different project roles. **Not to exceed 2 pages.**

Technical proposal

Provide a detailed project proposal for the evaluation, including proposed approach to the to the specific tasks identified in the "Tasks" section above, as well as respondent's approach to the evaluation overall. Respondents should follow the bolded proposal instructions in the Tasks section and refrain from simply repeating the study tasks. **Not to exceed 12 pages.**

Supplier diversity requirements

Proposals should indicate if respondent's firm or subcontractors are certified with the Certification Office for Business Inclusion and Diversity (COBID) of Oregon or the US Small Business Administration (SBA) as one or more of the following certifications that qualify under Energy Trust's Supplier Diversity Policy (SDP).

Qualifying COBID certifications:

- Minority Business Enterprise
- Women Business Enterprise
- Veteran Business Enterprise
- Service-Disabled Veteran Business Enterprise

- Emerging Small Business

Qualifying SBA certifications:

- Small Disadvantaged Business
- Women Owned Small Business
- Economically Disadvantaged Women Owned Small Business
- Business Development Program (8a)
- Veteran Owned Small Business
- Service-Disabled Veteran Owned Small Business
- Historically Underutilized Business Zone Certification (HUBZone)

It is required that a minimum of 15% of the value of any resulting contract be directed towards certified firms. This should be reflected in the staffing and subcontracting plan and budget proposal. Please describe how this requirement will be met and list all relevant certifications and certification numbers. **Not to exceed 1 page.**

Proposed schedule

Provide a schedule of major activities and deliverables listed in the Tasks section above, with approximate dates. The schedule should assume that Energy Trust will award a contract within 45 days of the proposal deadline and that a project kick-off meeting will be scheduled within two weeks of awarding the contract. The interim memo should be delivered to Energy Trust by March 31, 2025. The draft evaluation report should be delivered by July 31, 2025. A final report will be delivered within three weeks of having received all comments and edits on the submitted draft. These schedule assumptions may be reassessed once the project begins. **Not to exceed 1 page.**

Detailed budget proposal

Provide a detailed budget proposal, based on the proposed methods and staffing plan. Proposals should assume a time-and-materials contract with a “not-to-exceed” budget cap. Proposals should describe the underlying budget assumptions and any drivers of cost that can be modified without compromising the integrity of the evaluation.

It is anticipated that the budget for the scope described in this RFP **will be approximately $200,000**; however, Energy Trust reserves the right to revise its budget assumptions at any time. We ask that bidders propose a competitive budget for the project while being realistic about the scope that they can complete within that budget. If the proposed budget will exceed the $200,000 threshold, we will consider it, but ask that bidders provide a rationale for why it is necessary. In addition, we ask bidders proposing to exceed the budget threshold listed here to provide alternative budget scenarios where they could stay within the budget by making certain trade-offs—either by dropping tasks, reducing complexity, or reducing sample sizes and precision.

Proposals should summarize the budget in a table, breaking out the estimated hours and costs by task and by staff member. Please use the budget template provided below. Staff and subcontractors listed in the budget should be identified by name, with billing rates for each. **Not to exceed 2 pages.**

Budget template:

Staff Name	Title	Firm	Hourly Rate	Hours Per Task			Total Hours	Total Cost
				Task 1	Task 2	Task…		
Staff Member 1								
Staff Member 2								
Staff Member…								
Subcontractor 1								
Subcontractor…								
Total Hours Per Task								
Direct Costs								
Total Cost Per Task								

Diversity, equity, and inclusion (DEI) experience

Proposals should describe respondent's efforts and experiences in integrating diversity, equity, and inclusion into their business operations, both internally and externally, and their experience conducting culturally responsive research and evaluation work. Energy Trust seeks to contract with organizations that share its commitment to building a diverse, equitable, and inclusive workplace and business environment, and that apply a diversity and equity perspective to their work. Respondents must provide responses to each of the questions in **Appendix B**. **Not to exceed 3 pages.**

Data security and confidentiality

Proposals should provide any data security certifications (e.g., ISO-27001 or SOC 2) that are held and maintained by the respondent ***and*** any subcontractors engaged in the project. Energy Trust recognizes that these certifications can present significant barriers for some firms. If your organization or subcontractor does not hold any relevant data security certifications, please provide a brief description of the **systems, policies, and procedures** used to ensure that Energy Trust provided data and data collected throughout the evaluation are kept secure and confidential during fielding, data transfers, storage, and analysis. **Not to exceed 1 page.**

2. Work Product Example

Proposals should include **one past report** that showcases the respondent team's work on a similar project, as well as their data presentation and reporting capabilities. If needed, the names of people and organizations may be redacted from the report to allow sharing it. The work product example should be included as an appendix to the proposal; if the report is available on a public website, a working link to the report is preferred. **No page limit, but please keep materials to a minimum.**

3. Staff Resumés

Proposals should include resumés of all key team members, from the lead firm and any subcontractors who will be performing work. These should be included in an appendix to the proposal. **No page limit.**

4. Insurance Coverage Information

Energy Trust requires its contractors to maintain, at a minimum, workers compensation insurance, adequate commercial general liability insurance coverage, and automobile liability insurance. Cyber liability coverage may also be required. Provide a description of the insurance coverage provided by respondent for performing the impact evaluation work, including:

- Whether such coverage is on a “comprehensive” or “commercial” form
- Whether such coverage is on a “claims made” or “occurrence” basis
- All endorsements excluding coverage of any nature, if any
- All limits, including aggregate limits and the current remaining coverage amounts under those limits
- Effective date

This information should be provided in an appendix to the proposal. **No page limit.**

5. Conflict of Interest Disclosure

Respondent must disclose any actual or potential conflicts of interest respondent or its subcontractors may have with Energy Trust in its proposal. A conflict of interest is defined as any situation in which an individual or a member of their family or close business or personal acquaintance, is employed by Energy Trust or the OPUC, or may be reasonably construed to have a personal or financial interest in any business affairs of Energy Trust that may impair or appear to impair respondent’s objectivity in performance of the work in this solicitation or any other Energy Trust contract or situations in which respondent may have an unfair advantage.

The following are examples of actual or potential conflicts of interest that could require a mitigation plan or could be grounds for exclusion from competition in Energy Trust’s discretion:

- *A respondent has or had access to nonpublic information (e.g., budget, evaluation criteria, another contractor’s proprietary data, etc.) via the performance of another Energy Trust contract or subcontract that provides respondent with an unfair advantage in responding to this solicitation.*
- *A respondent on an evaluation project that would involve evaluating the performance of Program X has an existing subcontract with one of Energy Trust’s prime contractors for which it is paid to implement some portion of Program X.*

- *A respondent who has assisted Energy Trust or one of its current contractors in drafting the statement of work in a solicitation on which it now seeks to submit an offer will be automatically excluded from competing on that specific solicitation.*

Respondent's disclosure must specifically address any existing contracts between Energy Trust and the respondent, its staff, or any of its proposed subcontractors. If a potential conflict of interest is identified by the respondent, then the respondent should propose strategies to mitigate the conflict by submitting a mitigation plan which, if acceptable to Energy Trust, will become part of the contract terms if respondent is selected for award. If no conflict is identified by respondent, the respondent will explicitly provide such a statement in their RFP response. The determination of whether a conflict of interest exists is left to the sole discretion of Energy Trust. This information should be provided in an appendix to the proposal. **No page limit.**

6. Representations and Signatures Page

Respondent's proposal must contain the signature of a duly authorized officer or agent of the respondent company submitting the proposal. Respondent's duly authorized officer or agent shall sign ***Appendix A*** certifying to the representations stated on ***Appendix A.*** The signed page should be provided as an appendix to the proposal.

Proposal Selection Criteria

Proposals will be judged on the criteria listed below. As noted above, failure to meet any of the proposal requirements may result in the rejection of a proposal without scoring.

- Technical proposal
- Qualifications of the project team and staffing plan, including subcontractors (if applicable)
- Proposed budget
- Supplier Diversity Program eligibility
- Diversity, equity, and inclusion responses
- Data security and confidentiality
- Work product example

RFP Schedule & Administration

RFP Schedule

- July 15, 2024 — RFP issued
- July 24, 2024 — Intent to bid due
- July 24, 2024 — Questions/request for additional information due
- July 31, 2024 — Clarifications/question responses posted to website
- **August 16, 2024 — Proposals due**

Requests for Additional Information and Proposal Submission

Any questions and/or requests for clarification regarding this RFP, as well as stating intent to bid on the project, must be submitted via email to the contact named below by **July 24, 2024**. Responses to questions and requests for additional information will be posted on Energy Trust's website no later than **July 31, 2024**. Energy Trust cannot accommodate individual inquiries about the RFP. All questions must be submitted via email.

Stating intent to bid does not obligate a respondent to submit a proposal. Only electronically submitted proposals (in PDF form) will be accepted; faxed or print proposals will not. A signed letter of transmittal (cover letter) is required and should be scanned and submitted along with the proposal. All proposals must be received by 5 PM Pacific Time on **August 16, 2024**. Energy Trust will not be obligated to consider information received outside this time interval for the purposes of this RFP.

Please submit proposal to:

Cody Kleinsmith
Project Manager – Evaluation
Energy Trust of Oregon
Email: cody.kleinsmith@energytrust.org

Revisions to RFP

If it becomes necessary to revise any part of this RFP, an addendum will be issued by Energy Trust and will be posted on the website. Respondent should contact Energy Trust if they find any inconsistencies or ambiguities to the RFP. Clarification given by Energy Trust may become an addendum to the RFP.

Withdrawal and Modification of Proposals

Respondents may withdraw their proposal and submit a revised proposal prior to the response deadline. After the response deadline, respondent-initiated changes will not be accepted. Respondents may withdraw their proposal from consideration at any time.

Proposal Evaluation and Notification for Negotiations

Energy Trust will review the proposals as received and may initiate negotiations with the leading respondent(s).

RFP Governing Provisions

All submitted proposals are subject to the following additional provisions.

Right to Accept or Reject Proposals, Multiple Awards

Energy Trust reserves the right to make multiple awards, reject any and all proposals and to waive any nonconformity in proposals received, to accept or reject any or all of the items in the proposal, and award the contract in whole or in part as it is deemed in Energy Trust's best interest. Energy Trust may also choose to negotiate any of the details of proposals prior to contracting.

Confidentiality

Respondents shall clearly identify only those portions of their proposals that they do not want revealed to third parties and label such portions as “Confidential Information”. Except as required under law or for regulatory purposes Energy Trust will maintain confidentiality of such information. Energy Trust will not accept proposals or other documents that are marked to indicate the entire document is the confidential or proprietary information of the sender or that restricted handling is required. Normal business practices will be observed in handling proposal materials.

Ownership and Return of Proposals

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

No Verbal Addendums

No verbal agreement or conversation made or had at any time with any officer, agent, or employee of Energy Trust, nor any oral representation by such party shall add to, detract from, affect or modify the terms of the RFP, unless specifically included in a written addendum issued by Energy Trust.

Proposal Costs

Each proposal prepared in response to this RFP will be prepared at the sole cost and expense of the respondent and with the express understanding that there will be no claims whatsoever for reimbursement from Energy Trust.

Waiver of Claims

Respondent waives any right it may have to bring any claim, whether in damages or equity, against Energy Trust or its officers, directors, employees, or agents, with respect to any matter arising out of any process associated with this RFP.

Energy Trust Rights Reserved

Energy Trust reserves the right, in its sole discretion, to reject any or all proposals in whole or in part, to waive any minor irregularities or informalities in a proposal, and to enter into any agreement deemed to be in its best interests. In addition to any other enumerated reserved rights and/or options as stated in this RFP, Energy Trust may in its sole discretion do any one or more of the following:

- Determine which proposals are eligible for consideration for this RFP.
- Disqualify proposals that do not meet the requirements of this RFP, in the sole determination of Energy Trust.
- Negotiate with any respondent to amend any proposal.
- Select and negotiate and/or enter into agreements with respondent(s) who, in Energy Trust's sole judgment, are most responsive to the RFP and whose proposals best

satisfy the interests of Energy Trust, in its sole discretion, and not necessarily on the basis of price alone or any other single factor.

- Issue additional subsequent solicitations for proposals, including withdrawing this RFP at any time and/or issuing a new RFP that would supersede and replace this one.
- Vary any timetable or schedule, add or change any provisions discussed herein.
- Conduct any briefing session or further RFP process on any terms and conditions.
- Suspend or modify the RFP process at any time.
- Enter into relationships with more than one respondent.

Resulting Contract(s)

The selected respondent will be required to execute a written contract(s) with Energy Trust to perform the evaluation work. No award will be considered a commitment, and no obligations or legal relations shall exist between Energy Trust and the selected respondent until a final and binding contract has been executed by and between Energy Trust and the contractor. Time is of the essence with regard to this program evaluation work, and prolonged contract negotiations will not be undertaken. In general, Energy Trust strongly prefers contracts that are consistent with Energy Trust's standard terms and conditions; negotiations for such contracts can generally be completed quickly. In some cases, a few terms and conditions may need to be substituted or waived, in accordance with contract negotiations. Any party involved in these contract discussions can terminate negotiations at any time and for any reason. If it appears that contract negotiations are not proceeding in a timely manner, Energy Trust may opt to terminate the discussions and select another respondent.

The selected respondent will be required to sign Energy Trust's Utility Customer Information (UCI) confidentiality agreements to gain access to customers' energy consumption data, if that becomes necessary. There is a contractor version of the UCI confidentiality agreement, which can be found here, for reference:

https://energytrust.org/wp-content/uploads/2021/10/LGL_FM0205C.pdf.

There is also an individual version of the UCI confidentiality agreement, which can be found here, for reference:

https://energytrust.org/wp-content/uploads/2021/10/LGL_FM0205I.pdf.

Appendix A: Representations and Signature page

I, the undersigned declare that;

1. I am an authorized agent of the respondent and have authority to submit this proposal on behalf of the respondent.
2. The information provided in this proposal is true and correct to the best of my knowledge.
3. I have read this Request for Proposals in its entirety and agree unconditionally to all of its conditions and requirements.
4. The respondent has not directly or indirectly induced or solicited any other respondent to submit a false or sham proposal.
5. The respondent has not solicited or induced any other person, firm, or corporation to refrain from proposing.
6. The respondent has not sought by collusion to obtain for itself any advantage over any other respondent or Energy Trust.
7. The respondent’s proposal is genuine; not made in the interest of, or on behalf of, any undisclosed person, firm, or corporation; and is not submitted in conformity with an agreement of rules of any group, association, organization, or corporation.
8. I understand and accept that the approval or rejection of respondent's request is within the sole discretion of Energy Trust and that there is no legal commitment until all due diligence has been performed and a properly authorized contract has been duly and properly executed.
9. I authorize the representatives of Energy Trust to investigate the business financial credit history of respondent, its affiliates, and all associated partners, principals and management and authorize the release of all said information.
10. I agree that I will report immediately in writing to Energy Trust any changes to the information contained herein at any time while I am under consideration for funding.

The information contained in this proposal and any part thereof, including its exhibits, schedules, and other documents and instruments delivered or to be delivered to Energy Trust is true, accurate, and complete. This proposal includes all information necessary to ensure that the statements therein do not in whole or in part mislead Energy Trust as to any material fact.

Date:____

Authorized Signature:__________________________________

Name and Title:____________________________________
(please print)

Appendix B: Diversity, Equity, and Inclusion and Cultural Competence Questions for Respondents

Diversity, equity, and inclusion experience

1. Provide specific recent examples of activities, policies or investments that demonstrate how respondent promotes diversity, equity, and inclusion within respondent's company in the areas of
    a. recruitment, hiring, retention and promotion;
    b. training and professional development;
    c. industry workforce development and support.

Cultural competence in evaluation

Culture shapes each step of the evaluation process—from the conceptualization of a study and its research questions; to decisions on what data to collect, how to collect it, and how to analyze it; to the interpretation and presentation of results. Culturally competent evaluation requires researchers to recognize their own cultural assumptions about a research project, continually consider cultural and contextual factors in their research design, and implement methodological adjustments to account for diverse research contexts.

2. Provide your plan to apply culturally competent research practices in this project.

3. Provide a specific example of your team's experience applying culturally competent research practices when working with diverse customer groups; how did the research project's goals, methods, or outcomes change?