



Energy Trust of Oregon

Request for Proposals:

Dual Fuel Heat Pump Pilot Phase One Evaluation

Responses to Questions

September 18th, 2024

1. *Question: Task 2 requests analysis and summary of a variety of program-collected data on participants and their homes; disqualified participants; and invoices. To accurately estimate the level of effort required in this task, can Energy Trust please confirm the expected structure and completeness of these data? Should we expect a database of participant information?*

Answer: Data collected by the program referenced in Task 2 will be drawn from two sources. Information from application forms and phone screens will be transferred into an excel workbook (or similar) for each customer by CLEAResult. Information from on-site audits will be stored in individual PDFs. Information included in the latter which is relevant to Task 2 includes furnace, HVAC system, ductwork, and electric panel specifications as well as site photos.

2. *Question: In what format should we expect the invoice information?*

Answer: Invoices will be provided as scanned or electronically submitted PDFs. Individual invoice structures may vary by trade ally contractor.

3. *Question: The RFP mentions the evaluator should plan to collect missing participant data via participant surveys. What level of missing data should we expect? Is the PMC expected to collect all of the variables listed [in Task 2]?*

Answer: The PMC is expected to collect all of the listed information. Individual issues may have occurred with distinct customers resulting in missing data, but this is estimated to be true in less than 10% of respondents. Upon review of materials as part of Task 2 the evaluator may determine that evaluator led collection of missing participant data is unnecessary and, upon consultation with the Energy Trust evaluation project manager, may remove considerations to collect that information in the customer survey.

4. *Question: What is the target number of participant survey completes Energy Trust expects as part of this evaluation? Does Energy Trust require participants to take part in the evaluation surveys?*

Answer: Pilot participants are obligated to participate in the evaluation survey as part of their Energy Trust participation agreement conditions. The program has also had a hands-on approach with these customers which has included education that this is a pilot with attached research activities. Energy Trust would like to complete as many participant surveys as possible, though recognizes that recruitment is not always successful. We do not have a strict target for success and encourage evaluation bidders to realistically characterize their survey recruitment strategies and targets in their proposals.

5. *Question: What is the planned or actual geographic distribution of pilot participants?*

Answer: Goal installations for this pilot are distributed into the following areas. To further contextualize the service territories of Energy Trust’s funding utilities, please refer to our service area map available here:

https://www.energytrust.org/wp-content/uploads/2016/11/ServiceArea_External.pdf

Gas Utility Service Territory	Electric Utility Service Territory	Target Installation Quantity	Geographic Area(s)
NW Natural	Portland General Electric	50	Portland-Metro Area
Avista Natural Gas	Pacific Power	20	Southern Oregon/Klamath
Cascade Natural Gas	Pacific Power	20	Central/Eastern Oregon

6. *Question: Have installations begun? If so, when did they start? If not, when do you expect installations to begin?*

Answer: Yes, pilot system installations have begun. The earliest installations occurred in April 2024.

7. *Question: Does Energy Trust anticipate that all customers who qualify for the pilot will be selected for installation, or will there be an additional selection process after the audits to identify best fit candidates among those who qualify for the pilot?*

Answer: Energy Trust anticipates that all customers will be served on a ‘first-come first-serve’ basis. Candidates will not be disqualified after the audit so long as they fit all the pilot criteria.

8. *Question: By “non-pilot participant contractors”, we assume that Energy Trust is referring to contractors within Energy Trust’s network of trade allies that participate in other programs but are not participating in this pilot. Is that correct?*

Answer: “Non-pilot participant contractors” refers to residential HVAC contractors who are not participating in this pilot. This may include members of Energy Trust’s trade ally network who are engaged in other residential program offers as well as HVAC contractors who do not currently work with Energy Trust.

9. *Question: Can we leverage the contact information of participating contractors from other Energy Trust programs for the non-participant contractor interviews?*

Answer: Yes, so long as they are suitable fits for the research questions outlined in this evaluation. CLEAResult engaged with a small group of contractors during the design of the pilot. Many of these firms are not engaged in the pilot itself and may be recruited for non-participant contractor interviews.

10. Question: Can we include a cover letter within our proposal outside of the 24-page limit?

Answer: Yes, a cover letter may be included and will not count towards the 24-page limit for submissions.

11. Question: The RFP states that "The selected evaluator will review the notes from the three touch points for all 90 qualified customers, as well as any customers who were disqualified at various points throughout the process, to summarize findings related to the research objectives above." Does Energy Trust have an idea of how many customers will be in this group of disqualified customers?

Answer: Through current pilot activity, disqualifications have been occurring at a rate of approximately 2:1 to completed projects.

12. Question: The RFP states that the pilot will be "delivered in up to 90 homes that [among other criteria] have ducting and electric panels compatible with DFHP system requirements," and that "200-Amp electrical panels will be given preference over smaller panels which will be assessed for eligibility on a site-by-site basis." However, one of the research questions asks about "the cost of secondary infrastructure improvements (ducts, electric panels, etc.)." Does Energy Trust anticipate that secondary infrastructure improvements will be required?

Answer: Secondary infrastructure improvements may not be required for each household. However, due to the targeted nature of the pilot in low- and moderate-income brackets as well as technical differences in airflow needed between many heat pumps and existing gas furnaces, Energy Trust assumes that many households will need secondary infrastructure improvements to ensure their heat pump can operate effectively.

13. Question: Does the pilot have any participants yet (if so, how many)?

Answer: Yes, to-date 18 DFHP systems have been successfully installed.

14. Question: Has the pilot encountered significant issues with identifying and recruitment?

Answer: Identifying potential participants has not been an issue, as Energy Trust's past participant lists and utility partner low-income assistance programs have provided a large number of potential households. However, successful recruitment has been much more challenging, resulting in only 18 installations to-date. Energy Trust is currently working through many recruitment and communication strategies to continue to generate interest in participating in this pilot.

15. Question: Has the pilot been able to keep costs <\$12k per installation?

Answer: All installations to date except one have been below the \$12,000 cost cap.

16. Question: *Does the Pilot have regional specific (climate zone) sampling targets?*

Answer: See the response to Question 5 above. Installation targets are regionally distributed to our funding utility partners, which has a strong correlation with climate zones, but Energy Trust does not have climate zone specific targets.