Technical Analysis Study (TAS) Proposal

**<Insert Customer Property Name>**

**<Insert Site Address>**

*Proposal submitted to:*

Logo

Description automatically generated

**Energy Trust of Oregon**

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

*Prepared by:*

**<Insert ATAC Company Name>**

**<Insert ATAC Primary Contact>**

**<ATAC Company logo>**

*Submitted on:*

**<Insert Proposal Date>**

# Project Overview

Please provide the facility details requested in the table below.

|  |  |  |
| --- | --- | --- |
| **Facility Description** | | |
| **Customer Property Name** | |  |
| **Facility Type (e.g.: office, grocery etc.)** | |  |
| **Year Built** | |  |
| **Total Building Area (sq.ft.)** | |  |
| **Utility Provider** | | |
| **Electric Utility Provider** | |  |
| **Gas Utility Provider** | |  |
| **Proposed Study Format** | | |
| **Full TAS:** | **Streamlined TAS:** | **Public Purpose Charge Schools TAS (SB1149):** |
| **Timeline** | | |
| **Study time (in weeks)** | |  |
| **Estimated site visit date** | |  |
| **Estimated TAS delivery date** | |  |
| **Work Order recipient name** | |  |
| **Work Order recipient email** | |  |

*\* Please align text to the left and numbers to the right of each cell.*

# Proposed Measure(s) Summary

*\* Please copy the table below for each proposed measure.*

|  |  |
| --- | --- |
| **EEM X** | |
| **Existing condition description** |  |
| **Proposed measure description** |  |
| **Estimated kWh savings** |  |
| **Estimated Therm savings** |  |
| **Estimated cost ($)** |  |
| **Calculation methodology** |  |
| **Additional context** |  |

# Scope of Work

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

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

# Technical Analysis Study Fee

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

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

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

*\* Please align text to the left and numbers to the right of each cell.*

**Proposal evaluation criteria:**

* Potential to meet program cost-effectiveness
* Measure(s) complexity and scope of work
* Savings calcuation methodology
* Estimated savings relative to annual site usage
* Estimated incentive relative to TAS fee
* Data collection approach

# Submission Guidelines and Requirements

Submit TAS Proposal and supporting documentation to [EBcustom@trccompanies.com](mailto:EBcustom@trccompanies.com) and CC the Energy Advisor (if known).

TAS Proposal Template and ATAC Materials available here: <https://www.energytrust.org/allied-technical-assistance-contract-atac-materials-for-existing-buildings-program/>

# Appendix – TAS Proposal Check List

100E completed and signed by Participant

Utility bills included

Existing Condition provided for each measure

Proposed Measure Description provided for each measure

Estimated Savings in kWh and Therms for each proposed measure

Estimated Costs in dollars ($) for each proposed measure

A copy of the *ATAC Cost-Effectiveness Calculator Tool – Oregon and Washington (Excel)* workbook  
[Template available here](https://www.energytrust.org/wp-content/uploads/2022/06/BE_ATAC_CEC_Tool_v2025.1.xlsm)

Scope of Work provided

Technical Analysis Study Fee provided

Estimated Site Visit Date and TAS Delivery Date provided