Technical Analysis Study (TAS) Proposal

**<Insert Customer Property Name>**

**<Insert Site Address>**

*Proposal submitted to:*



**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:** [x]  | **Streamlined TAS:** [ ]  | **Public Purpose Charge Schools TAS (SB1149):** [x]  |
| **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 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