



Request for Proposal

Business Energy Waste Reduction Programs Implementation Contractor(s)

Program Bundles:

- #1 - Prescriptive, Custom, Specialty and Midstream**
- #2 - Small Business DI & Assessments**
- #3 - Small Business Trade Ally Program**
- #4 - Pilots**
- #5 - Multifamily**
- #6 - Marketplace**
- #7 – ENERGY STAR® & Smart Buildings**
- #8 - Grocer**

In support of:

Consumers Energy
“Energy Waste Reduction 2020-2022”
Electric and Natural Gas Energy Waste Reduction Programs

Consumers Energy seeks bids from qualified firms to serve as the Implementation Contractor for its Business Energy Waste Reduction Programs. Consumers Energy is issuing this Request for Proposal (RFP) for program delivery for 2020 and 2022 (program years). Program year 2022 is contingent on obtaining MPSC approval of an amended Plan to be submitted in 2019. This RFP consists of eight RFP bundles that Consumers Energy is issuing for its Business programs. Contractors who choose to respond to this RFP may respond to any or all of the RFP bundles, without splitting a bundle. If exceptions to the RFP requirements and terms/conditions are not stated in the bid it is assumed that all are accepted and will **NOT BE NEGOTIABLE** at a later date. All Contractors must be willing to follow Consumers Energy’s 2017 Code of Conduct.

Issued: November 30, 2018 Proposals Due: January 30, 2019
Program Delivery Public Launch: January 1, 2020

For more information and questions/answers visit: <https://consumersenergy.energy-rfp.com>

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1 INTRODUCTION

Consumers Energy Company (Consumers Energy), Michigan's second-largest electric and natural gas utility based in Jackson, Michigan, has received approval from the Michigan Public Service Commission (MPSC) for an Energy Waste Reduction (EWR) plan covering calendar years 2020-2021. The EWR plan was designed in response to the requirements legislated in the Clean, Renewable, and Energy Waste Reduction, Public Acts 295 of 2008 and 341 & 342 of 2016. Since 2009, Consumers Energy has met the energy savings targets each year and it is critical to continue to deliver on this commitment.

Consumers Energy intends to meet the energy efficiency challenge through the continuation and expansion of a comprehensive energy efficiency portfolio of programs. These programs will enable our customers to reduce their energy usage, lower their electric and natural gas bills and decrease their environmental impact. Consumers Energy has invested more than \$1 billion on EWR programs over a 10 year period during calendar years 2009-2018. Over that time period, Consumers Energy has established improved standards and targets with respect to expected performance levels and these are noted throughout this RFP. As such, we are interested to either maintain these levels or improve on them. Bidders will also note that minimum energy savings targets are listed but not an associated budget. This is intentional as we would like to gain greater insight into the bidders' costs to deliver the program(s) instead of providing a budget cap.

Consumers Energy is issuing this Request for Proposal (RFP) for the selection of an experienced third party EWR program implementation contractor team(s) for delivery of Business EWR programs targeted at both electric and natural gas customers. The time period for this solicitation is for calendar years 2020, 2021, and 2022. Bidders should note that future regulatory outcomes may result in altered energy savings and spending targets. As such, Bidders should be aware that targets or approaches specified in their RFP response may need to be renegotiated.

1.1 Summary of Solicitations

All Contractors are strongly encouraged to prioritize Michigan based staffing and partnership arrangements. They may choose to respond to one, several, or all of the defined bundles in this RFP, either independently and/or as a partnership with the primary contractor identified. The Contractor shall provide a separate proposal for each RFP (bundle) solicitation. Where an RFP bundle includes multiple programs, i.e. (Business RFPs #1, #2, #3), the Contractor must price separately and discuss their strategy, by task, for each program. **Bundles are not to be separated** – bidding must be for all programs contained in a specified bundle. Proposals can include an alternative structure approach within each bundle (combining programs). If proposed, this alternative structure must be in addition to the individual program proposal submission specified in the RFP. If requirements are not met, the proposal will be disqualified.

If the strategy for a particular task is the same for multiple programs within the RFP bundle, in the interest of time, the Contractor need not repeat the same details more than once, rather indicate which programs and task contains the appropriate discussion of response to the task. Pricing is to be identified by bundle and program in Appendix H. If the Contractor wishes to provide additional costs savings if awarded multiple bundles, that information shall be listed in a separate workbook in Appendix H. This option is in addition to the required individual bundle costs.

Contractors are requested to include, in detail, their strategy for Consumers Energy to achieve task objectives for the design, implementation, and marketing of each program bid on.

Consumers Energy is issuing the following Business program bundles:

1. Business RFP Bundle #1: Prescriptive, Custom, Specialty and Midstream
2. Business RFP Bundle #2: Small Business DI and Assessments
3. Business RFP Bundle #3: Small Business Trade Ally Program
4. Business RFP Bundle #4: Pilots
5. Business RFP Bundle #5: Multifamily
6. Business RFP Bundle #6: Marketplace
7. Business RFP Bundle #7: ENERGY STAR and Smart Buildings
8. Business RFP Bundle #8: Grocer

2 BACKGROUND & PROGRAM DESCRIPTIONS

2.1 Consumers Energy Overview

Consumers Energy is one of the nation's largest combination utilities, providing electric and natural gas service to approximately 2.9 million customers, representing more than 6.7 million of Michigan's 10 million residents, in all 68 counties of Michigan's Lower Peninsula. Appendix B contains a map of Consumers Energy's electric and natural gas service territories. To learn more about Consumers Energy, visit: consumersenergy.com.

TABLE 1. CONSUMERS ENERGY 2017 CUSTOMER COUNT AND ENERGY USAGE

Consumers Energy 2017 Customer Count and Energy Usage		
Electric		
Customer Class	Customer Count	Annual MWh Usage
GS	192,582	3,778,174
GSD	20,406	3,531,369
Total Sec Full Service	212,988	7,309,543
GP	1,785	1,296,118
GPD	1,637	10,444,161
GPTU	236	903,086
EIP	18	398,040
Total Pri Full Service	3,677	13,041,405
ROA-S	526	220,563
ROA-P	406	3,578,148
Total ROA	932	3,798,711
Total	217,597	24,149,659
Natural Gas		
Customer Class	Customer Count	Annual MCF Usage
GS-1	105,568	22,901,562
GS-2	23,272	28,416,697
GS-3	786	9,453,084
ST	1,367	17,180,650
LT	465	18,455,774
XLT	302	36,494,908
Total	131,759	132,902,675

Source: Quick Reference Report, K:\RAA_SBR\Gas\Quick Ref-Monthly\Gas Quick Ref Monthly 2018_2009.xlsx

Source: Quick Reference Report, K:\RAA_SBR\Electric\Quick Ref-Monthly\Electric Quick Ref_Monthly.xlsx

Source for Quick Reference Reports is SAP report Y_ECD_72000064

2.2 Consumers Energy Goals and Budgets

Consumers Energy's EWR Plan is designed to deliver cost effective energy savings. Consumers Energy 2020 - 2021 EWR program designs and other relevant information are detailed in the 2018 - 2021 Amended EWR Plan which was submitted to the MPSC March 2017 (Case Number U-18261) and subsequently approved January 23, 2018. This plan can be accessed under EWR Plans on the MPSC website (www.michigan.gov/mpsc). Contractors should closely review the proposed program designs detailed in the approved Plan filing and additional program requirements referenced in this RFP.

2.3 Bundle Descriptions, Historical Results, Targeted Savings, Design and Delivery

The following is a summary description of Consumers Energy bundles and programs specific to this RFP. Consumers Energy desires insight and innovation with respect to the programs outlined in this RFP. Contractors are encouraged to propose enhancements and modifications if a strong case can be made as to how these modifications are in the best interest of Consumers Energy and its customers.

Overall, Consumers Energy seeks to deliver energy savings in the most cost effective manner possible.

2.3.1 Bundle #1 – Prescriptive, Custom, Specialty and Midstream

Program Descriptions

Prescriptive

The Prescriptive program will provide incentives for energy-efficient products that are readily available in the marketplace and with savings opportunities for a large number of customers. The program will target measures for which energy savings can be reliably deemed, or calculated, using simple threshold criteria. A principal objective of this program element is to provide an expedited, simple solution for customers interested in purchasing efficient technologies that can produce verifiable savings.

Incentives will be fixed per measure. Examples of measures that can be deemed are many lighting measures, variable frequency drives, air compressors, and basic refrigeration measures are examples of measures that may require a simple calculation. In both cases, the incentive is pre-set rather than calculated based on the specific project. Measure application categories include:

- Lighting
- Lighting Controls
- Miscellaneous Electrical
- HVAC & Heating Equipment
- Tune-Up/Maintenance
- Building Automation System
- Advanced Air Distribution & Energy Recovery
- Laboratory
- Refrigeration
- Kitchen/Laundry
- Pipe and Ductwork Insulation
- Building Envelope and Insulation
- Domestic Water Heating
- Variable Frequency Drivers
- Compressed Air

Custom

The Custom program will provide financial incentives to customers to support implementation of high efficiency measures, which are available at the time of new equipment purchases, facility modernization, and industrial process improvement. The incentives will be customized based on calculated energy savings subject to a cap. The cap can be single tier (e.g., \$/kWh of first year savings) or can be multi-tiered with caps based on maximum incentive per kWh, minimum payback (e.g., buy-down to a 1 year payback), and maximum share of project cost. The advantage of a single tier cap is that customers and allies are better able to estimate the level of incentive in project evaluations. A multi-tiered cap may be considered if there are concerns that the program would be

overpaying for projects or attracting too high a level of free riders. It is often assumed that Business customers typically will make an investment without incentive if the payback is below two years. We have not consistently found this to be the case though, particularly with projects that entail significant perceived risk. Significant technical support will be an integral part of this program, in addition to financial incentives and project review. The Custom program will be responsible to deliver in excess of 10 percent of the electric portfolio savings and in excess of 40% of gas savings on annual basis.

Specialty

As a part of the Prescriptive and Custom program strategy, Specialty programs are designed to offer energy efficiency solutions to select market segments and specific customer needs. These Specialties offer solutions for businesses like incentives, focused outreach, technical training, and audits to help customers to improve energy efficiency and reduce demand. Their goal is to increase participation in the Prescriptive and Custom programs, delivering 20-30% of the savings.

As part of overall delivery of the Consumers Energy Business Energy Efficiency Program, the selected Contractor will be required to administer the existing Specialty programs as described below, and additionally any proposed specialty programs.

- Agriculture
 - The Agriculture program provides participating customers access to electric and natural gas, prescriptive and custom incentives through the Business Energy Efficiency program for both commercial and residential agricultural farm customers, operating a full time agricultural operation. These customers are defined as any customer operating an Agricultural products producing facility, including but not limited to, dairy farms, greenhouses, cash crop operations, orchards, fruit storages and grain drying facilities. Trade Allies are a primary component of the program design and are actively engaged in the program through targeted program outreach by program Energy Advisors.
- Large Business Advanced Lighting Controls
 - This program is designed to educate the market, demonstrate the technology and establish the infrastructure to support the next wave in lighting system controls, design and implementation. The Program objective is to transform the market from a 'widget/gadget' approach to a systems approach of lighting improvements that produce deep energy savings. The program will engage with advanced lighting control manufacturers and designers, as well as trade allies that have adopted this technology as a part of their business model. Close interaction with Design Lights Consortium and ENERGY STAR will be crucial to the operation of this program. Customers will be eligible for incentives through the Business Energy Efficiency Program.
- New Construction
 - This program captures energy efficiency opportunities through comprehensive efforts to influence building design and construction practices. The program works with design professionals and construction contractors to influence prospective building owners and developers to construct high-performance buildings that provide improved energy efficiency, systems performance, and comfort. Energy savings targets are

achieve by stimulating incremental improvements of efficiency in lighting, HVAC, and other building systems. Customers have access to incentives through the traditional prescriptive/custom path or for buildings that are pursuing LEED® Certification.

- Industrial Energy Programs - This program will ultimately help industrial customers identify energy saving opportunities through a variety of different energy systems offerings. This program is designed to make industrial customers aware of the assistance and incentives that are available for their given energy processes. In the larger scheme, it will also help industries integrate Energy Management Systems (EnMS) into continuous improvement processes to help reduce energy consumption, CO2 emissions, and operational costs while improving process efficiency. This program creates an umbrella of offerings that include the following program design elements or technology/process focuses: Industrial Energy Management (IEM), Compressed Air, Steam, and Water/Waste Water.
 - The Industrial Energy Management (IEM) element offering supports development of an EnMS: a set of organizational tools, systems and processes necessary for a holistic and systematic approach to achieve continuous improvement of energy performance, i.e. energy efficiency, use, consumption and intensity. Specifically, the program will provide technical assistance and financial incentives to customers implementing the necessary strategies for ISO 50001 certification or completing the ENERGY STAR Challenge for Industry and resulting energy saving actions.
 - The Compressed Air element is designed to ensure a stronger targeted outreach effort and increase contact with customers and Trade Allies that utilize compressed air measures. All the program's measure offerings are part of the program's portfolio of prescriptive and custom measures. In addition to increased utilization, it is important to grow the program by developing new measures which improve system efficiency both on the supply side (compressor room) and demand side (end users of compressed air) of the system.
 - The Steam focus is designed to identify energy saving opportunities and achieves energy savings by helping customers with large steam systems identify opportunities for improvement. This program is designed to help large commercial sites and manufacturers reduce energy consumption, CO2 emissions, and operational costs. This program is also intended to build awareness with trade allies, contractors and customers on the existence of measures for improving steam energy efficiency. The program is intended to take a holistic and systematic approach to steam plant equipment and operation by studying steam uses, the boiler plant equipment, water treatment, maintenance, and the condensate recovery system. This program element will provide technical assistance to optimize steam systems through an assessment and increased customer awareness about efficient steam system operation. This program is intended to create new applications to the current Business program through prescriptive and custom measures.
 - The Water and Wastewater element is designed to identify energy saving opportunities in municipal, industrial, and food processing sectors, and assists customers in achieving implementation of these opportunities. This offering will inform

customers of energy saving opportunities in treatment facilities and related collection and distribution infrastructure. Energy savings will be identified in process improvement with available incentives through the prescriptive and custom measures. A major objective of the program is to help make what are (often larger) custom process improvement incentives for water and wastewater an “easy sell”. It is common to have repeat participation with customers who have familiarity/experience with the custom incentive process, however new participants can benefit from having an advocate to help them understand the custom application process, which involves additional effort beyond that of a prescriptive application, and collaboration of our engineering team, the customer, and contractor.

Midstream

Consumers Energy is interested in utilizing a midstream avenue to capture savings from customers that are not currently participating in the traditional incentive program. Self-install customers continue to purchase lighting, HVAC and food service products from suppliers without investing in the most efficient products. The awarded contractor would be responsible for designing a program that would incentivize the suppliers for promoting a more energy efficient alternative while passing the discount onto the customer. This program will be responsible for a minimum of 8% of the portfolio’s electric savings and 8% of the gas savings as addressed in the table below.

Large Commercial Opt-Out/In Programs

Consumers Energy anticipates that the vast majority of business customers will elect to participate in Consumers Energy’s portfolio of programs as detailed in the preceding sections. However, eligible large business customers who prefer to “self-direct” and implement efficiency projects themselves can opt-out of the Consumers Energy’s efficiency programs. As such, these customers would be exempt from the applicable portions of the Consumers Energy EO surcharge. Eligible customers will design and plan their own projects, and also provide annual progress reports. Energy and/or demand savings resulting from customers self-directed programs count toward Consumers Energy’s overall portfolio savings goals. Eligible customers proposing a self-directed program are responsible for preparing and submitting to Consumers Energy, detailed plans, savings, costs and timelines. The Contractor will review the customer’s plans, plan amendments, plan terminations, and annual reports to the extent necessary to verify that necessary elements are included. Savings and other program elements will be tracked to meet Consumers Energy’s annual reporting requirements for the self-direct customers. Customers choosing to self-direct are not eligible to participate in Consumers Energy’s other EO programs and are also exempt from appropriate surcharges.

Opt-in programs allow customers that are ineligible to participate in EE programs to voluntarily opt-in and pay the full surcharge. Once opted-in a customer cannot opt-out. The Contractor is required to approve opt-in requests.

As part of overall delivery of Consumers Energy Business Energy Efficiency Program the selected Contractor will be required to administer the Opt-Out/In programs. The contractor will be asked to approve enrollments, and review plans and reports submitted by self-direct customers, process applications, process MPSC data requests, and enter self-directed claimed savings into the comprehensive data tracking system. While no specific budget is allocated directly for this component, it is expected that the contractor will support this function through directing a small

percentage of funds from the other program budgets. Overall, it is anticipated that the time and effort involved with this task will be very minor, currently accounts for less than one percent of the annual savings portfolio.

Opt-Out Programs

1. Electric Self-direct program (In 2018 five (5) customers participated)
2. Large Gas Opt-Out program (In 2018 zero (0) customers participated)

Opt-In Programs

1. Self-Generation Rate GSG-2 (In 2018 one (1) customer participated)
2. Street Lighting Rates GUL/GML (4 customers participated)

Targeted Savings and Historical Program Results

Overall, Consumers Energy would like Contractors to present a strategy to achieve at least the minimum savings targets detailed below, and preferably 110% or greater of the stated savings. Note, savings may shift between programs within this bundle.

TABLE 2. BUSINESS RFP BUNDLE #1: TARGETED SAVINGS

	Annual Savings			Lifetime Savings		
	2020	2021	2022	2020	2021	2022
Prescriptive MWH	294,726	330,480	330,480	4,126,164	4,626,720	4,626,720
Prescriptive MW	46.24	53.21	53.21	-	-	-
Prescriptive Mcf	487,406	491,419	491,419	6,579,981	6,634,157	6,634,157
Custom MWH	40,025	44,880	44,880	704,440	789,888	789,157
Custom MW	5.65	6.5	6.5	-	-	-
Custom Mcf	374,928	378,015	378,015	7,123,632	7,182,285	7,182,285
Midstream MWH	29,110	32,640	32,640	291,100	326,400	326,400
Midstream MW	4.51	5.19	5.19	-	-	-
Midstream Mcf	74,986	75,603	75,603	889,832	907,236	907,236
Total MWH	363,861	408,000	408,000	5,121,704	5,743,008	5,743,008
Total MW	55.05	58.59	58.59	-	-	-
Total Mcf	937,320	945,037	945,037	14,603,445	14,723,678	14,723,678

The table below is for informational purposes and provides historical data specific to the Bundle #1:

TABLE 3. 2017 ANNUAL SAVINGS, PARTICIPATION COUNT

Program	MWh	MW	Mcf	Participation (Applications)
Prescriptive	236,972	33.93	926,667	5,477
Custom	25,677	4.01	414,472	47
Midstream	5,000	-	-	320
Total	267,649	37.94	1,341,139	5,844

Program Design and Delivery

Reference sections [3.4](#) and [3.5](#) for required Program Design and Delivery. In addition, review and address bundle specific items below:

1. Consumers Energy will provide Corporate Account Managers (CAMs) to directly market energy efficiency programs to assigned accounts. CAMs are assigned to 623 of Consumers Energy largest gas and electric customer accounts that will be targeted. Consequently, CAM assigned accounts represents a majority of the C&I electric and gas load. The role of the CAM is critical to managing the relationship with the customer and the image of Consumers Energy. Consumers Energy will be utilizing CAMs to promote all program offerings to these large assigned accounts in order to improve existing customer relationships. The Contractor should be respectful of that relationship working closely with CAMs to foster a strong positive account manager presence. CAMs will coordinate with the Contractor if additional support is needed. The Contractor should coordinate all correspondence with these assigned customers and notify the CAM of information requests, complaints, requests for site visits, and other EWR program support.
2. For all programs in Bundle 1, contractors will be responsible for the following tasks, which are subject to change:
 1. The design and other up-front program development and marketing tasks
 2. Application design, program advertising, etc. to support assigned customers through initial application fulfillment
 3. All implementation and marketing activities for the unassigned C&I customers
 4. Application fulfillment and technical support to the corporate account managers (CAMs) on an as needed basis
 5. Application reception, review, and payment processing
 6. Incentive calculation
 7. Project monitoring, progress tracking
 8. Post-inspections
 9. Provide key technology expertise
 10. Trade ally relationship development
 11. Measurement and verification

2.3.2 Bundle #2 – Small Business Direct Install & Assessments

Program Description

Small Business Program Summary

Consumers Energy has supported Michigan communities with energy efficiency programs since 2009, including the Consumers Energy Small Business Energy Efficiency Program(s). The emphasis on Small Businesses throughout the Owner's territory has been a natural extension of the company's successful energy waste-reducing efforts. The Small Business Portfolio of programs have excelled at serving this hard-to-reach sector, providing support for small businesses across Michigan not limited to nonprofits, shelters, houses of worship, community organizations, and historical buildings. Small business customers are defined as customers with annual consumption at or below 400,000 kWh and 6,000 Mcf.

This customer segment is particularly important to Consumers Energy, as small business owners have limited resources; they are typically more difficult to engage due to limited time, energy education, and financial resources to invest in energy waste reduction efforts. Participation is made simple and enjoyable by providing free energy assessments and direct install measures, as well as energy efficiency education through the following; Small Business Direct Install (SBDI) and Small Business Assessment (SBA) Programs.

Small Business Direct Install

The Small Business Direct Install (SBDI) program is one step of the energy efficiency journey for small business customers, which aims to decrease barriers faced by small businesses in pursuing energy-efficient equipment. In this program, staff identifies opportunities for upgrades and complete the installations on-site to limit the amount of time, knowledge and effort required by the customer and at no cost.

The program shall target potential participants through multiple channels, including leads generated through but not limited to Consumers Energy's Small Business Assessment program (described below), cold calls, and targeted marketing efforts, etc. The direct install equipment may include but not limited to; LEDs (both screw-in and tube in limited quantities), LED exit signs, pre-rinse sprayers, faucet aerators, pipe wrap for hot water heaters, programmable and smart thermostats, etc. During the installation effort, staff shall provide energy education of the products installed and next steps to continue their energy efficiency journey through other program offerings. Consumers Energy claims prescriptive savings for direct install measures from corresponding measures in the Michigan Energy Measures Database (MEMD).

Small Business Assessments

The Small Business Energy Assessment Program (SBA) provides another point-of-contact along the energy efficiency journey for small business customers. Implementation staff shall perform on-site assessments that shall include a visual inspection of the business and a customized assessment report that provides energy efficiency education. The customized assessment report shall be simple, easy to read, and provide concise recommendations on ways to help the business save money on energy bills. The report shall be delivered at the completion of the visit or emailed to the customer within 2 business days. Most importantly, the on-site assessment shall be delivered without interrupting business operations while providing an excellent customer experience.

The customizable assessment report shall use data points entered during the assessment and entered into a web-based intake tool to create a personalized report for each customer. The analyst discusses the report and recommendations with the customer focused on educating the business based on the assessment findings and providing clear and concise next steps on the small business energy waste reduction journey. To ensure reasonable productivity, assessments should result in driving, at minimum, 50% participation into other business programs.

Targeted Savings and Historical Program Results

Overall, Consumers Energy would like Contractors to present a strategy to achieve at least the minimum savings targets detailed below, and preferably 110% or greater of the stated savings.

TABLE 4. BUSINESS RFP BUNDLE #2: TARGETED SAVINGS

	Annual Savings			Lifetime Savings		
	2020	2021	2022	2020	2021	2022
Small Business DI MWh	26,000	26,000	26,000	360,000	360,000	360,000
Small Business DI MW	4.0	4.0	4.0	-	-	-
Small Business DI Mcf	5,500	5,500	5,500	43,500	43,500	43,500

The table below is for informational purposes and provides historical data specific to the Bundle #2:

TABLE 5. 2017 ANNUAL SAVINGS, PARTICIPATION COUNT

Program	MWh	Mcf	MW	Participation
Small Business DI	9,417	16,348	1.7	1,896

Program Design and Delivery

Reference sections [3.4](#) and [3.5](#) for required Program Design and Delivery. In addition, review and address bundle specific items below:

1. This program is used as a lever for the entire C&I portfolio of programs, therefore, for modeling purposes please build a plan that includes a creative measure list, is cost effective, and supports high savings for 5,000 Direct Installs and 5,000 Assessments.
2. Describe your existing intake tool or summarize your proposal and development and maintenance of a new intake tool. The tool shall provide an automated way to capture direct install items and automated reporting.

2.3.3 Bundle #3 – Small Business Trade Ally Program

Program Description

Small Business Trade Ally Program

Consumers Energy has supported Michigan business communities with energy efficiency programs since 2009, including the Consumers Energy Small Business Energy Efficiency Program(s). The emphasis on Small Businesses throughout the Owner's territory has been a natural extension of the company's successful energy waste-reducing efforts. The Small Business Portfolio of programs have excelled at serving this hard-to-reach sector, providing support for small businesses not limited to nonprofits, shelters, houses of worship, community organizations, and historical buildings. Small business customers are defined as customers with annual consumption at or below 400,000 kWh and 6,000 Mcf.

The Small Business Trade Ally Program (SBTAP) is designed to be "turn-key," providing all aspects of project implementation, thus making it easier for small business customers with limited time and resources to participate. SBTAP is a trade-ally-driven program in which trained and approved trade allies reach out to small business customers, provide proposals that specify project needs, install equipment, and provide program application submittals. The trade ally proposal shall include a detailed explanation of each proposed improvement, an overview of projected energy savings and cost.

The incentives for this program are provided directly to the trade-ally, with the intention that the savings are passed on to participants through lowered project costs and the achievement of long-term energy savings. Incentives will offset up to 100% of the installation costs, with a cap of \$10,000 maximum utility contribution per premise. Lighting and other high efficiency technologies can be offered in this program that deliver energy savings cost effectively. Energy bill reductions are likely to provide a positive cash flow for participants who decide to finance their portion of the installation costs. Typical measures include conversion of incandescent and standard fluorescents to high performing LEDs, exterior lighting, occupancy sensors, and LED exit sign retrofit kits, etc. We would consider proposals for a gas program which may include typical measures including but not limited to furnace and boiler replacement, water heaters, tune-ups, smart thermostats, etc.

Targeted Savings and Historical Program Results

Overall, Consumers Energy would like Contractors to present a strategy to achieve at least the minimum savings targets detailed below, and preferably 110% or greater of the stated savings.

TABLE 6. BUSINESS RFP BUNDLE #3: SMALL BUSINESS TRADE ALLY PROGRAM

	Annual Savings			Lifetime Savings		
	2020	2021	2022	2020	2021	2022
Small Business Prescriptive MWH	26,000	26,000	26,000	360,000	360,000	360,000
Small Business Prescriptive MW	4.0	4.0	4.0	-	-	-

The table below is for informational purposes and provides historical data specific to the Bundle #3:

TABLE 7. 2017 ANNUAL SAVINGS, PARTICIPATION COUNT

Program	MWh	MW	Participation (Applications)
Small Business Prescriptive	42,230	5.4	2,230

Program Design and Delivery

Reference sections [3.4](#) and [3.5](#) for required Program Design and Delivery. In addition, review and address bundle specific items below:

2.3.4 Bundle #4 – Pilots

Program Description

Pilots

Consumers Energy seeks to implement emerging technologies and applications that would support new program development, and more effective delivery of energy efficiency services to customers and support a more diverse business EWR portfolio. Pilots can take various shapes, and can range widely in scope, cost, and schedule. Not all pilots will be successful, as such, the ability to determine failure quickly and move on, is desirable.

New pilot initiatives include:

- Developing new “strategic” programs to round out the existing EWR portfolio, and support entry into new program opportunities as they are developed via design, marketing, technology, etc.
- Identify new and innovative technologies, applications and new target market niches.
- Strengthening existing programs via new/exploratory program improvements and/or delivery.

Targeted Savings and Historical Program Results

Pilot programs are funded as 5% of the overall Business EWR portfolio budget.

Program Design and Delivery

Reference sections [3.4](#) and [3.5](#) for required Program Design and Delivery. In addition, review and address bundle specific items below:

1. Provide a list of at least three (3) pilot ideas and include measures involved, implementation timeline, marketing strategy and plan, budget, expected savings, evaluation and subsequent transition to a program. The ideas provided should include a minimum of one electric savings pilot and one gas savings pilot, and no more than one behavioral pilot idea.
2. Currently, residential and business pilots are managed separately. Describe how you would incorporate synergies between residential and business pilots, and the potential benefits.
3. Developing an idea into a functional program can be a challenge, describe the process you would employ to manage pilots from ideation through closure. Include processes, deliverables, strategies, tactics, etc. that you would employ at each stage.
 - Ideation
 - Business case
 - Pre-Launch
 - Launch
 - Pilot management
 - Results, analysis and summary
 - Closure (i.e. retirement or graduation)

4. While there is uncertainty and a need for flexibility in pilot programs, describe the best means for structuring implementation costs of a pilot project other than on a Time and Material basis.
5. Provide a minimum of one example of a pilot you have launched that demonstrates “out of the box”, innovative thinking. What was the outcome?
6. Include information on business pilots you have implemented, including number of pilots, and how many of those resulted in new EWR programs, measures, and savings.
7. Provide tactics employed to stay informed of newest industry trends, challenges and research.
8. Describe how you would identify the need for and maintain a pipeline of potential pilots over the period of the contract and details on how you would address the following:
 - Assessing current business portfolio to prioritize pilots to fill portfolio gaps
 - Developing and maintaining a pipeline for pilots based on portfolio and business needs
 - Creation of 2-4 approved new pilot business cases annually per the established/developed process
 - Describe the pilot ideation scoring methodology you employ, if not included above
 - Describe how you will conduct results analysis and work with evaluators to determine pilot success, if not included above
9. In conjunction with the pipeline, it is anticipated that there will be several pilots running concurrently. Beyond the requirements in Section 5, outline your approach for pilot staffing. Will pilots staff provided be specializing in pilots or part of a portfolio implementation team?

2.3.5 Bundle #5 – Multifamily

Program Description

Multifamily

The Consumers Energy Multifamily program offers an integrated service offering incorporating Residential, Commercial and Income Qualified. The program will consist of both direct install measures and prescriptive or custom efficiency improvements for residential in-unit and commercial common areas for the both the market rate and income qualified customer segments.

One component of the Consumers Energy Multifamily program is designed to offer property owners a turnkey service for helping residents reduce energy use in their living units through the direct installation of various energy saving measures. The direct install service is provided at no cost to the property owners or the tenants. The Multifamily program also provides incentives for prescriptive, custom, and direct install measures to encourage property owners and managers to retrofit individual units and common areas throughout the property.

The Multifamily program also provides direct install energy efficiency products, increased prescriptive and custom incentives, and educational services for income qualified properties where 66% or more of the tenants are at or below 200% of the federal poverty level. In addition to income qualified properties, the program seeks to serve the entire affordable housing sector and will work closely with the Michigan State Housing and Development Authority, Michigan Community Housing Commissions, and other non-profit agencies throughout the state to leverage existing state and federal funding to provide comprehensive energy efficiency upgrades. The program's collaborative approach of engaging and cooperating with local agencies and communities fosters greater public awareness towards adopting higher energy efficiency practices in the income qualified multifamily sector.

An important objective of the Multifamily program, including sub-program components, is to develop strong customer awareness of the multiple benefits provided by energy efficiency programs by demonstrating the correlation between the energy savings benefits of installed energy efficiency measures, and the non-energy benefits customers receive when they participate in the Consumers Energy Multifamily program.

Targeted Savings and Historical Program Results

Overall, Consumers Energy would like Contractors to present a strategy to achieve at least the minimum savings targets detailed below, and preferably 110% or greater of the stated savings.

TABLE 8. BUSINESS RFP BUNDLE #5: MULTIFAMILY

	Annual Savings			Lifetime Savings		
	2020	2021	2022	2020	2021	2022
Multifamily MWH	5,775	6,468	6,468	129,048	134,911	134,911
Multifamily MW	1.0	1.0	1.0			
Multifamily Mcf	129,900	129,900	129,900	1,752,722	1,752,722	1,752,722
IQ Multifamily MWH	2,732	3,060	3,060	34,882	39,068	39,068
IQ Multifamily MW	0.4	0.4	0.4			
IQ Multifamily Mcf	42,875	42,829	42,829	493,078	492,028	492,028
TOTAL MWH	8,507	9,528	9,528	163,930	173,979	173,979
TOTAL MW	1.4	1.4	1.4			
TOTAL Mcf	172,776	172,776	172,776	2,245,800	2,244,750	2,244,750

TABLE 9. 2017 ANNUAL SAVINGS, PARTICIPATION COUNT

Program	MWh	MW	Mcf	Participation (Applications)
Multifamily	7,749	0.9	126,116	566
IQ	2,147	0.2	31,403	153
TOTAL	9,896	1.1	157,519	719

Program Design and Delivery

Reference sections [3.4](#) and [3.5](#) for required Program Design and Delivery. In addition, review and address bundle specific items below:

1. Describe your approach and strategy for recruiting and training local, State, Federal and non-profit agencies that will assist with the income qualified component of the program. Summarize the profiles of the most critical organizations and agencies who you consider the most important partners for program success. Summarize your recruitment, training, and management process for these organizations.

2.3.6 Bundle #6 – Marketplace

Program Description

Marketplace

This program is designed to develop a scalable and innovative, self-service small business marketplace that could acquire cost-effective savings from hard-to-reach small businesses, especially those in rural areas, while serving a gap-filling role in the commercial portfolio, without diluting the impact of the existing small business programs. The marketplace provides customers an instant incentive while purchasing energy efficient products in a convenient online one-stop shopping experience. This user-friendly marketplace is primarily marketed digitally via email and targeted social media ads, with high-converting inbound traffic from blogs and downloadable content.

Targeted Savings and Historical Program Results

Overall, Consumers Energy would like Contractors to present a strategy to achieve at least the minimum savings targets detailed below, and preferably 110% or greater of the stated savings.

TABLE 10. BUSINESS RFP BUNDLE #6: MARKETPLACE

	Annual Savings			Lifetime Savings		
	2020	2021	2022	2020	2021	2022
Online Marketplace MWh	2,500	3,000	3,500	25,000	30,000	35,000
Online Marketplace MW	0.3	0.3	0.3	-	-	-
Online Marketplace Mcf	20,000	25,000	30,000	280,000	350,000	420,000

TABLE 11. 2018 ANNUAL SAVINGS, PARTICIPATION COUNT

Program	MWh	Mcf	MW	Participation (Orders)
Online Marketplace	1,500	20,000	0.15	1,200

Program Design and Delivery

Reference sections [3.4](#) and [3.5](#) for required Program Design and Delivery. In addition, review and address bundle specific items below:

1. An online marketplace provides customers instant incentives on measures such as smart thermostats, lighting and other energy efficient products. What measures do you propose including and what is the product cost?
2. How will you manage the marketplace to keep competitive product pricing?
3. Describe how the customer validation process will work before purchases are complete.

2.3.7 Bundle #7 – ENERGY STAR® & Smart Buildings

Program Description

ENERGY STAR Program

The ENERGY STAR program is designed to assist organizations of any business type according to ENERGY STAR's guidelines in developing an energy management plan that helps direct their efforts to become more energy efficient. The program should utilize whole building tools provided by ENERGY STAR, including but not limited to, Portfolio Manager, Target Finder, and Certification. Customers will receive various services through the program, however at a minimum they will receive an assessment for strategic implementation of improvement measures that use a mix of low cost/no cost measures, industry best practices, and capital projects. Contractor should propose innovative program design solutions for incorporating ENERGY STAR into the program design and delivery strategy. At a minimum, the program must achieve 400 buildings benchmarked and 150 ENERGY STAR certifications annually.

Smart Buildings Program

Designed to assist business customers with existing building commissioning activities to reduce energy use, the program will offer a retro-commissioning audit and consulting services to customers with energy management systems that require calibration and optimization. The audit will focus on low cost/no cost measures that customers will be required to implement and obtain quick energy savings. The report will also detail capital energy efficiency improvements as well as best practices for all energy related equipment within the facility. Contractor should present multiple delivery strategies for different customer segments, sizes and sectors.

Targeted Savings and Historical Program Results

Overall, Consumers Energy would like Contractors to present a strategy to achieve at least the minimum savings targets detailed below, and preferably 110% or greater of the stated savings.

TABLE 12. BUSINESS RFP BUNDLE #7: SMART BUILDINGS

	Annual Savings			Lifetime Savings		
	2020	2021	2022	2020	2021	2022
Smart Buildings MWh	2,000	2,250	2,500	10,000	11,250	12,500
Smart Buildings MW	0.2	0.2	0.2			
Smart Buildings Mcf	11,500	12,000	12,500	57,500	60,000	62,500

TABLE 13. 2017 ANNUAL SAVINGS, PARTICIPATION COUNT

Program	MWh	Mcf	Participation
ENERGY STAR	n/a	n/a	118 (certifications)
Smart Buildings	284	3,003	7 (applications)

Program Design and Delivery

Reference sections [3.4](#) and [3.5](#) for required Program Design and Delivery. In addition, review and address bundle specific items below:

1. Describe how your approach will leverage national organizations and associations and your partnerships with those organizations, i.e. ENERGY STAR. Explain how these relationships will be leveraged to market the programs and educate customers.
2. Summarize the deliverables that will be provided to the customers. What products, services or offerings will be provided and what tangible items will the customer receive from participation in the program.
3. Detail how you suggest increasing customer awareness of Consumers Energy role in sponsoring the program and providing Consumers Energy increased recognition and attribution during customer satisfaction surveys.

2.3.8 Bundle #8 – Grocer

Program Description

Grocer

Consumers Energy Grocer pilot program aims to evaluate the effectiveness of a specialized assessment approach to reach an underserved market segment. Program staff perform assessments, prioritize upgrade recommendations, help customers solicit and evaluate quotes from trade allies, and promote measure adoption.

Targeted Savings and Historical Program Results

Overall, Consumers Energy would like Contractors to present a strategy to achieve at least the minimum savings targets detailed below, and preferably 110% or greater of the stated savings.

TABLE 14. BUSINESS RFP BUNDLE #7: GROCER

	Annual Savings			Lifetime Savings		
	2020	2021	2022	2020	2021	2022
Grocer MWH	5,500	6,000	6,500	55,000	60,000	65,000
Grocer MW	0.7	0.8	0.9	-	-	-
Grocer Mcf	20,000	25,000	30,000	280,000	350,000	420,000

TABLE 15. 2018 ANNUAL SAVINGS, PARTICIPATION COUNT

Program	MWh	Mcf	MW	Participation (Assessments)
Grocer	5,000	-	0.7	50

Program Design and Delivery

Reference sections [3.4](#) and [3.5](#) for required Program Design and Delivery. In addition, review and address bundle specific items below:

1. Contractors are responsible for program outreach, marketing, and implementation; however, incentive processing will be a function of the Prescriptive and Custom programs.
2. Summarize the deliverables that will be provided to the customers. What products, services or offerings will be provided and what tangible items will the customer receive from participation in the program.

3 SCOPE OF WORK

The following section details the major task categories for each of the programs included in this RFP. All programs are designed to address and integrate both electric and natural gas energy efficiency measures and incentives. Where an RFP bundle includes multiple programs, the Contractor must discuss their strategy, by task, for each program. If the strategy for a particular task is the same for multiple programs within the RFP bundle, in the interest of time, the Contractor need not repeat the same details more than once, rather indicate which programs and task contains the appropriate discussion of response to the task. Contractors shall provide a separate proposal for each bundle in the RFP. Contractors are required to provide their strategy for Consumers Energy to achieve task objectives for the design, implementation, and marketing of each program.

3.1 Consumers Energy Roles and Responsibilities

Consumers Energy anticipates providing high-level administrative, contract management, program design, delivery, and marketing oversight of the selected Contractor. Consumers Energy will have a limited group of energy efficiency program managers to oversee Contractor operations. As such, Contractors must be prepared to implement these programs in a predominately “turnkey” fashion.

In summary, the anticipated roles and responsibilities for Consumers Energy utility staff that shall include but not be limited to the following:

1. Contract program oversight, management, financial planning, budgeting.
2. Provide high-level guidance and direction to the Contractor on a daily basis as a team player when working through strategy and implementation.
3. Review and approve Contractor invoices and ensure program activities are within budget and on schedule.
4. Provide and maintain a centralized energy savings and costs tracking system.
5. Review of Contractor maintained program tracking database for accuracy.
6. Review of Contractor maintained measure savings estimates.
7. Management and coordination of the Evaluation, Measurement, and Verification (EM&V) consultant with the Contractor.
8. Provide guidance and direction on Contractor proactive proposed new initiatives or strategies.
9. Communicate to Contractor other Consumers Energy initiatives that may provide opportunity for cross-program promotion (including demand response and renewable energy).
10. Conduct field customer satisfaction surveys to evaluate customer awareness and participation in the EWR programs over time.
11. Review and approve marketing plans and collateral.

3.2 Contractor Roles and Responsibilities

The following is a high-level review of Consumers Energy expectations for the Contractor's roles and responsibilities that shall include, but not be limited to the following. Note, this is a summary and the following requirements may be repeated in other sections of this RFP.

1. Locate at least 80% of personnel delivering Consumers Energy programs in Jackson, MI which will include portfolio manager, program manager(s) and other personnel.
2. Provide detailed staffing chart by position and firm. Include proposed location for staff, with proposal response.
3. Consider sub-contracts with local Michigan based firms.
4. Implement and deliver programs to achieve 100% of the savings as described in Section 2.4.
5. Conduct ongoing analysis to optimize savings objectives.
6. Contract financial planning and budgeting.
7. Propose and develop annual operations manuals, delivery plans, timelines, and milestones, beginning in November for the upcoming program year.
8. Cross-program promotion of all Business portfolio programs including demand response and renewables, when applicable.
9. Maintain and manage operational database which ties into Consumers Energy's tracking database.
10. Incentive processing and payment services, where applicable as addressed in Sections 3.7.
11. Develop marketing, provide outreach, follow QAQC requirements, coordinate EM&V consultant.
12. Trade ally and other market actor recruitment, enrollment, training, reporting, and maintaining relationships.
13. Monitor customer satisfaction and maintain level provided in Section 4.2, and implement a system for tracking complaints and satisfactory resolutions.
14. Assist Consumers Energy with MPSC requests, including participation with stakeholder meetings, technical subcommittee and development of new measures for the MEMD.
15. Identification and monitoring of program metrics through the use of visual management, including, at minimum, monthly operating reviews (MORs).

3.3 Start-Up Strategy and Transition Plan

Note: Limited information may be accepted from the incumbent contractor in this section but transition plans for new requirements, enhancements and program changes are required.

1. Define the key steps in your process to ensure a smooth transition or continuation of each program. This shall be done in coordination with Consumers Energy with respect to program management and marketing, incentive processing, scheduling appointments, call center, etc. It is expected that there will be no break in services from a participant's perspective.
2. Accurate data and reporting are required. Provide a comprehensive summary of your data tracking system and how it would integrate with Consumers Energy eTracker platform.
3. Where applicable, provide a plan outlining your strategy for engaging trade allies, Community Action Agencies, non-profits, and other market actors. Provide your approach to managing these established relationships.
4. Discuss your approach to staffing the program in the first three to six months, including the level of involvement from which corporate leaders. Detail how you will work to recruit and train Michigan based staff.
5. Describe your existing IT systems, such as scheduling or online application tools that are necessary for program delivery on January 1st, 2020. If these systems are not currently available, provide a detailed timeline for system readiness.

3.4 Program Design – All Programs

Your proposal should address for each program within the bundles included in this RFP the following areas:

1. Discuss your approach and strategy for final program design and implementation to ensure continuity in program offerings throughout the 2020-2022 Contract.
2. Introduce any new and innovative program ideas as well as your proven best practice approaches from around the country that you propose for Consumers Energy.
3. Provide the detailed measures you propose to promote, anticipated quantities, efficiency levels, savings and incentives in the workbook, Appendix G. Current measures are listed in Appendix G, Tab 2 and it is encouraged to design the program beyond the measures provided. If a new measure is included in the MEMD, please use those estimates for the required data. If not within the MEMD, please provide your calculations and sources for assumed savings values.
4. Describe your program design strategies to minimize free-ridership and if possible maximize quantifiable program spillover.
5. Describe your approach to working with Consumers Energy's EWR program managers and other subcontractors.

- a. Describe the ideal framework for communications, guidance, and decision-making. Outline the systems and teams you propose (e.g. design, delivery, marketing, technical review, QAQC, etc.) to ensure coordination and efficient and effective decision making with Consumers Energy program managers.
 - b. Detail how you propose to allocate staff resources and how you will develop expertise and ownership among staff for achieving the program goals.
 - c. If awarded, describe your transition plan with the incumbent implementation contractor.
5. Describe your approach to annually revising the implementation plan, reporting on key program metrics and operational milestones, establishing new performance metrics, and milestones as needed, and overall ability to track progress and manage budgets.
6. Contractors must clearly specify any anticipated subcontractors who will be utilized, their roles, responsibilities, and ensuring excellent customer satisfaction etc. Refer to the specific bundle and program worksheets in Appendix H. Describe your subcontractor management, and oversight plan.
7. Where applicable, provide your approach to recruiting and training new trade allies, Community Action Agencies, non-profits and other market actors to assist with program delivery. Indicate how you will specifically recruit veteran-owned, women-owned or minority-owned businesses as part of this effort.
8. Describe your approach to managing established relationships with trade allies and other market actors (where applicable). Summarize the profiles of the most critical trade allies/partners by program who you consider the most important partners for program success. Summarize how you ensure high levels of customer satisfaction with participating trade allies/partners, including your protocols for addressing customer complaints related to trade ally/partner performance.
9. (Bundles 1, 2, 3, and 5) Describe your proposal for developing and maintaining a trade ally website portal. The portal should include but not be limited to; application submittal, status of project including automated status communications (for customer and trade-ally), historical data of submissions, incentive payments, etc.
10. Where applicable, webchat is a valuable communication channel with both customers and contractors. Provide your experience, capabilities, and estimated timeline to launch a webchat service for customers, along with trade allies.
11. Webchat is a valuable communication channel with both customers and contractors. Provide your experience, capabilities, and estimated timeline to launch a webchat service for customers, along with trade allies.
12. Where applicable, provide an example of your online search tool to identify and contact trade allies, searchable by location as well as services provided.

13. Provide examples of how you could adjust program goals and tactics to accommodate changes to savings targets, both for “ramping up” and “scaling down.” Consider in your response a full range of activities, measures, incentive adjustments, marketing tactics, personnel assistance, etc.

3.5 Program Delivery

Your proposal should address, but is not limited to, the following:

3.5.1 Implementation Plan

1. Present your program delivery plan for 2020-2022. This shall include a Gantt chart with initial contract signing, program launch, and on-going delivery. Indicate the most important milestones and operational goals by program.
2. Define your approach and philosophy toward early identification of problems and implementation of adaptive program design if required. Detail your approach to handling conflict resolution on your team and with Consumers Energy.

3.5.2 Call Center (Bundles 1 - 6)

1. Describe the overall personnel structure within the call center(s), including geographic location(s). This shall include an estimated number of call center representatives, by program, and level of customer service representative experience. Provide the experience level of call center supervisors, and management along with the levels of representative experience based on a tiered structure from lowest qualified to most advance in energy waste reduction. Please use Appendix H to detail the costs per representative by level of experience for applicable bundles by program.
2. Describe your call center capabilities. This shall include number and location of facilities and number of calls capable of handling; both inbound and outbound.
3. Describe your strategy for handling backup or overflow calls, including locations.
4. It is expected that all locations will have the same quality system, scripts, standardized management procedures, and adhere to the same change management program. Please describe this system, and plan for adherence. This shall include call center representative performance and improvement.
5. Please describe the capabilities of your phone management system. At a minimum, it shall track average speed to answer (ASA), service level, first time call resolution (vendor shall include methodology of first time call resolution), average talk time, average handle time, calls abandoned, and calls sent to voicemail. The vendor shall also collect reason for call, disposition, and have a recording of all calls. This data shall be reported to Consumers Energy on a monthly basis.
6. It is expected that the vendor will measure the Forrester CXi (Customer Experience) for program calls handled. This shall be reported to Consumers Energy monthly.

7. A customer escalation system shall be included at the agent level, and provide a mechanism for program team notification. Consumers Energy has the right to listen to call recordings (on a regular basis).

3.5.3 Quality Control and Verification

1. Consumers Energy expects the vendor to provide one (1) FTE dedicated to QA/QC per primary contractor.
2. Contractors shall provide in their proposals, a detailed explanation of the quality assurance procedures that will be put in place for its programs, including, without limitation thereto, quality controls, tracking and forecasting, leading indicators, monitoring, measurement to goals set, regulatory compliance measures and audit procedures. Quality assurance procedures will address executing the program with minimal mistakes and customer service problems; protection of Consumers Energy customer data and the data files for the program to eliminate to the greatest extent possible tampering and misapplication or misappropriation of such data, and ensuring that work claimed and charged for has been performed as described.
3. Describe your internal and external fraud prevention approach, and philosophy to prevent, detect, and resolve any misconduct.
4. Describe your approach and implementation of quality controls in identifying process gaps and trends.
5. Implementation contractor must have the capacity to conduct field verifications/inspections on a quarterly basis per program to validate equipment, material installed, or service provided matches what was applied for. Please describe how you plan to achieve a high level of quality assurance within the programs. Describe your approach to ensure accuracy, integrity and quality throughout the program. Current number of field verifications conducted per program range from 5 to 10 percent depending on complexity and financial risk. This is a requirement for bundles #1, 2, 3, and 5.

3.5.4 Marketing

Discuss your approach and capabilities to develop a marketing and communications plan to support program delivery including customer participation. This task will involve coordination with Consumers Energy program staff to develop final program marketing and communications plan to ensure the Consumers Energy brand is maintained and enhanced. You are required to work with and coordinate on projects with Consumers Energy and the agency of record for the company. All materials will need to be approved by Consumers Energy via a centralized approval system that we provide access.

Address, although you are not limited to, the following areas in your proposal:

1. Given your understanding of Consumers Energy's market, outline your initial proposed marketing strategy, by program, including key milestones, use of existing resources, and timeline. Include the specific marketing approach or approaches you propose and how it will be tailored to the key target audiences for each. Include marketing approaches you propose to raise awareness and demand for each of the programs. If your bundle includes a trade ally

component, please detail marketing approaches you propose to enroll relevant trade allies and generate program participation.

2. List what you consider to be the most important marketing metrics to track and monitor, and those activities that can be taken to either increase or slow the pace of energy savings acquisition. Also describe the methods of tracking these metrics and include the cost of acquisition per proposed tactic.
3. While marketing staff and promotional costs are to be included in Appendix H, Consumers Energy is interested in gathering greater insight to costs that lead to bringing a marketing piece to market. Therefore, please identify any itemized annual costs associated with developing marketing strategy, maintaining a marketing database, segmentation analysis, data analytics, creative testing, reporting and metrics that Consumers Energy will need to bear.
4. Describe where the marketing staff assigned to the programs will be based and, as needed, their availability to meet directly with Consumers Energy's program managers and marketing managers.
5. Provide an example of your creative process including participants, an overall workflow, and timeframe from initial request to finished concept.
 - a. Discuss when and how clients are involved in the creative process
 - b. Discuss inspiration, ideation and efforts to gain greater understanding by the team
 - c. Discuss how creative ideas are brought to the client – formats, timing, approval process
6. Describe your internal quality processes and procedures.
7. Describe how you plan to ensure that proposed advertising campaigns and executions are pre-tested to quantitatively demonstrate (before going into market) that they are likely to effectively get consumer attention/breakthrough at desired levels, that they connect to the Consumers Energy brand, and that they motivate customers to take action. Describe your methodology for testing the effectiveness of marketing materials. Include by channel how they are going to accomplish this. In addition, how would you perform ongoing testing?
8. Describe how you will track effectiveness of in-market campaigns on similar metrics as well as customer response.
9. Consumers Energy provides outreach and awareness activities including, but not limited to: lunch and learns, expos, college events, presentations and other company requested events to promote the education of awareness of all programs. At a minimum, Consumers Energy expects one full-time employee to provide this outreach and manage it. Outreach requests will primarily be external to Consumers Energy, though internal (employee) outreach may also be required. Describe your approach to staffing these outreach events and management of these requests.
10. Describe your approach to cross promoting other programs within the business portfolio including demand response and renewables, when applicable. Also, describe your experience with teaming with other implementers in support of these activities.

11. Describe your creative design, graphic arts, and messaging skills. Include examples of previous creative marketing and technical support pieces as an appendix to your proposal. Indicate the Advertising Agency that was utilized to develop marketing materials.
12. Describe your experience and ability to develop and maintain general customer technical content for posting on the Consumers Energy website related to the programs requested in this RFP. Provide representative links to any existing websites which were developed by your firm for similar programs, and are in use today.

3.5.5 Evaluation, Measurement, and Verification

Consumers Energy conducts extensive Evaluation, Measurement and Verification research to assess and improve program and portfolio effectiveness. Please describe your capabilities in the areas below in providing data required for EM&V, and working with EM&V functions and contractors.

If you are a current Consumers Energy implementer, please address how you plan to maintain or improve your performance in these areas. If you are a prospective implementer, please briefly describe how your firm has partnered well with EM&V functions and evaluators at other clients in the areas below, and how you will ensure strong performance with us.

1. Please describe your capabilities in providing frequent data extracts to our EM&V contractors of recent program participants as sample for customer satisfaction research. For prospective implementers, please discuss how you have or would be able to provide this data as frequently as monthly, including ad-hoc reporting. Please also describe your capabilities in providing data extracts for other evaluation studies that would include program participation, and incentive payment data.
2. Please describe your capabilities in providing timely, and accurate annual data extracts of your program data as required for annual evaluator certification. Please indicate what your typical timelines are for generating this extract, and how you propose (or have) generated such an extract when required by January 31 of each year.
3. Describe your process to ensure data quality in general. Detail your proposed protocol for QA/QC. Describe your Quality Assurance procedures, and commitment to monitoring day-to-day operations.
4. Describe how you ensure that details submitted in the incentive applications are valid applications as these will be subject to EM&V audits to ensure accuracy.
5. Describe your capabilities and record of creating positive relationships and work interactions with utility EM&V departments, and evaluation contractors in general.
6. Please describe your ability to ensure that deemed measure savings from technical resource manuals are correctly being applied in all data tracking systems. Please also describe your firm's capabilities and experience in creating technical work papers that document proposed savings for new measures to be considered by program managers, evaluators and state regulators. If you have submitted a technical workpaper describing a new measure and

documenting evidence for its energy savings, please include an example in your proposal in the appendix, and note it in your EM&V section.

3.6 Incentive Processing

The Contractor should describe and must demonstrate the experience, skills and systems to accurately and quickly process incentive applications, track program activity, and coordinate data transfer with Consumers Energy's eTracker database.

1. Explain your previous experience and ability to process incentive applications, track participant and program savings data.
2. Describe your experience with and plan to verify valid applications, process incentive applications, track participant and program savings data, and issue reports. Detail how you propose to accomplish these tasks for Consumers Energy, and submit your proposed process map for incentive processing and data tracking.
3. Confirm your capability, and describe your experience with providing a web-based dashboard, password protected program tracking and real-time reporting capabilities for implementation staff, and Consumers Energy program managers to monitor. The real time dashboard should report key performance metrics including, but not limited to: application pipeline, cycle time, field inspections, savings, and spending. Include illustrative screen shots of reporting dashboards as an appendix.
4. Consumers Energy expects to offer participants application submission through online platforms. Describe your capability, experience, and suggestions with respect to the use of online incentive applications utilized by both customers and trade allies. Describe any experience with smart apps or other technologies for customer data collection and/or application submission and provide samples if possible.
5. Outline your approach to minimizing the "cycle time" of a customer's incentive application, starting with the date of service by the contractor, and ending with the date of incentive payment.
6. Where applicable, describe your experience with and your process releasing incentives to a third party. Include details on how you ensure customers are aware of the Consumers Energy incentive, and are receiving the full incentive value in this scenario.
7. Describe your incentive application record-keeping process, and ability to scan all hard-copy applications and using a paperless process so content and data is available in real-time for in-house and Consumers Energy project manager review.
8. Specify how costs for addressing customer service phone calls and incentive processing/incentive check processing will be priced, and if based on a per unit or per event basis, specify cost. For example: a) Fees per individual customer service phone call; b) Cost per incentive check issued. Clearly identify any costs that will be passed through to Consumers Energy for incentive processing and payment on a per application basis in Appendix H.

9. Describe your ability to fund and issue incentive checks to customers on behalf of Consumers Energy prior to payment from the utility.
10. Provide other forms of customer incentive payments your company has used, aside from paper checks. Include historical customer preference and best practices data for each method.

3.7 Systems and Data Tracking

3.7.1 Data Tracking

The Contractor should maintain an Operational Tracking System that tracks all aspects of the program. The system should be an existing system, and capable of providing essential information to Consumers Energy in real time with sufficient security controls to prevent data loss, leakage, or unauthorized access (internal and external) of Consumers Energy's customer, and program participation information.

eTracker is Consumers Energy's Energy Efficiency tracking and reporting system. eTracker utilizes a XML-based Simple Object Access Protocol (SOAP) for accessing web services over HTTP.

3.7.2 Encryption

The Contractor is required to utilize a site to site VPN. This protocol creates a secure, encrypted tunnel between two VPN devices. Site to site VPN connections are authorized for use between trusted third-party entities and Consumers Energy. These connections allow for traffic within a tunnel to be encapsulated (wrapped) providing an additional layer of security in the information system's design.

Web traffic will be transmitted over Secure Sockets Layer (link is external) (SSL), using only strong security protocols. Contractor will utilize Transport Layer Security (link is external) (TLS 1.2 or higher is required). Only selected cipher suite configurations can be utilized.

3.7.3 Informational Requirements

The Contractor will be provided with a Consumers Energy "masterfile" on a monthly basis that contains "active" (eligible) customers for the Contractors program(s). This "masterfile" will be downloaded from Consumers Energy's sftp site. Contractor will only receive customers (Class – C&I versus Business and Type – Natural Gas versus Electric) that are relevant to the program. The customer information supplied will be used for marketing and application validation and processing.

The files will be encrypted using Consumers Energy standards.

3.7.4 Information Processing Controls

The Contractor will identify whether information processing will be within their IT environment or hosted by a third party data center.

If information processing is within their IT environment, Contractor is required to supply a current SSAE 18 SOC 2 Type 2 or ISO27001 certification to be considered for the program. If Contractor is

using a third-party data center (or cloud based environment) an SSAE 18 SOC 2 Type 2 or ISO27001 certification is required for both the Contractor as well as the third party data center.

The Contractor will need to assist CE to deliver a Network Architecture diagram and data flow demonstrating how CE connects to the vendor (server information, data elements, etc.) .

3.7.5 Password Requirements

Solution must integrate with Okta based authentication for Consumers Energy employee logins.

3.7.6 Mobile Devices Security

If the Contractor utilizes mobile devices in the execution of the program, the following Consumers Energy standard is required:

A mobile device is defined as any portable, hand-held, hand-carried and/or wearable device that can transmit, store, or process company related information and can connect to the internet from an external location. Mobile devices include, but are not limited to, mobile phones, tablets, and personal digital assistants (PDAs).

All mobile devices must be configured with a secure container: a third party mobile application which is used to separate and secure a portion of the device's storage from the rest of the device. The goal of containerization is to isolate an application to prevent malware, intruders, system resources, or other applications from interacting with the application and its sensitive information.

The Contractor must provide mobile device application solution design, security standards, authentication/access control protocols and encryption protocols.

3.7.7 Access to Reporting/Business Objects

Business Objects is Consumers Energy's business intelligence enterprise software. eTracker will export all data nightly (6:00PM) where the Energy Efficiency Universe is refreshed. Contractor will have access to a folder where pre-formatted reporting can be accessed using a unique log-in and password.

Example:

Jobs with Check Information

Web Intelligence

0



These reports will be written by Consumers Energy’s Business Technology Support staff and the Contractor will have the ability to “run” and have selected “prompts” available for reporting. The reports can be exported into Excel.

3.7.8 Data Transmission Requirements

The Contractor must demonstrate the ability to connect to eTracker.

Consumers Energy provides three web services that enable Contractors to transmit installation information to eTracker, where it will be posted to the system's database. They are:

1. Residential Programs ("Job") web service - Customer Data, Measure Data
2. Commercial and Industrial Programs ("Project") web service - Customer Data, Measure Data
3. Supporting Documents web service (Job/Project) - All Associated Documents

The Contractor is required to provide measure installation data that conforms to the measure definitions contained in the Michigan Energy Measure Database (MEMD) including, where applicable: measure codes, units installed, building type, residence vintage, and central system type.

The web services may be directly invoked by the Contractor, Unique log-in IDs and passwords are required. Technical requirements are provided in Appendix F.

3.7.9 Quarterly Reconciliation

The Contractor is required to reconcile their Operational System data against eTracker on a quarterly basis. This data will contain customer level data, measure level data, incentives and energy savings. All information related to the Contractor’s program is exclusively the property of Consumers Energy and cannot be utilized for any other purpose without permission. Flawed and rejected Job/Projects are tracked and performance metrics are monitored on a quarterly basis. The Contractor’s internal savings processing must conform to the savings formulas specified in the MEMD.

3.7.10 Savings Recalculations

The Contractor will be required to have processes and software in place to recalculate energy savings for the current Program Year. This recalculation will be done at a Measure level. These recalculations are due to (but not limited to):

- EM&V Installation Rate adjustments
- EM&V Net to Gross Saving Adjustment Factors (default is 0.9)
- Weather Sensitive Updates (Quarterly adjustment)

Savings adjustments must be made within the Contractor's Operational Tracking Database within 7 business days.

3.7.11 Invoicing Processing

The Contractor shall utilize the Job/Project functionality to create invoices that will validate incentives and energy savings posted to eTracker. These invoices will be reviewed and authorized by Program Managers and QA/QC for accuracy prior to payment submission.

Exception Processing Requirements

In the event of an exceptions to a business rule (for example an inactive customer applying for an incentive) the Contractor will utilize the PCN process (Production Change Notice) to correct any erroneous data that has been posted to eTracker. The same PCN process will be used for:

- New Measure creation
- Business Rule creation or changes

The Contractor will describe their system change process and resources available to accomplish system changes within their Operational Tracking System and the interface with eTracker.

Other Data Tracking Requirements

1. All energy savings values and incremental costs (both required) are to be found in the latest version of the Michigan Energy Measures Database – MEMD.
2. All per unit savings (kWh, kW, Mcf, and performance savings) are to be rounded to 4 digits. (From the Michigan Energy Measures Database – MEMD)
3. MCF savings will be converted by multiplying therms * 0.0974 (and then rounding to 4 digits).

3.8 General Administration & Management

Contractors should describe their proposed approach for general management, budgeting, financial management, and reporting. This section should also include the approach for overseeing the performance of subcontractors and field implementers of programs.

Address, although you are not limited to, the following areas in your proposal:

1. Overall experience and systems used for administration and management of energy efficiency and program implementation and marketing. Outline your approach to monitor overall portfolio success and adjust programs and initiatives as needed over time.
2. Describe how you will track and allocate program costs and savings for electric versus natural gas measures and program expenses. Detail how you propose to fairly and proportionately allocate cross-cutting program administrative, promotion and marketing costs that promote both electric and natural gas programs.

3. Contractor is required to prepare weekly, monthly, quarterly, ad-hoc and annual reports detailing program results to date, anticipated activities, accomplishments, issues, and opportunities. Include in your appendix examples of past reports for programs delivered elsewhere.
4. Review your capability to develop, implement, and maintain the necessary financial accounting systems. This shall include the capability to review, approve, and track budgets, invoices, payments to subcontractors, program implementers, and customers. Confirm that your financial accounting system is consistent with general accounting standards. Also confirm that you shall be able to provide information and documentation required for independent annual financial audits.

4 CONTRACTOR PERFORMANCE

To emphasize the importance of delivering energy savings and a world class customer experience, Consumers Energy will place 50% of the Contractor's labor charges in hold status pending achievement of items 4.1 and 4.2 below.

4.1 Energy Savings Goals

Contractors are expected to achieve the first year and lifetime savings values shown in each program bundle provided in Section 2.3. Contractors must prepare savings tables for applicable bundles in Appendix G. This details specific participation goals and annual net MWh, MW and MCF savings, by year, and program for 2020, 2021, 2022 and combined by bundle for 2020-2022.

Contractors must use the 2018 MEMD deemed savings included in the supporting reference Excel file. In instances where a Contractor believes a viable measure is not included in the provided in Appendix G, Deemed Values, include the measure, proposed savings and source of your savings estimate in the Savings Bundle tab(s).

4.2 Other Performance Indicators

Consumers Energy prioritizes continuous program design enhancement and improvement in external and internal outreach, design, and processes. Overall performance improvement, over the three year time period, can be quantified and tracked by establishing key performance indicators. All performance goals are subject to final negotiation between Consumers Energy and the finalist prior to contract signing, and a process will be negotiated which establishes a schedule for annually re-visiting and revising key performance indicators and financial awards or penalties.

The performance standards below represent our current operational performance and we expect the selected contractor to continue to deliver, at minimum, the existing level of performance. Include these levels of achievement in the pricing. Provide examples and describe your company's ability in meeting these expectations. Your examples should be proven and should draw off real-life experiences with Consumers Energy and/or other utilities. Other performance indicators may be required or proposed.

4.2.1 Cycle Time

1. **Incentive Cycle Time (non-flawed applications):** For Bundles 1 and 3: Process and issue incentives upon receipt of a completed application received in a ready to process status upon completion within the following timeframe:

- Bundle 1 historical cycle time average: 26 calendar days
- Bundle 3 historical cycle time average: 21 calendar days

By program, what is your average cycle time for processing these non-flawed applications and describe how you plan to achieve/exceed this metric? Please note that a shorter time period will be viewed as favorable.

Incentive Cycle Time (flawed applications): For Bundle 3:

Provide your experience with processing applications that are submitted with errors (flawed). What is the average percentage of applications received flawed (per program)? What tactics have you implemented to reduce this percentage? By program, what is your average cycle time for processing these flawed applications?

- Bundle 3 historical cycle time average: 23 calendar days

4.2.2 Customer Satisfaction

Achieve and maintain a high customer satisfaction program rating of 9.0 on a 10.0 scale (this is the current portfolio average and target, not per-program requirement) as determined by program evaluators or a third party. Describe past results (and your program scores) with other clients with similar programs where you were able to increase or maintain a high customer satisfaction rating.

4.2.3 Energy Savings Forecasting

Meet mutually agreed upon monthly or quarterly savings forecasts by contractor and Consumers Energy within +/- 10%. Describe how you would ensure the accuracy of these monthly forecasts.

4.2.4 Data Quality

Contractor will be responsible for a quarterly Data Quality Reconciliation to occur within 4 business days of the end of the quarter. The reconciliation will be measured at the stage of application processing equivalent to Processing Complete – Ready to Pay. At this stage of the application processing 99% of jobs/projects presented will pass Net Lifetime Savings for kWh and MCF within the ETracker system or a flawed application rate of 1% or less.

5 PERSONNEL AND EXPERIENCE

Contractors are requested to describe their firm and/or team's experience and capabilities in managing, delivering, and implementing the programs requested in this RFP. Contractors must provide detailed information on their overall core team qualifications and experience, including the following:

5.1 Management and Staffing

In this section, Contractors are requested to:

1. Identify the senior executive that will be designated to ensure that the account receives appropriate support from the contractor's entire organization and all organization's on the contractor's team. This executive is required to participate in quarterly quality reviews by phone and annual reviews by phone or onsite, as requested.
2. Include a management and organizational chart that depicts the relationships and proposed agreements among all team members (including subcontractors) to accomplish the tasks in this RFP.
3. Outline your longer term staffing strategy for the program, and what steps you will take if a leader in your Michigan based team leaves your firm. Additionally, discuss your commitment under the long-term implementation to have dedicated Michigan-based staff working exclusively on Consumers Energy programs.
4. In Appendix H, describe the number of field staff, by applicable Bundle and program, such as engineers, energy advisors and technicians you plan on deploying and overseeing. This shall include any subcontractors and identified as such. Detail how you will achieve and maintain a high level of contractor participation and satisfaction.

5.2 Qualifications, Experience and Understanding

1. Describe your previous experience as a lead contractor responsible for the programs requested in this RFP. Do you have experience serving as a "turnkey" program delivery contractor or a partial turnkey delivery contractor in coordination with utility staff? Summarize your previous experience with implementation strategy for each of the programs specified in this RFP.
2. Describe previous experience you have working directly in Michigan or the Midwest as it relates to the programs in this RFP.
3. What is your current understanding of the Michigan market for the programs specified in this RFP with regard to opportunities for energy waste reduction? What opportunities and challenges do you anticipate, and how will you address them?

5.3 Résumés and Bios

Contractors are requested to identify key personnel to be assigned to this project. Describe their primary responsibilities in a brief biography (one paragraph), and include a maximum two (2) page résumé that describes the individual's experience and qualifications. This should include information for the staff which will be doing the actual work at the Jackson, Michigan office and key senior staff from other corporate offices including start-up/transition staff if different than program staff.

Résumés and bios should describe relevant responsibilities from other projects that will help Consumers Energy evaluate the qualifications and experience of key personnel. Résumés and biographies submitted during the RFP process should be for staff committed to working on the programs, with specific reference to which staff will be involved in a temporary start-up and transition role, versus long-term staffing. Describe your willingness to allow Consumers Energy the ability to review key hires and request transfers of key staff during the course of the project.

The proposals must include agreements by individual subcontractors listed in bids to provide the outlined services. This agreement must be signed by a person with the authority to make such a commitment. There is no prohibition directly by Consumers Energy for firms to be included in more than one proposal.

5.4 Client References

Contractors are requested to provide five (5) references from current (preferred) or previous clients for whom they have performed projects that are relevant to the Scope of Work. References should include a brief synopsis of specific services provided, project size, results, company name and location, contact name, contact title, telephone number, and email address.

Contractors must complete and submit with their proposal the Contractor's Reference Form provided in Appendix D.

5.5 Disclosure

Contractors are requested to describe any potential conflict of interests. Specifically, Contractors are requested to disclose if an employee has ever worked for Consumers Energy in the past, detailing briefly the year and activities undertaken. Previous experience working for Consumers Energy is not a conflict of interest; however, it must be disclosed. Additionally, Contractors are requested to disclose if they are a manufacturer, or affiliate of any hardware or software which they propose to use in the course of performing this assignment. If Contractors have any questions, they are encouraged to seek clarification.

5.6 Financial Information Requirements

Contractors are requested to demonstrate and verify that they have the financial resources and stability to perform the proposed work.

1. Note any other related and pertinent financial information or disclosures that the Contractor considers important.

2. Specify any preferred or desired financial terms which will facilitate your firm's ability to respond to this RFP.
3. Contractors must demonstrate that they have the financial resources to perform the proposed work (e.g., last three years of audited financial statements for their firm and any significant subcontractors, which should include a profit and loss statement, a cash flow statement, and a balance sheet (*e.g.* SEC form 10-K is acceptable).
4. A non-public or non-profit entity shall provide adequate information comparable to the information required above, that allows an assessment of financial status and capability.
5. In the event a Contractor is forming a new organization to bid on this proposal, the Contractor should provide comparable documents from investors, partners, and/or principals.
6. Contractors must clearly identify the accounting method that they propose to utilize throughout the term of the contract.

The Contractor shall submit the following information regarding the Contractor's organization:

1. Legal name of Contractor
2. Form of organization: corporation; partnership; individual d/b/a; or other as applicable
3. State of incorporation or registration
4. Federal Identification Number or Social Security Number as applicable
5. Address of Contractor (place of business)
6. E-mail address and website URL
7. Minority and/or Women-Owned Business Enterprise (MWBE)
8. Michigan Based Business (MBB)
9. Business card information for primary Contractor contact
10. Ability to receive payments via a Financial Electronic Data Interchange (FEDI)
11. Non-profit or for profit status

If applicable, the Contractor shall submit the information requested above for each proposed subcontractor.

6 BUDGET

Contractors are requested to detail program delivery costs for each of the programs, by year, for 2020, 2021, and 2022, and 2020-2022 combined. Submit estimated costs according to the format as outlined in the supporting Appendix H included with this RFP. If an alternative design within a bundle is proposed, a separate budget must be provided, in addition to the individual program budgets as described above. Proposals not adhering to this requirement will not be accepted.

Note, Pilots have historically been funded at 5% of the overall portfolio.

7 **PROPOSAL RESPONSE FORMAT**

Proposals must provide a concise yet complete description of the Contractor's approach and capabilities for satisfying the required services outlined in this RFP.

Contractor's proposal must contain all the information requested in Appendix E, Proposal Response Format and Checklist, or the Contractor's proposal may, at Consumers Energy's sole and absolute discretion, be deemed unresponsive and will not receive further consideration. In the event that a Contractor chooses not to respond to a section of the RFP format or any other requested information, the Contractor should then, in place of the appropriate section or information, indicate its reason for the omission of a response. In addition, Contractors should address any and all anticipated difficulties and/or problem areas along with potential approaches to their resolution. Responses which identify staffing limitations or budget constraints, or other specific challenges in achieving desired program goals, along with recommendations to overcoming challenges, will be well received.

In addition, the Contractor is encouraged to pro-actively present additional information, not specifically requested, which helps demonstrate understanding of the market and ability to achieve program goals. This is especially relevant to the discussion of performance goals and delivery approach.

Contractors must prepare their proposal response according to the following format:

1. Cover letter
2. General Company Information
3. Contractor Understanding/Approach for Each of the Programs
 - a. Description of the program's scope and objective (including the market and customer segment served), and the key end uses that the program will cover.
 - b. Basis for the need of the program, and projected accomplishments of the program.
 - c. Program theory (e.g., program logic, niche, resources, and energy goals) and why you think customers or market actors will respond sufficiently to the proposed program design leading to enough installation of measures to meet the energy savings goals.
 - d. Your company's roles and responsibilities in the program. Also, include subcontractor roles and responsibilities.
4. Review of Roles and Responsibilities and Understanding of Assignment
 - a. In this section the Contractor shall describe the assignment as they see it, highlighting their key roles and responsibilities in the delivery of a successful program for each of the programs.

5. Scope of Work

- a. Contractor shall include in their proposal a detailed discussion of the Program Scope of Work in its entirety.
 - i. Task 1 Transition and Start-Up
 - ii. Task 2 Program Design (All programs and by individual bundle)
 - iii. Task 3 Program Delivery (Implementation, Call Center, QAQC, Marketing, EM&V)
 - iv. Task 4 Incentive (Incentive) Processing
 - v. Task 5 Data Tracking and Systems
 - vi. Task 6 General Administration/Management

6. Contractor Performance

- a. Contractor shall provide an estimate of energy savings achievable by year and overall for the three year period, for each of the programs as described in Section 2.3, Bundle Descriptions.
- b. Contractor shall also detail other proposed performance goals and milestones by program.

7. Personnel Experience

- a. Contractor shall describe their team's qualifications and experience in implementing the requested programs as described in Section 5, Personnel Experience. In addition to the detailed response, Contractor shall include the following information:
 - i. Management and organizational chart
 - ii. Resume (two page max) and brief (one paragraph) biography for key personnel
 - iii. Client references, including contact information (See Appendix D, Contractor References Form)
 - iv. Financial and Organization information

8. Budgets by program by Year

- a. Contractor shall provide detailed total labor and other direct costs, by year, by program when applicable, as well as any other information requested in Section 6, Budget. Contractors must include completed budget tables provided in Appendix G.

9. Appendices

Contractor may include any additional information in appendices that they feel relevant

- a. Appendices are to not exceed 50 pages. Contractor may include additional information in appendices that they feel relevant.

8 EVALUATION CRITERIA

Proposals that combine experience and commitment to proven program designs, with a willingness to expand and innovate, combined with also maximizing savings per dollar invested will be scored more highly. Consumers Energy desires cost competitive proposals that can convincingly present a strategy to meet savings targets. The proposals may be evaluated on, **but not limited to**, the scoring matrix below:

Table 16. RFP Evaluation Criteria/Scoring Matrix

Part A: Technical Approach	
1	Proposed Design and Delivery to achieve/exceed Energy Savings Targets
2	Timeline to Implement/Deliver Programs with Detailed Tactical Transition Plan
3	Acceptance of Performance Goals with ability to meet metrics provided
4	Demonstrated Capability to Integrate with Owner's eTracker System
5	Demonstrated Approaches to Enhance the Customer Experience through use of Innovative Technologies and Best Practices while maintaining likelihood for successfully meeting and exceeding savings goals.
Part B: Organizational and Management Capability	
1	Proven Program Specific Competence and Experience
2	Transitional Plan & Schedule
3	Program Specific Management Structure and Staffing Plan (Preference given to use of Michigan based personnel)
4	Locate program headquarter office in Jackson, MI
5	Economic Impact (Flow Back) into Michigan
6	MWBE Contractor or Subcontractors
Part C: Cost	
1	Labor, Incentive, Direct Costs; Flow back to Michigan
2	Level of Detail Provided in Supporting Budget Worksheet
3	Ability to Meet Savings Goals Cost Effectively

9 RFP RESPONSE PROCEDURES

9.1 Intent to Bid and Michigan Based Firms

Contractors are requested to indicate their “intent to bid” by registering on Consumers Energy’s PowerAdvocate Sourcing Intelligence platform by November 7, 2018.

9.2 RFP Schedule

November 30, 2018	Issue RFP
December 8, 2018	RFP question period ends
December 17, 2018	RFP question responses posted
December 19, 2018	Intent to Bid Notification
January 30, 2019	Proposals due
March 22 – April 5, 2019	Interview finalists
January 1, 2020	All programs operating under new contract

The above schedule is subject to change at the sole discretion of Consumers Energy. The individual designated as Contractor’s contact (in either the proposal or the intent to bid) must be available to receive and respond to inquiries and requests throughout the solicitation process.

9.3 Solicitation Webservice

Requests for proposals, responses to Contractor questions, and other solicitation documents will be on Consumers Energy’s PowerAdvocate Sourcing Intelligence platform. Schedule changes, revisions to the RFP, and other important information may be posted from time to time. **It is the Contractor’s responsibility to check for updates so that they can prepare complete and informed proposals.**

9.4 RFP - Questions and Communications

Contractor questions related to this RFP should be submitted on Consumers Energy’s PowerAdvocate Sourcing Intelligence platform. If you do not have an account on PowerAdvocate, a registration link will be sent with the email invitation. If you have any difficulty completing registration please email support@poweradvocate.com for assistance. Questions are to be submitted before the due date specified in Section 9.2. Questions submitted after this date will not be addressed. Copies of all questions and answers will be posted anonymously on the site.

No other contact with Consumers Energy employees related to this RFP shall be made throughout this entire process. Any unauthorized contact may result in immediate disqualification.

Consumers Energy reserves the right to contact a Contractor at any time for clarifications about any part of the Contractor's proposal. Proposal review questions and communications will focus on clarifying the information set forth by the Contractor in the proposals and will not be an opportunity for the Contractor to revise terms.

9.5 Submission of Proposal Responses

Contractors must submit both hard copy and uploaded electronic versions of their proposals by the due date and times listed below. Consumers Energy requests only pertinent information be provided and therefore have limited the proposal response. The maximum page length for the first bundle bid is 75 pages with an additional 25 page maximum for each subsequent bundle, where applicable. There is a 50 page limit for appendices regardless of the number of bundles bid. Any Proposals received after the date and time will be rejected. Proposals that do not contain the information requested in this RFP may also be rejected at Consumers Energy's sole and absolute discretion.

1. **Acceptance of Terms and Conditions** - The submission of a proposal to Consumers Energy shall constitute a bidder's acknowledgement and acceptance of all the terms, conditions and requirements set forth this RFP unless exceptions are noted specifically
2. **Time and Place for Submission:**

Due Date: See Schedule in Section 9.3

Time Due: 5:00 p.m. (Eastern Standard Time)

To: Matthew Schuette
Consumers Energy
Office: EP8-455
One Energy Plaza
Jackson, MI 49201
Phone Number: 517-788-1073

Proposals received after this deadline will be rejected.

3. **Proposal Submission** – For Consumers energy internal distributions, contractors are required to submit ten (10) hard copies (with one (1) copy being unbound and single-sided and nine (9) copies being bound and double-sided) of their Proposal and Appendices. Proposals must be enclosed in a sealed envelope or box clearly marked "Proposal". If more than one box is required, clearly identify the box as "1 of xx". In addition to the hard copies, Contractor shall include upload of the proposal response, including Appendices, to Consumers Energy's PowerAdvocate Sourcing Intelligence platform. Proposals are to be submitted in Microsoft Office software (Word, PowerPoint, and Excel) format.
4. **Verification of Receipt of Proposal** – It is the Contractor's sole responsibility to ensure that its Proposal is received at the address specified above by the deadline for submission.

5. **Errors or Omissions** – A Contractor that discovers an error or omission in its Proposal response package may withdraw that package and resubmit one, provided that it does so before the deadline for submission of Proposal responses.
6. **RFP Withdrawal** – Consumers Energy reserves the sole and absolute right to withdraw this RFP at any time before the duly authorized execution of the contract/purchase order with Contractors for any reason including, but not limited to, action by the MPSC that modifies or withdraws the program. In its sole and absolute discretion, Consumers Energy may accept or reject any or all proposals, and may accept other than the lowest cost proposal. Consumers Energy will not assume any liability, under any circumstances, to any Contractor submitting a proposal in response to this RFP.
7. **Proposal Preparation Costs** – Contractor accepts any and all costs and expenses incurred prior to the duly authorized execution of the contract/purchase order and will not seek any costs and expenses from Consumers Energy.
8. **Ownership of Proposals** - All proposals submitted by the Contractor to Consumers Energy in response to this RFP shall become the exclusive property of Consumers Energy and may be used for any reasonable purpose by Consumers Energy.
9. **Proposal Confidentiality** – To the extent possible, Consumers Energy will attempt to keep submitted proposals confidential. However, it is possible that proposals may be requested by the MPSC for review, or by other interveners, and as such, full assurance of complete confidentiality is not possible. Furthermore, Consumers Energy will not assume any liability to a Contractor or other party as a result of any public disclosure of any proposal or contract/purchase order.

9.6 Terms and Conditions of Submission

Review the Consumers Energy's Sample Contract Terms and Conditions, insurance requirements, Third Party Ethics and Compliance, and errors and omission documents located under the "Documents" section of the RFP website and make note of any exceptions in your proposal response. All proposals, along with all other documentation, submitted in connection with this RFP shall become and will remain the property of Consumers Energy and will not be returned to the Contractor.

By submitting a proposal pursuant to this RFP, Contractors acknowledge and agree that (a) they will be fully bound by the terms and conditions of this RFP and Consumers Energy Terms and Conditions in submitting their proposals, (b) they have had the opportunity to seek independent legal and financial advice of their own choosing with respect to the RFP and their proposals, (c) they have obtained all necessary authorizations, approvals and waivers, if any, required by them as a condition of submitting their proposals, (d) they are submitting their proposals subject to all applicable laws, and (e) they have not engaged and will not engage in communications with any other Contractor in the RFP concerning the price or other economic terms contained in their proposals and have not engaged in collusion or other unlawful or unfair business practices in connection with this RFP.

9.7 Consumers Energy is under no obligation to execute a contract

Nothing contained in the RFP shall be construed to require or obligate Consumers Energy to select any proposals or limit the ability of Consumers Energy to reject all proposals in its sole and exclusive discretion. Consumers Energy further reserves the right to withdraw and terminate this RFP at any time prior to the execution of a contract.

Information provided in proposals submitted shall be translated to scope of work requirements where applicable in contracts for selected bidders.

9.8 Non-Confidentiality of Submissions

Contractors acknowledge and agree that the submission of a proposal or other information to Consumers Energy does not establish any fiduciary or confidential relationship between the Contractor(s) and Consumers Energy, nor is there one intended or created by reason of this RFP and/or submission of a proposal. The Contractor(s) agree that Consumers Energy shall not be obligated to return the proposal to the Contractor(s), and the Contractor(s) release Consumers Energy from any and all liability if the proposal is lost, misplaced, stolen or destroyed.

Contractors should not submit any information containing its or any third party's trade secrets or other proprietary or confidential information. Contractors are hereby advised that Consumers Energy may use non-utility industry consultants to assist them in evaluating proposals, and for such work, Consumers Energy will allow these selected consultants to review all proposals that it will be evaluating, including pricing and other Contractor-provided materials within the proposal. These consultants will be required to sign a non-disclosure agreement with Consumers Energy.

Contractors are also hereby advised that Consumers Energy may also disclose proposals, or any information contained therein, by legal process or to judicial, governmental or regulatory authorities. Consumers Energy may elect to enter into mutual nondisclosure agreements with Contractors selected for further participation in transactions which are the subject matter of this RFP, but is not agreeing to such an arrangement at this time and will infer that information which is submitted by each Contractor is not deemed confidential or proprietary information of the Contractor or any third party.

9.9 Post Proposal Negotiation and Awarding of Contracts

Consumers Energy reserves the right to negotiate both price and non-price factors during any post-proposal negotiations with a finalist. Consumers Energy has no obligation to enter into an agreement with any respondent to this RFP and may terminate or modify this RFP at any time without liability or obligation to any respondent. This RFP shall not be construed as preventing Consumers Energy from entering into any agreement that it deems appropriate at any time before, during or after this RFP process is complete.

Consumers Energy will utilize its CONTRACT FOR ENERGY EFFICIENCY TECHNICAL AND CONSULTING SERVICES for this contract. A copy of this document is attached in Appendix A. Exceptions must be indicated using the 'Track Changes' option.

9.10 Minimum Qualifications

The Contractor team responding to this RFP must have at least the following qualifications to be considered for selection:

1. At least five years of experience with delivery and marketing similar types of energy efficiency programs for utility sponsored or other system benefit charge funded programs.
2. Demonstrated organizational, financial, and data tracking and reporting abilities.
3. Demonstrated commitment to quality and customer service.
4. Contractors are required to locate at least 80% of team supporting program work in Jackson, Michigan.

9.11 Negotiations and Finalizations

Once the Contractors have been selected for the program, contract negotiations will be conducted. These negotiations will relate to the scope of work, specific program design features, program budgets, schedules, and payment terms with reference to proposal response to this RFP. The contractual terms will include general terms and conditions. Consumers Energy reserves the right to simultaneously conduct negotiations with both the prospective Contractor and an alternate Contractor. Consumers Energy also reserves the right to terminate negotiations with any Contractor in the event that Consumers Energy and the Contractor are unable to agree on contract terms and conditions within a reasonable period of time to be determined in Consumers Energy's sole and absolute discretion.

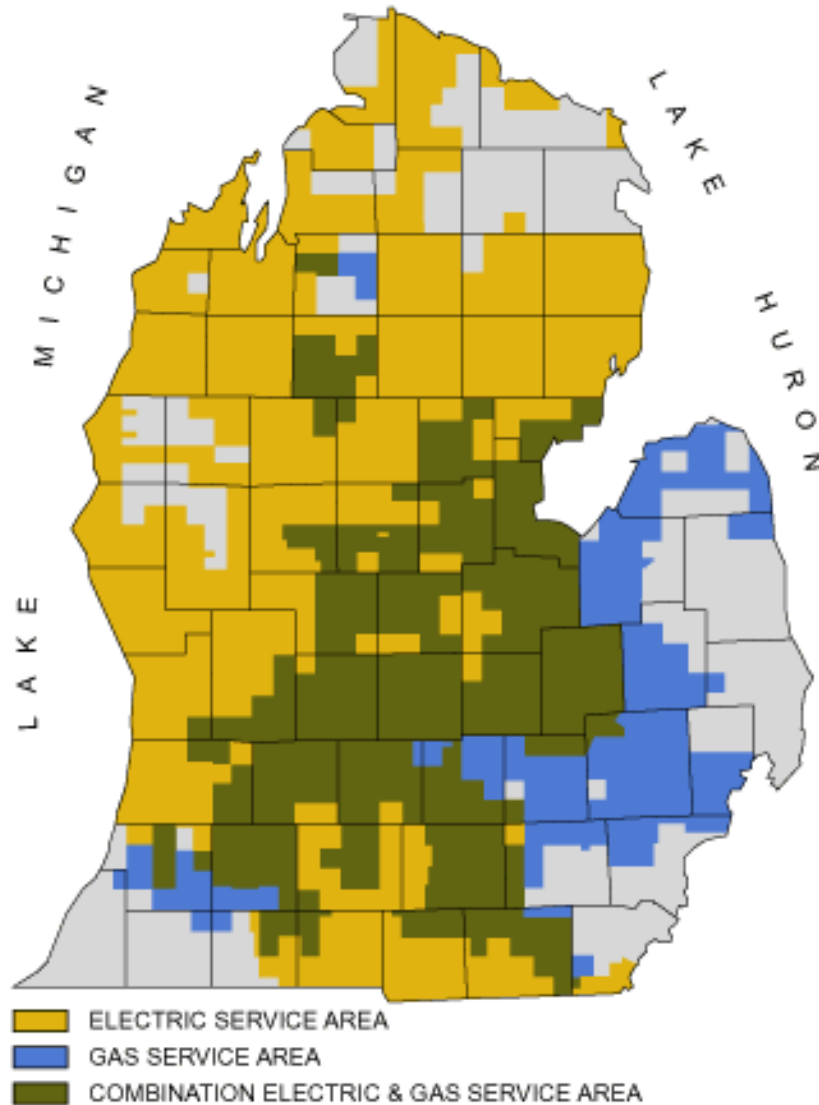
APPENDIX A. CONTRACT FORMS

The work/services described, shall be furnished in accordance with the terms and conditions set forth in the following documents:

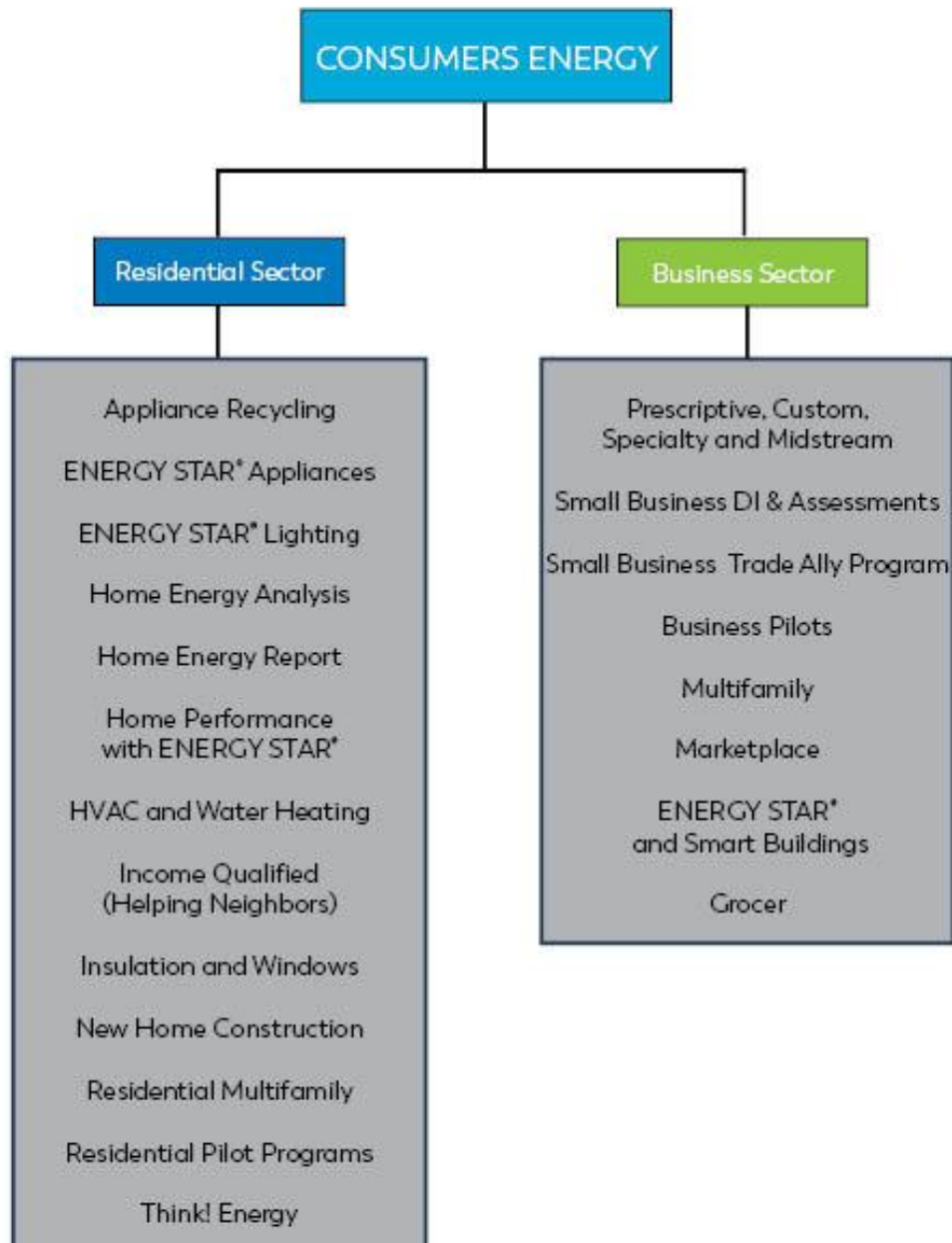
- CONTRACT FOR ENERGY EFFICIENCY TECHNICAL AND CONSULTING SERVICES
 - Contract Insurance Supplement – Class A with Cyber (CSS Form 928) (located within CONTRACT)
- CMS Energy Corporation 2017 Third-Party Code of Conduct
- Vendor Profile
- Provide – two years of audited financials

See separate documents for Appendix A.

APPENDIX B. CONSUMERS ENERGY SERVICE TERRITORY (MICHIGAN)



APPENDIX C. CONSUMERS ENERGY EWR PORTFOLIO STRUCTURE FOR 2020-2022



APPENDIX D. CONTRACTOR'S REFERENCE FORM

Contractor must provide at least five (5) references, providing the following information as outlined in example Table presented below.

Table 17. Contractor's Reference Form

Contractor Name:	
Program(s):	
Reference #1	
Reference Organization Name:	
Reference Contact Person:	Reference Title:
Reference Organization Location:	Phone/e-mail:
Project Description, Budget, Time period, and Summary Results	
Team Members on Project:	
<p>Consumers Energy requests the Contractor include public utility commission case numbers from this referenced utility project and a link to the docket number and public reports that summarize the performance of programs implemented by the Contractor. In addition to providing web links, Contractors are requested to include the most recent summary documents presenting official portfolio results, costs, and savings as part of the proposal response.</p>	

APPENDIX E. PROPOSAL RESPONSE FORMAT AND CHECKLIST

Contractors are required to prepare their proposal response according to the format in Table 18. This table must be included in Contractor's proposal as the table of contents for proposal. **Proposals must be 12 point font and Succinct and summarized responses addressing requested areas of interest are desired. The maximum page length for the first bundle bid is 75 pages with an additional 25 page maximum for each subsequent bundle, where applicable. There is a 50 page limit for all appendices regardless of the number of bundles bid.**

Table 18. Proposal Checklist

	Included? (Y/N)	Section/Page Number
Format and Proposal Requirements are met		NA
Cover Letter		
General Company Information		
Short Program Summary		
Review of Roles and Responsibilities and Understanding of Assignment		
Scope of Work (All tasks)		
Performance Goals:		
<ul style="list-style-type: none"> Contractor Savings Goals by Program Year 		
Qualifications and Experience		
<ul style="list-style-type: none"> Management and Organizational Chart 		
<ul style="list-style-type: none"> Brief (one paragraph) biography for key personnel 		
<ul style="list-style-type: none"> Appendix D: Contractor's Reference Form 		
Appendices		

• Contract Forms (Contract with Insurance Supplement, Vendor Form)		
• Terms and Conditions Acceptance or Exceptions Form		
• Vendor Profile		
• Program Budget Table(s)		
• Program Savings Tables		
• Two page resumes for key personnel		
• Previous two years of audited financial statements		
• Other supporting material as deemed relevant		

APPENDIX F: POSTING INSTALLATION DATA TO ETRACKER

A. Business Requirements

Contractors are required to transmit data to eTracker for each application it processes. This information includes (but is not limited to):

1. Customer information (e.g., account number)
2. Facility/Residence information
3. Job Status
4. Installation Contractor information
5. Installed Measure information, including quantity installed and associated incentive
6. Field Inspection data
7. Payment Information
8. Supporting Documentation

This information must be transmitted to eTracker on a regularly scheduled basis, and must contain data for all applications whose status has changed since the last transmission. Installations with longer life cycled may require multiple data transmissions over the life of the effort. Installations with a very short life cycle (e.g., retail lighting and appliances) may only require one transmission (i.e., when the application has been completed), but could potentially require more if the job moves through multiple statuses.

B. eTracker Data Transmission Process

Consumers Energy provides three web services that enable Contractors to transmit installation information to eTracker, where it will be posted to the system's database. They are:

1. Residential Programs ("Job") web service
2. Commercial and Industrial Programs ("Project") web service
3. Supporting Documents web service

The web services are directly invoked by the Contractors. Contractors should be capable of extracting installation data into pre-defined XML records and then invoking the appropriate web service. Customers should be prepared to receive and respond to error codes/messages contained in XML response records returned from the web service.

C. Web Service Artifacts

1. Commercial and Industrial ("Project") Web Service
 - a. WSDL

<https://www.consumertracking.com/ConsumerEE/webservices/project.wsdl>

b. Request Record XSD

<https://www.consumertracking.com/ConsumerEE/webservices/xsd/Project.xsd>

c. Response Record XSD

Note: The same response record XSD is used for all web services (Project, Workpackage/Job, and Document)

<https://www.consumertracking.com/ConsumerEE/webservices/xsd/UploadResponse.xsd>

d. Request Record XML Layout

```
<soapenv:Envelope
xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:proj="http://www.consumertracking.com/shemas/project">
  <soapenv:Header/>
  <soapenv:Body>
    <!--Identify Extract and Implementation Contractor-->
    <proj:extract>
      <extractID>?</extractID>
      <impContractor>?</impContractor>
      <extractTime>?</extractTime>
      <!--Identify Project-->
      <Project>
        <projectId>?</projectId>
        <program>?</program>
        <progYear>?</progYear>
        <progSubtype>?</progSubtype>
        <progInitiative>?</progInitiative>
        <createDate>?</createDate>
        <projectDescription>?</projectDescription>
        <projectManager>?</projectManager>
        <projectCost>?</projectCost>
        <!--Identify Installation Location-->
        <facility buildingType="?">
          <numberOfUnits>?</numberOfUnits>
          <facilityCity>?</facilityCity>
          <facilityStreetAddr>?</facilityStreetAddr>
          <facilityName>?</facilityName>
          <facilityZip>?</facilityZip>
          <facilityPhone>?</facilityPhone>
          <facilityEmail>?</facilityEmail>
          <facilitySqFoot>?</facilitySqFoot>
        </facility>
      </Project>
    </proj:extract>
  </soapenv:Body>
</soapenv:Envelope>
```

```

    <contactLastName>?</contactLastName>
    <contactPhone>?</contactPhone>
    <contactEmail>?</contactEmail>
</contact>
    <!--Identify Installation Contractor-->
<installContractor>
    <ICContractorCode>?</ICContractorCode>
    <contractorLicense>?</contractorLicense>
    <contractorTaxID>?</contractorTaxID>
    <contractorPhone>?</contractorPhone>
    <contractorMatchKey>?</contractorMatchKey>
    <contractorRole>?</contractorRole>
    <contractorCompanyName>?</contractorCompanyName>
    <contractorAddress>?</contractorAddress>
    <contractorCity>?</contractorCity>
    <contractorState>?</contractorState>
    <contractorZip>?</contractorZip>
    <isTradeAlly>?</isTradeAlly>
</installContractor>
<selfInstalled>?</selfInstalled>
<!--Report Project Status History-->
<projectStatuses>
    <projectStatus>
        <projStatus>?</projStatus>
        <projStatusDate>?</projStatusDate>
    </projectStatus>
</projectStatuses>
    <!--Identify dates when actions occurred-->
<lifecycleDates>
    <preApplicationDate>?</preApplicationDate>
    <finalApplicationDate>?</finalApplicationDate>
    <workScheduledForDate>?</workScheduledForDate>
    <installationStartDate>?</installationStartDate>
    <installationCompleteDate>?</installationCompleteDate>
    <cycleTimeExclusionReason>?</cycleTimeExclusionReason>
    <preInspectionDate>?</preInspectionDate>
    <preInspectionWaived>?</preInspectionWaived>
    <postInspectionDate>?</postInspectionDate>
    <postInspectionWaived>?</postInspectionWaived>
    <postInspectionPassed>?</postInspectionPassed>
    <postInspectionResolvedDate>?</postInspectionResolvedDate>
    <holdDate>?</holdDate>
    <holdReason>?</holdReason>
</lifecycleDates>
    <!--Identify Customer's Account(s)-->
<customer>
    <account1>?</account1>
    <account2>?</account2>

```

```

</customer>
<!--Information related to the C&I New Construction program-->
<newConstruction>
  <ncSubtype>?</ncSubtype>
  <ncAssocProject>?</ncAssocProject>
</newConstruction>
<!--Installation-related Tasks (e.g., Pre-inspection, Post-inspection)-->
<workFlow>
  <task taskID="?">
    <taskType>?</taskType>
    <taskStatus>?</taskStatus>
    <numberUnitsInspected>?</numberUnitsInspected>
    <taskStartDate>?</taskStartDate>
    <tstatusEndDate>?</tstatusEndDate>
  </task>
</workFlow>
<!--Proposals presented to customer for Direct Install project-->
<diVersions>
  <diProposal>
    <diProposalNumber>?</diProposalNumber>
    <diProposalStatus>?</diProposalStatus>
    <diProposalDate>?</diProposalDate>
    <diRejectReason>?</diRejectReason>
    <diProposalCost>?</diProposalCost>
    <diProposalIncentive>?</diProposalIncentive>
    <diProposalCopay>?</diProposalCopay>
    <diProposedMeasures>
      <diProposedMeasure diMeasureCode="?">
        <diMeasureQty>?</diMeasureQty>
        <diMeasurekWh>?</diMeasurekWh>
      </diProposedMeasure>
    </diProposedMeasures>
  </diProposal>
</diVersions>
<!--Installed Measures -->
<installedMeasures>
  <installedMeasure>
    <proratedIncentive>?</proratedIncentive>
    <measureCode>?</measureCode>
    <measureICUniqueID>?</measureICUniqueID>
    <installQuantity>?</installQuantity>
    <installDate>?</installDate>
    <customMeasureDesc>?</customMeasureDesc>
    <customMeasureLife>?</customMeasureLife>
    <kwhSavings>?</kwhSavings>
    <kwSavings>?</kwSavings>
    <mcfSavings>?</mcfSavings>
    <unitEfficiency>?</unitEfficiency>
  </installedMeasure>
</installedMeasures>

```

```

        <customIncentiveElectric>?</customIncentiveElectric>
        <customIncentiveGas>?</customIncentiveGas>
        <ncDesignElectric>?</ncDesignElectric>
        <ncDesignGas>?</ncDesignGas>
        <modelName>?</modelName>
        <serialNumber>?</serialNumber>
        <uncappedCustomIncentive>?</uncappedCustomIncentive>
        <incentiveCapped>?</incentiveCapped>
    </installedMeasure>
</installedMeasures>
<!--Measures Installed in each unit of a building (Multifamily only)-->
<tallySheets>
    <mfTallySheet>
        <mfcomplexName>?</mfcomplexName>
        <mfbuildingName>?</mfbuildingName>
        <mfUnitID>?</mfUnitID>
        <mfMeasureCode>?</mfMeasureCode>
        <mfInstalledQty>?</mfInstalledQty>
    </mfTallySheet>
</tallySheets>
<!--Incentive Payment Information)-->
<payment>
    <payAuthBy>?</payAuthBy>
    <payAuthDate>?</payAuthDate>
    <checkDate>?</checkDate>
    <checkNumber>?</checkNumber>
    <checkAmount>?</checkAmount>
    <payeeMailName>?</payeeMailName>
    <payeeMailAddress>?</payeeMailAddress>
    <payeeMailCity>?</payeeMailCity>
    <payeeMailState>?</payeeMailState>
    <payeeMailZip>?</payeeMailZip>
    <payAmount>?</payAmount>
    <payToType>?</payToType>
</payment>
<!--Project Notes)-->
<icNotes>
    <note>
        <noteAuthor>?</noteAuthor>
        <noteTimestamp>?</noteTimestamp>
        <noteType>?</noteType>
        <noteText>?</noteText>
    </note>
</icNotes>
</Project>
</proj:extract>
</soapenv:Body>
</soapenv:Envelope>

```

e. Response Record XML Example

Note: The same response record XML layout is used for all web services (Project, Workpackage/Job, and Document)

```
<processResponse REF_ID="Project Number">
  <processResult>SUCCESS</processResult>
  <status>
    <statusCode>Closed</statusCode>
    <statusDate>2018-09-14</statusDate>
  </status>
  <HardErrors/>
  <Warnings>
    <warning>
      <warningCode>10179</warningCode>
      <warningMessage>Gas savings do not meet Program
minimum</warningMessage>
    </warning>
  </Warnings>
</processResponse>
```

APPENDIX G: MASTER SAVINGS WORKBOOK

Refer to Excel Workbook: Appendix G_Consumers Energy_RFP Workbook_Savings_C&I

APPENDIX H: MASTER BUDGET WORKBOOK

Refer to Excel Workbook: Appendix H_Consumers Energy_RFP Workbook_Budget_C&I