

**EXHIBIT NO. ___(MBM-8HC)
DOCKETS UE-151871/UG-151872
PSE EQUIPMENT LEASING SERVICE
WITNESS: MALCOLM B. MCCULLOCH**

**BEFORE THE
WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION**

**WASHINGTON UTILITIES AND
TRANSPORTATION COMMISSION,**

Complainant,

v.

PUGET SOUND ENERGY,

Respondent.

**Dockets UE-151871
UG-151872**

**FIRST EXHIBIT (HIGHLY CONFIDENTIAL) TO THE
PREFILED REBUTTAL TESTIMONY OF
MALCOLM B. MCCULLOCH
ON BEHALF OF PUGET SOUND ENERGY**

**PUBLIC
VERSION**

JULY 1, 2016

BEFORE THE WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION

**Docket Nos. UE-151871 UG-151872
Puget Sound Energy's
Electric and Natural Gas Equipment Lease Service**

WUTC STAFF DATA REQUEST NO. 016

WUTC STAFF DATA REQUEST NO. 016:

Please provide all RFPs PSE issued with regard to the offering of the optional energy equipment lease service, and all responses PSE received to each RFP.

Response:

Attached as Attachment A to Puget Sound Energy's ("PSE") Response to WUTC Staff Data Request No. 016, please find PDF files of the 2015 and 2016 Request for Qualifications/ Quotations (RFQs) PSE issued with regard to the offering of the optional equipment lease service, inclusive of all responses received.

Attachment A.01	2016 RFQ Installation Partners
Attachment A.02	2016 RFQ Material Partners
Attachment A.03	2015 RFQ Installation Partners
Attachment A.04	2015 RFQ Material Partners

Due to the large size, Attachment A to PSE's Response to WUTC Staff Data Request No. 016 is provided in electronic format only.

Attachment A to PSE's Response to WUTC STAFF Data Request No. 016 is HIGHLY CONFIDENTIAL per Protective Order in WUTC Docket Nos. UE-151871 and UG-151872.

BEFORE THE WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION

**Docket Nos. UE-151871 UG-151872
Puget Sound Energy's
Electric and Natural Gas Equipment Lease Service**

WUTC STAFF DATA REQUEST NO. 016

"CONFIDENTIAL" Table of Contents

DR NO.	"CONFIDENTIAL" Material
016	Attachment A to PSE's Response to WUTC STAFF Data Request No. 016 is HIGHLY CONFIDENTIAL per Protective Order in WUTC Docket Nos. UE-151871 and UG-151872.

ATTACHMENT A to PSE's Response to WUTC STAFF Data Request No. 012

From: LeaseBid -- mail --
Sent: Wednesday, January 20, 2016 8:47 AM
To: LeaseBid -- mail --
Subject: RE: PSE Lease Solutions Program RFQual
Attachments: PSE WHHVAC-Request for Quals+Rate Sheet.doc

Dear valued partners,

We are excited to introduce an enhanced business opportunity for your consideration in connection to PSEs Lease Solutions service. To effectively deliver a comprehensive lease offer, that will expand participation in the existing market by current non-participants, PSE would like to work with its valued service partners to facilitate the equipment distribution and in-home fulfillment tasks, including pre-installation site checks, permitting, installation, maintenance, and repair services. In addition, the expanded Lease Solutions service will offer the flexibility for contracted service partners to also source and manage the equipment, should that choice be preferred.

Since you represent the values PSE strives for in delivering safe, dependable and efficient products and services to its customers, we need your help to effectively deliver this service.

The attached Request for Qualifications and Rates document provides the details of the service as well as embedded files for review and the rate sheets for your response(s). Please open each attachment to be fully informed of the process and access the forms for your response.

NOTE: One of the embedded files is a Non-Disclosure Agreement (NDA) that is to be printed, signed, scanned and returned with your email response if your company did not provide an NDA in 2015 during the previous RFQ interest.

As per the instructions in the RFQ, all questions about the program and bid process are to be submitted via email to this email address within the documented schedule. PSE looks forward to receiving your questions to enable clarification for all bidders, which will allow PSE to evaluate the responses equally.

Thank you for your interest in supporting PSE with the decisions to be made concerning the Lease Solutions service.

Sincerely,
PSE Lease Solutions Selection Team



REQUEST FOR QUALIFICATIONS AND RATE SHEET

Project: Energy Equipment Leasing

Statement of Need:

Puget Sound Energy, Inc. (PSE) is in need of qualified Service Partners to participate in PSE's new Leasing service under the Flexible Service Partner Structure as more fully described in Exhibit A. The Lease Solutions service is intended to expand the opportunities for all PSE customers to have access to energy efficient residential or commercial gas and electric water heaters and residential gas forced air furnaces and electric air-source heat pumps. For the Service Partners this program is intended to act as a source of qualified leads to install and maintain such systems or a leasing option to offer their clients.

PSE is a regulated utility and as such may only offer products, including leasing products established in advance and approved by the Washington State Utility Commission (WUTC).

Those firms, who meet the minimum qualifications to provide services, will be named Preferred Service Partners for the duration of this program. PSE's priority is to expand the availability of energy efficient systems in the PSE service area with maximum flexibility and opportunity for regional Service Partners to install and maintain these systems.

Evaluation Criteria for this Response:

The focus of PSE's evaluation will be on the relevant qualifications of your firm and ability to provide rate structures against which regulated leasing rates can be submitted and approved by the WUTC. Relevant qualifications include:

1. Retain active Tier 1 status in PSE's Contractor Alliance Network
 - a. Maintain active
 - i. WA State Business licenses
 - ii. Washington State Department of Labor and Industries registration
 - iii. Workers' Compensation and Employer's Liability insurance
2. Document Commercial and/or General Liability as well as Commercial Automobile Liability of \$2MM per occurrence
3. Demonstrate certified technical knowledge and experience for installation, maintenance, repair, replacement and disposal services of related products
4. Warrant service against faulty labor and/or defective material for a period of 180 days
5. Complete customer service calls within 24 hours of customer request
6. Complete customer site inspections/installations within 48 hours of customer acceptance

Submittal Instructions for this Response:

This Request is by PSE's invitation only. Responses from firms not expressly invited by PSE will not be considered. A responsive reply to this Request will include:

1. Completion of one or more Pricing Sheets (Exhibit B) from which regulated leasing rates will be established. Complete Residential and/or Commercial tabs for Paths and types of services to be offered by your firm.
2. Completed Non-Disclosure Agreement (NDA), Exhibit C
3. If Commercial pricing is provided, please provide (3) three references from companies with whom you provided similar service:
 - a. Name of Referenced Company
 - b. Contact Name, Title
 - c. Phone and email
 - d. Brief description of services provided
4. *Draft* PSE Service Partner Purchase Agreement comments, if any.

Do not include project approach documents or product sales collateral at this time. Upon review of submittals received, PSE may contact any or all of the firms regarding clarifications, further information, or interview scheduling. PSE also reserves the right to contract with multiple firms to fulfill its resource needs under this Request.

Schedule:

Activity:	Date:
Publish RFQ	Tuesday, January 19, 2016
Questions Due from Proposers	Friday, January 22, 2016 3:00 PT
PSE Answers Proposers Questions	Wednesday, January 27, 2016
RFQ Due	Tuesday, February 02, 2016 3:00 PT

Questions:

The release of the RFQ begins a quiet period for Bidders participating in this project. Bidders should not call PSE employees with the intent of discussing the project or asking questions regarding the RFQ.

However, we realize it is critical to provide Bidders with a vehicle to ask questions so that quality responses can be prepared. Responses to all questions will be provided in writing to all Bidders without identifying which company posed the question. The last date for question submittal to LeaseBid@pse.com is found above in the Schedule.

Submit RFQ responses electronically by end of business Tuesday, February 2, 2016 to:

LeaseBid@pse.com

All RFQ document costs shall be borne solely on the proposer and shall remain the property of PSE. All documents shall be kept confidential.

Exhibits:

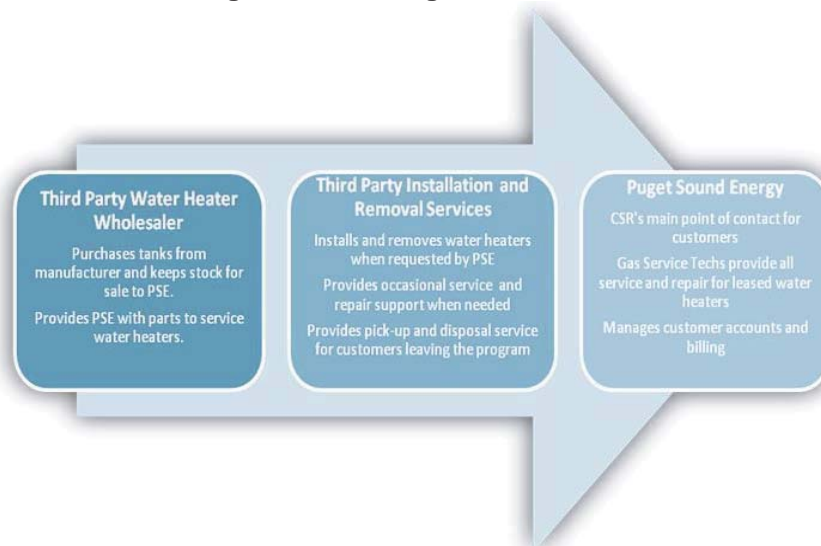
- A. Flexible Service Partner Structure
- B. Pricing Sheets for three (3) Service Partner Paths & Pricing Considerations
- C. PSE signed NDA for countersignature
- D. CAN service zones list
- E. Draft Service Partner Purchase Agreement

EXHIBIT A - FLEXIBLE SERVICE PARTNER STRUCTURE

Puget Sound Energy's existing Lease Services has been in operation since 1962, currently leasing gas water heaters and conversion burners to approximately 35,000 commercial and residential customers. Customers on the lease program pay a monthly fee that covers parts, repairs and replacements of the gas equipment. PSE contracts with a wholesaler to purchase the equipment and has a separate service contractor that provides all water heater replacement and removal services for the program. PSE gas service technicians provide all repair services for the program. PSE Customer Service Representatives are the touch point for contact with customers to coordinate service and manage customer accounts and billing.

Figure 1 illustrates how PSE currently works with service partners to operate the existing leasing program.

Figure 1 – Existing Lease Services



In 2016, PSE is expanding the Lease Solutions service to provide new lease offers to residential and commercial electric and natural gas customers for water heaters, as well as residential gas furnaces, and residential electric heat pumps. PSE endeavors to provide a best-in-class customer experience by matching product offerings with customer expectations. Based on market research and customer surveys, the lease offer will be structured to provide the below components:

- Energy efficient equipment choices
- Inclusive maintenance and repairs
- 24 hour customer service
- 24-48 hour service window
- Ability to transfer the lease when the property is sold

To effectively deliver a comprehensive lease offer that will expand participation in the existing market by current non-participants, PSE will engage its valued service partners to facilitate the equipment distribution and in-home fulfillment tasks, including pre-installation site checks, permitting, installation, maintenance, and repair services. PSE's processes will ensure that the service partner who performs the initial site check will be the same service partner responsible for the equipment through installation, maintenance, and service. This promotes a greater sense of continuity from the customer's perspective while simultaneously increasing the potential for repeat business for PSE's service partners.

In addition, the expanded Lease Solutions service will offer the flexibility for contracted service partners to also source and manage the equipment, should that choice be preferred. Figures 2 through 5 illustrate the service partner paths that may be contracted. All paths are available to all service partners, and each service partner can determine through this RFP process whether to contract with PSE through one, two, or all three paths simultaneously.

Figure 2 – Service Partner Paths

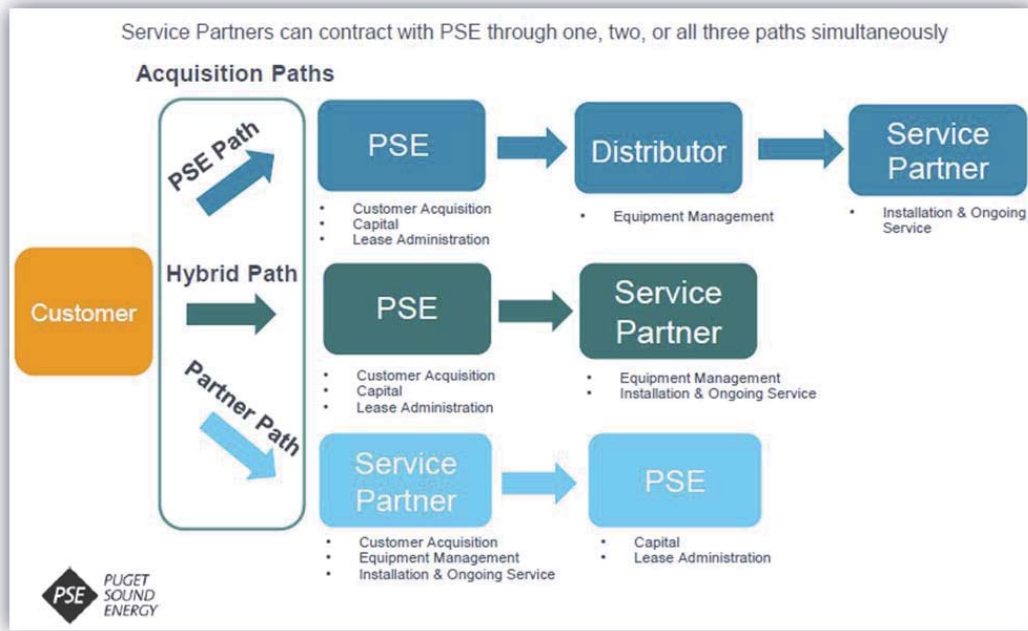


Figure 3 – PSE Path

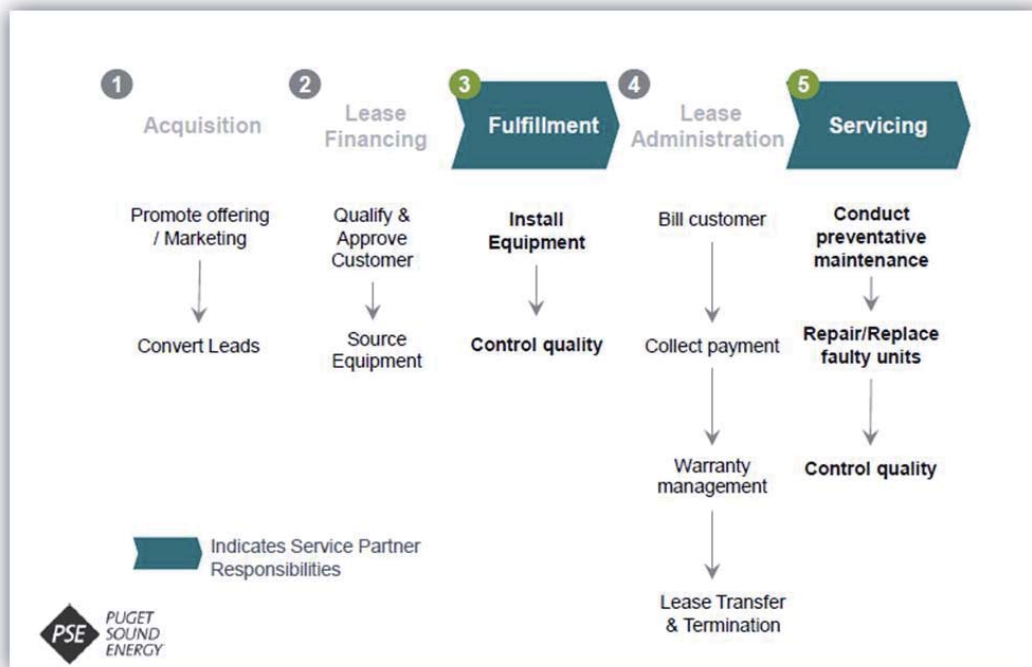


Figure 4 – Hybrid Path

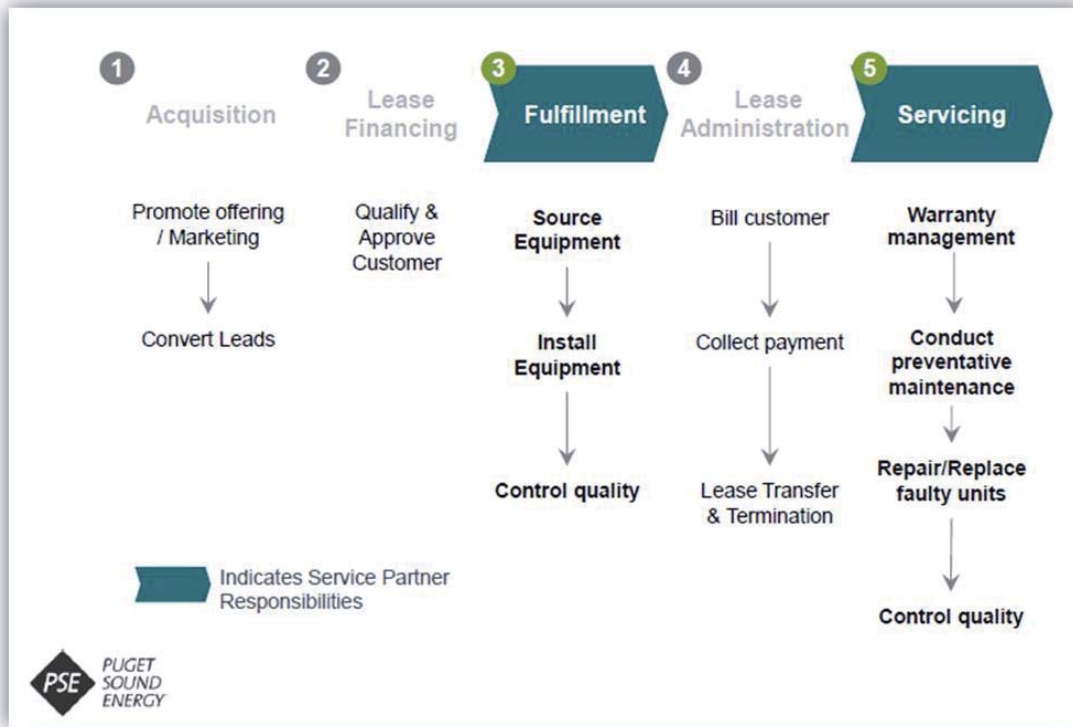
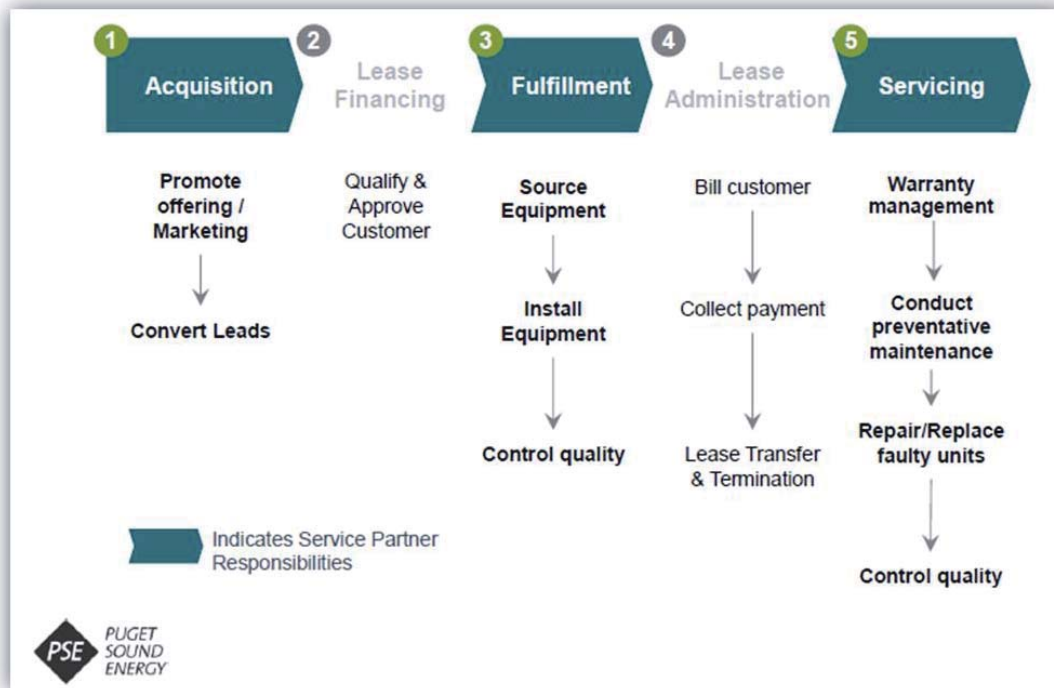


Figure 5 – Partner Path



PSE's goal is to create a partnership agreement and contract with local service partners who are capable of providing services for its leasing customers. PSE is looking to identify service partners that can provide a high level of service at a competitive price while addressing an innovated approach. Service Partner shall be responsible for providing pricing for services and/or a supply of the products listed in the bid sheets found in the Attachments Section 12 below. PSE intends to award contracts to support the lease program:

- A. For Figure 3 – PSE Path, PSE anticipates a three (3) year or five (5) year contract with a service partner to provide site inspection, permitting, installation, maintenance/repair services as well as supporting parts, and removal services for approved water heater and/or HVAC products. Service partners shall work closely with PSE's Lease Solutions Department and PSE's third party wholesalers to deliver the program.
- B. For Figure 4 – Hybrid Path, PSE anticipates a three (3) year or five (5) year contract with a service partner to supply equipment, provide site inspection, permitting, installation, maintenance/repair services as well as supporting parts, warranty management, and removal services for approved water heater and or HVAC products. Service partners shall work closely with PSE's Lease Solutions Department to deliver the program.
- C. For Figure 5 – Partner Path, PSE anticipates a three (3) year or five (5) year contract with a service partner to promote and manage customer acquisition, supply equipment, provide site inspection, permitting, installation, maintenance/repair services as well as supporting parts, warranty management, and removal services for approved water heater and or HVAC products. Service partners shall work closely with PSE's Lease Solutions Department to deliver the program.

After each Control Quality event referenced in Figures 2-5 above, Service Partner will bill PSE and PSE will remit payment per the terms of the Service Partner Purchase Agreement.

PRICING CONSIDERATIONS

- a. Service partner shall provide a high level of service at competitive pricing over the life of the contract to provide site inspection, permitting, installation, maintenance/repair services as well as supporting parts, and removal services.
- b. Service partner may provide, at its option, a high level of service at competitive pricing over the life of contract to supply approved equipment, and provide site inspection, permitting, installation, maintenance/repair services as well as supporting parts, warranty management, and removal services.
- c. Service partner may provide, at its option, a high level of service at competitive pricing over the life of contract to promote and manage customer acquisition, supply approved equipment, and provide site inspection, permitting, installation, maintenance/repair services as well as supporting parts, warranty management, and removal services.
- d. Service provider shall be responsible for completing customer service calls within 24 hour period during normal business hours defined as 7 a.m. to 5 p.m. Monday through Saturday.
- e. Service provider shall be responsible for completing customer site inspections and or installations within 48 hour period during normal business hours defined as 7 a.m. to 5 p.m. Monday through Saturday.
- f. No overtime or after hours shall be charged, unless approved by a PSE. No work shall be conducted on Sundays or holidays unless prior authorization is provided by

PSE. Holidays are observed as: New Year's Day, Memorial Day, July 4th, Labor Day, Thanksgiving, and Christmas.

- g. Prices shall remain firm and fixed for no less than one year with annual pricing reviews. Escalations require 30 days written notice, accompanied by documentation of underlying cost impact to supplier.
- h. Service partner shall not charge PSE a wasted trip fee.
- i. Service partner shall not charge PSE with a fuel surcharge fee.
- j. All work shall be performed by trained, competent personnel, in the accordance with the best commercial and industry practices that meet manufacturer's standard.
- k. Service partner shall provide quality installation and workmanship keeping both PSE and PSE's customer from experiencing any health, legal or catastrophic event which might put PSE or their customer at risk.
- l. Service partner shall obtain all necessary permits required by local jurisdiction upon installation. Permit numbers shall be included on all invoices or shall be kept on record by service provider. PSE reserves the right to audit permit records at any time.
- m. Precautions shall be exercised at all times for the protection of persons and property. Any fines levied for failure to comply with these requirements shall be borne solely by the responsible service partner.
- n. Service partner shall clean up the work area to the same or better conditions after any installation or service, and will follow all state and local requirements to ensure proper recycling and/or disposal of debris or waste materials.
- o. Service partner shall dispose of all residential and commercial equipment and parts removed under this contract in accordance with existing municipal, state and federal disposal standards.
- p. Service partner shall not reuse or reinstall any equipment or parts removed during the course of work performed under this contract. PSE reserves the right to request removed equipment and/or parts be returned to PSE.
- q. PSE requires identification stickers on all leased equipment. At the time of installation, service partner shall place an approved sticker supplied by PSE on the equipment if one is not already in place. This sticker identifies equipment as PSE's property.
- r. All parts utilized in conjunction with this proposal shall be new and shall meet original equipment manufacturers (OEM) specifications and shall restore the equipment so that it will perform to its original design specifications.
- s. In addition to all other warranties that may be supplied by proposer, the proposer shall warrant its service against faulty labor and/or defective material for a period of 180 days. This warranty requirement shall remain in force for the full warranty period.
- t. Service partner shall be solely responsible for procuring, paying for and maintaining any tools, equipment or supplies necessary or appropriate to provide services in accordance with the Program requirements.
- u. PSE requires service partners to provide monthly reporting of all tracked installations, disposals, warranties and code upgrades.

EXHIBIT B - PRICING SHEETS

1. PSE Path bid sheet



PSE_Path_Bid_Sheet
_Lease_Solutions_RF

2. Hybrid Path bid sheet



Hybrid_Path_Bid_Sh
heet_Lease_Solutions_

3. Partner Path bid sheet



Partner_Path_Bid_Sh
heet_Lease_Solutions_

All RFP document costs shall be borne solely on the proposer and shall remain the property of PSE. All documents shall be kept confidential.

EXHIBIT C - PSE SIGNED NDA FOR COUNTERSIGNATURE



Lease Solutions
NDA.pdf

Exhibit D – CAN Zone Lists



PSE Trade Ally
Service Zones, Exhibi

Exhibit E – Draft Service Partner Purchase Agreement



DRAFT Service
Partner Purchase Agr

BID SHEET INSTRUCTIONS

- * There are six tabs included in this bid sheet, each representing a separate product category.
- * Each tab includes details outlining what should and should not be included in each pricing category
- * All pricing should be entered as a flat rate, absent of taxes, unless noted otherwise
- * All input cells, defined below, must be completed for each product a proposer is submitting to manage

Input cells

Orange Cells - only these input cells should be edited

Application	Category	Type	Fuel	Capacity (kBtu/hr)	AFUE Efficiency (%)	Blower Motor	Combustion Stages	Product Certification	Standard Installation (Flat Rate)	Standard Maintenance-Every Two (2) Years (Flat Rate)	Repair & Service (Hourly labor rate)
Residential	HVAC	Forced Air Furnace	Gas	40	> 80	High Efficiency	Single				
Residential	HVAC	Forced Air Furnace	Gas	60	> 80	High Efficiency	Single				
Residential	HVAC	Forced Air Furnace	Gas	40	> 80	High Efficiency	Two				
Residential	HVAC	Forced Air Furnace	Gas	60	> 80	High Efficiency	Two				
Residential	HVAC	Forced Air Furnace	Gas	40	> 95	High Efficiency	Single	AHRI or ENERGY STAR Certified			
Residential	HVAC	Forced Air Furnace	Gas	60	> 95	High Efficiency	Single	AHRI or ENERGY STAR Certified			
Residential	HVAC	Forced Air Furnace	Gas	40	> 95	High Efficiency	Two	AHRI or ENERGY STAR Certified			
Residential	HVAC	Forced Air Furnace	Gas	60	> 95	High Efficiency	Two	AHRI or ENERGY STAR Certified			

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Perform leak loss & Manual J calculations 2. Take material measurement. 3. Verify installation will meet code (venting, combustion air, gas pipes, clearances, etc.) 4. Draft work order for installation 5. Schedule installation date 6. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 1. Conduct duct blaster 2. Shut off power 3. Shut off gas line and disconnect 4. Disconnect 115 v and 24 V wiring 5. Remove and dispose of old furnace 6. Design and build transitions 7. Cut sheet metal to transition points 8. Install furnace 9. Install new sheet metal, filter channel and standard filtration system 10. Seal internal and external joints 11. Install and/or reconnect venting 12. Hook up, inspect and test fuel line 13. Hook up, 115v wiring from J-box to furnace 14. Install fan switch or connect to t-stat 15. Hook up internal 24 v controls and t-stat 16. Fire off unit, check combustion and firing rate 17. Set fan speed, check all controls, run through heating cycle 18. Check combustion of water heater (if common venting used) 19. Check all safety operations 20. Clean site 21. Review T-stat settings with customer to optimize their goals/system performance 22. Discuss installation and operation with homeowner 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Craw space or attic installation 2. Relocation of furnace 3. Relocating gas line 4. Relocating venting over 5. Additional supply or return runs 6. Increasing duct size 7. Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o PVC/Condensate/ Condensate pump o Increasing gas line size per code o Securing gas line to code 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. T-stat relocation or rewiring installs 11. Installing new or smart t-stat 12. Advanced air filtration system 13. Controls add-ons (temperature/humidity sensor) 14. Cutting sheetrock 15. Relighting other appliances if fuel line removed past G valve 16. Whole house duct sealing 17. Air conditioning 	N/A
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Inspect, clean and lubricate blower assembly (includes blower housing, blower wheel and motor) 2. Check combustion blower housing for lint and debris and clean as necessary 3. Inspect, drain pan and condensate drain lines. Clean as needed 4. Test condensate pump 5. Check gas pressure and adjust as necessary 6. Inspect for gas leaks 7. Inspect burner assembly—clean and adjust as needed 8. Inspect ignition system and safety controls—clean and adjust as needed 9. Inspect heat exchanger or heating elements 10. Inspect flue system—check for proper attachment to the furnace, any disconnected sections, and for signs of corrosion. 11. Check Amp draw 12. Inspect control box, associated controls, wiring and connections 13. Clean or replace air filters 14. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 15. Check temperature rise 16. Check all safety operations 17. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Capacity (tons)	HSPF	SEER	Blower Motor	Product Certification	Standard Installation (Flat Rate)	Standard Maintenance-Every Two (2) Years (Flat Rate)	Repair & Service (Hourly labor rate)
Residential	HVAC	Heat Pump	Electric	2	>9	>14	High Efficiency Blower	AHRI Certified			
Residential	HVAC	Heat Pump	Electric	2.5	>9	>14	High Efficiency Blower	AHRI Certified			
Residential	HVAC	Heat Pump	Electric	3	>9	>14	High Efficiency Blower	AHRI Certified			

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Perform heat loss & Manual J calculations 2. Take material measurement 3. Verify installation will meet code 4. Draft work order for installation 5. Schedule installation date 6. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical & electrical) and associated labor and inspection time – where applicable 1. Conduct duct blaster 2. Shut off power 3. Disconnect wiring 4. Remove and dispose of old refrigerant and lines 5. Remove and dispose of old air handler and outdoor unit 6. Design and build transitions and fittings 7. Cut sheet metal to transition points 8. Install new air handler and indoor coil 9. Install new sheet metal, filter channel and standard filtration system 10. Seal internal and external joints 11. Install new outdoor unit 12. Install new R410A compatible refrigerant lines & refrigerant 13. Complete all electrical connections 14. Charge, inspect and test refrigerant lines 15. Check all controls, run through heating and cooling cycles 16. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 17. Check all safety operations 18. Cleanup 19. Discuss installation and operation with homeowner 	N/A
	Standard Installation		<ol style="list-style-type: none"> 1. Craw space or attic installation 2. Relocation of indoor air handler 3. Relocating outdoor unit 4. Pad for outdoor unit and ground prep 5. Relocating refrigerant line 6. Additional supply or return runs 7. Increasing duct size 8. Code upgrades <ol style="list-style-type: none"> a. Outdoor thermostat & lockout b. Condensate/ Condensate pump 9. T-stat relocation or rewiring installs 10. Installing new or smart T-stat 11. Advanced air filtration system 12. Sound Blanket for outdoor coil 13. Hard Start kit 14. Whole house duct sealing
STANDARD MAINTENANCE	Indoor Unit	<ol style="list-style-type: none"> 1. Inspect and clean blower assembly (includes blower housing, blower wheel and motor) 2. Inspect evaporator coil, drain pan and condensate drain lines. Clean as needed 3. Test condensate pump 4. Inspect refrigerant lines and connection 5. Check Amp draw 6. Inspect control box, associated controls, wiring and connections 7. Clean or replace air filters 8. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 9. Check all safety operations 	N/A
	Standard Maintenance	<ol style="list-style-type: none"> 1. Inspect unit for proper refrigerant level and adjust if necessary 2. Clean dirt, leaves and debris from inside cabinet 3. Inspect base pan for restricted drain openings - remove obstructions as necessary 4. Inspect coil and cabinet - clean as needed 5. Inspect fan motor and fan blades for wear and damage - lubricate as needed 6. Check outdoor temperature sensors 7. Inspect control box, associated controls/accessories, wiring and connections. Controls may include contactors, relays, circuit boards, capacitors, sump heat and other accessories. All control box and electrical parts should be checked for wear or damage. 8. Inspect compressor and associated tubing for damage 9. Check all safety operations 10. Discuss service with homeowner 	

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Venting	Product Certification	Standard Installation (Flat Rate)	Standard Maintenance - Years six (6) and Fifteen (15) (Flat Rate)	Repair & Service (Hourly labor rate)
Residential	Water Heat	Tank Style	Gas	40	≥ 0.65	Standard	ENERGY STAR Certified and Meets 2015 NAECA Standards			
Residential	Water Heat	Tank Style	Gas	50	≥ 0.65	Standard	ENERGY STAR Certified and Meets 2015 NAECA Standards			
Residential	Water Heat	Tank Style	Gas	40	≥ 0.65	Direct Vent	ENERGY STAR Certified and Meets 2015 NAECA Standards			
Residential	Water Heat	Tank Style	Gas	50	≥ 0.65	Direct Vent	ENERGY STAR Certified and Meets 2015 NAECA Standards			

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 2. Shut off power 3. Shut off gas line and disconnect 4. Check inlet water pressure 5. Disconnect wiring 6. Remove and dispose of old water heater 7. Install tank stand or plumb to the floor (do not include cost of stand) <ul style="list-style-type: none"> o Include 2 new water flex, 1 gas flex & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank 12. Fire off unit, check combustion and firing rate <ul style="list-style-type: none"> o Check combustion of furnace if common venting used 13. Set temperature and check all controls 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with homeowner 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Inspect ignition system and safety controls—clean and adjust as needed 2. Inspect burner assembly—clean and adjust as needed 3. Inspect flue system—check for proper attachment to the water heater, any dislocated sections, and for signs of corrosion 4. Check gas pressure and adjust as necessary 5. Inspect for gas leaks 6. Test (TPR) temperature-pressure-release valve 7. Check the anode rod 8. Drain the tank and flush out sediment 9. Fill tank 10. Check temperature and adjust to 120 degrees as necessary 11. Inspect control box, associated controls, wiring and connections 12. Inspect for water leaks 13. Check all safety operations 14. Clean site 15. Discuss service with homeowner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open loop systems 7. Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier Post o Water Alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Relighting other appliances if fuel line removed past G valve
STANDARD MAINTENANCE	Standard Maintenance		N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Product Certification	Product Capabilities	Standard Installation (Flat Rate)	Standard Maintenance - Years six (6) and Fifteen (15) (Flat Rate)	Repair & Service (Hourly labor rate)
Residential	Water Heat	Tank Style	Electric	40	> 0.95	ENERGY STAR Certified and 2015 NAECA Standards				
Residential	Water Heat	Tank Style	Electric	50	> 0.95	ENERGY STAR Certified and 2015 NAECA Standards				
Residential	Water Heat	Tank Style	Electric	40	> 0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CEA-2045*** or proprietary Modular Communications Interface (MCI) socket			
Residential	Water Heat	Tank Style	Electric	50	> 0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CEA-2045*** or proprietary Modular Communications Interface (MCI) socket			
Residential	Water Heat	Heat Pump	Electric	50	> 1.8*	NEEA Northern Climate Specification approved and 2015 NAECA Standards				
Residential	Water Heat	Heat Pump	Electric	50	> 1.8*	NEEA Northern Climate Specification approved and 2015 NAECA Standards	ANSI/CEA-2045*** or proprietary Modular Communications Interface (MCI) socket			

* Northern Climate Energy Factor
 ** <http://neea.org/docs/default-source/northern-climate-heat-pump-water-heater-specification/qualified-products-list.pdf>
 *** CEA-2045 socket

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Install tank stand or plumb to the floor (do not include cost of stand) 6. Install new water heater o Include 2 new water flex 7. Connect wiring with 2 new wire nuts 8. Fill Tank 9. Set temperature and check all controls 10. Check all safety operations 11. Clean site 12. Discuss installation and operation with homeowner 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Drain the tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with homeowner 	<ol style="list-style-type: none"> 1. Crawli space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Open loop systems 5. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier Post o Water Alarm o Relief line
STANDARD MAINTENANCE	Standard Maintenance		N/A

Application	Category	Type	Fuel	Size (gal.)	Capacity (kBtu/hr)	Energy Factor	Thermal Efficiency	Venting	Product Certification	Standard Installation (Flat Rate)	Standard Maintenance-Annual (Flat Rate)	Repair & Service (Hourly labor rate)
Commercial	Water Heat	Tank Style	Gas	50		≥ .67		Standard	ENERGY STAR Certified			
Commercial	Water Heat	Tank Style	Gas	50		≥ .67		Direct Vent	ENERGY STAR Certified			
Commercial	Water Heat	Tank Style	Gas	75	upto 199		≥ .95	Standard				
Commercial	Water Heat	Tank Style	Gas	75	upto 199		≥ .95	Direct Vent				
Costs Category	Cost component		What should be included in flat rates?					What should be excluded from flat rates, or considered as supplemental?				
STANDARD INSTALLATION	Site Check		<ol style="list-style-type: none"> 1. Verify installation will meet code (venting, combustion air, gas pipe, clearances, etc.) 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s) 					N/A				
	Permit Handling		<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 1. Shut off power 2. Shut off gas line and disconnect 3. Check inlet water pressure 4. Disconnect wiring 5. Remove and dispose of old water heater 6. Install tank stand or plumb to the floor (do not include cost of stand) 7. Install new water heater <ul style="list-style-type: none"> o Include 2 new water flex, 1 gas flex & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank <ul style="list-style-type: none"> o Fire off unit, check combustion and firing rate o Check combustion of furnace if common venting used 13. Set temperature and check all controls 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with owner 					N/A				
	Standard Installation		<ol style="list-style-type: none"> 1. Craw space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open loop systems 7. Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier post o Water alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Relighting other appliances if fuel line removed past G valve 									
STANDARD MAINTENANCE	Standard Maintenance		<ol style="list-style-type: none"> 1. Inspect ignition system and safety controls—clean and adjust as needed 2. Inspect burner assembly—clean and adjust as needed 3. Inspect flue system—check for proper attachment to the water heater, any dislocated sections, and for signs of corrosion 4. Check gas pressure and adjust as necessary 5. Inspect for gas leaks 6. Test (TPR) temperature-pressure-release valve 7. Check the anode rod 8. Drain the tank and flush out sediment 9. Fill tank 10. Check temperature and adjust to 120 degrees as necessary 11. Inspect control box, associated controls, wiring and connections 12. Inspect for water leaks 13. Check all safety operations 14. Clean site 15. Discuss service with owner 					N/A				

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Thermal Efficiency	Product Capabilities	Standard Installation (Flat Rate)	Standard Maintenance - Annual (Flat Rate)	Repair & Service (Hourly labor rate)
Commercial	Water Heat	Tank Style	Electric	50	> 0.95		ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket			
Commercial	Water Heat	Tank Style	Electric	75		> 97	ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket			

* CEA-2045 socket

Costs Category	Components	What should be included in flat rates	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Verify installation will meet code 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Install tank stand or plumb to the floor (do not include cost of stand) 6. Install new water heater <ul style="list-style-type: none"> o include 2 new water flex 7. Connect wiring with 2 new wire nuts 8. Fill tank 9. Set temperature and check all controls 10. Check all safety operations 11. Clean site 12. Discuss installation and operation with owner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Open loop systems 5. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier post o Water Alarm o Relief line
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Drain the tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with owner 	

BID SHEET INSTRUCTIONS

- * There are six tabs included in this bid sheet, each representing a separate product category.
- * Each tab includes details outlining what should and should not be included in each pricing category
- * All pricing should be entered as a flat rate, absent of taxes, unless noted otherwise
- * All input cells, defined below, must be completed for each product a proposer is submitting to manage

Input cells

Orange Cells - only these input cells should be edited

Application	Category	Type	Fuel	Capacity (Rst/yr)	AFUE Efficiency (%)	Blower Motor	Combustion Stages	Product Certification	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Maintenance - Every Two (2) Years (Flat Rate)	Repair & Service (Hourly labor rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	HVAC	Forced Air Furnace	Gas	40	> 80	High Efficiency	Single								
Residential	HVAC	Forced Air Furnace	Gas	60	> 80	High Efficiency	Single								
Residential	HVAC	Forced Air Furnace	Gas	40	> 80	High Efficiency	Two								
Residential	HVAC	Forced Air Furnace	Gas	60	> 80	High Efficiency	Two								
Residential	HVAC	Forced Air Furnace	Gas	40	> 95	High Efficiency	Single	AHRI or ENERGY STAR Certified							
Residential	HVAC	Forced Air Furnace	Gas	60	> 95	High Efficiency	Single	AHRI or ENERGY STAR Certified							
Residential	HVAC	Forced Air Furnace	Gas	40	> 95	High Efficiency	Two	AHRI or ENERGY STAR Certified							
Residential	HVAC	Forced Air Furnace	Gas	60	> 95	High Efficiency	Two	AHRI or ENERGY STAR Certified							

Costs Category	Cost Component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> Perform heat loss & Manual J calculations Take material measurement Verify installation will meet code (venting, combustion air, gas pipe, clearances, etc.) Draft work order for installation Schedule installation date Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable Conduct duct blaster Shut off power Shut off gas line and disconnect Disconnect 115 v and 24 v wiring Remove and dispose of old furnace Design and build transitions Cut sheet metal to transition points Install furnace Install (new metal) filter channel and standard filtration system Seal internal and external joints Soil removal and exterior joints Install and/or reconnect venting Hook up, inspect and test fuel line Hook up, 115v wiring from -box to furnace Install fan switch or connect to t-stat Hook up internal 24 v controls and t-stat Fire off unit, check combustion and firing rate Check combustion of water heater, if common venting used Set fan speed, check all controls, run through heating cycle Check all safety operations Clean site Review T-stat settings with customer to optimize their goals/system performance Discuss installation and operation with homeowner 	N/A
	Standard Installation	<ol style="list-style-type: none"> Extending gas line to code Securing gas line to code Priming and painting gas line T-stat relocation or rewiring installs Installing new or smart t-stat Advanced air filtration system Controls add-ons (temperature/humidity sensor) Cutting sheetrock Reighting other appliances if fuel line removed past G valve Whole house duct sealing Air conditioning 	
EQUIPMENT	Equipment	<ol style="list-style-type: none"> Source equipment to meet above specification Warehouse & inventory management Provide warranty management BTU rating on the pricing sheet indicates input BTU ECM motors or X-13 motors will considered high-efficiency for pricing purposes Inspect, clean and lubricate blower assembly (includes blower housing, blower wheel and motor) Check combustion blower housing for lint and debris and clean as necessary Inspect, drain pan and condensate drain lines. Clean as needed Test condensate pump Check gas pressure and adjust as necessary Inspect for gas leaks Inspect burner assembly—clean and adjust as needed Inspect ignition system and safety controls—clean and adjust as needed Inspect heat exchanger or heating elements Inspect flue system—check for proper attachment to the furnace, any dislocated sections, and for signs of corrosion. Check Amp draw Inspect control box, associated controls, wiring and connections Clean or replace air filters Fire unit from T-stat and review settings with customer to optimize their goals/system performance Check temperatures, rise Check all safety operations Discuss service with homeowner 	
STANDARD MAINTENANCE	Standard Maintenance		N/A

Application	Category	Type	Fuel	Capacity (tons)	HSPF	SEER	Blower Motor	Product Certification	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every Two (2) Years (Flat Rate)	Repair & Service (Hourly labor rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	HVAC	Heat Pump	Electric	2	> 9	> 14	High Efficiency Blower	AHRI Certified							
Residential	HVAC	Heat Pump	Electric	2.5	> 9	> 14	High Efficiency Blower	AHRI Certified							
Residential	HVAC	Heat Pump	Electric	3	> 9	> 14	High Efficiency Blower	AHRI Certified							

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Perform heat loss & Manual J calculations 2. Take material measurement 3. Verify installation will meet code 4. Draft work order for installation 5. Schedule installation date 6. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical & electrical) and associated labor and inspection time - where applicable 2. Conduct duct blaster 3. Shut off power 4. Disconnect wiring 5. Remove and dispose of old refrigerant and lines 6. Remove and dispose of old air handler and outdoor unit 7. Design and build transitions and fittings 8. Cut sheet metal to transition points 9. Install new air handler and indoor coil 10. Seal internal and external joints 11. Install new outdoor unit 12. Install new R410A compatible refrigerant lines & refrigerant 13. Complete all electrical connections 14. Charge, inspect and test refrigerant lines 15. Check all controls, run through heating and cooling cycles 16. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 17. Check all safety operations 18. Cleanup 19. Discuss installation and operation with homeowner 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Conal space or attic installation 2. Relocation of indoor air handler 3. Relocating outdoor unit 4. Pad for outdoor unit and ground prep 5. Relocating refrigerant line 6. Additional supply or return runs 7. Increasing duct size 8. Code upgrades <ul style="list-style-type: none"> o Outdoor thermostat & lockout o Condensate/ Condensate pump 9. T-stat relocation or rewiring installs 10. Installing new or smart t-stat 11. Advanced air filtration system 12. Sound Blanket for outdoor coil 13. Hard Start Kit 14. Whole house duct sealing 	
EQUIPMENT	Equipment	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 4. Include outdoor compressor, indoor coil, air-handler, new R410A compatible refrigerant lines and refrigerant in pricing 	<ol style="list-style-type: none"> 1. Note above
STANDARD MAINTENANCE	Standard Maintenance	<p>Indoor Unit</p> <ol style="list-style-type: none"> 1. Inspect and clean blower assembly (includes blower housing, blower wheel and motor) 2. Inspect evaporator coil, drain pan and condensate drain lines. Clean as needed 3. Test condensate pump 4. Inspect refrigerant lines and connection 5. Check Amp draw 6. Inspect control box, associated controls, wiring and connections 7. Clean or replace air filters 8. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 9. Check all safety operations <p>Outdoor Unit</p> <ol style="list-style-type: none"> 1. Inspect unit for proper refrigerant level and adjust if necessary 2. Clean dirt, leaves and debris from inside cabinet 3. Inspect base pan for restricted drain openings - remove obstructions as necessary 4. Inspect coil and cabinet - clean as needed 5. Inspect fan motor and fan blades for wear and damage - lubricate as needed 6. Check outdoor temperature sensors 7. Inspect control box, associated controls, wiring and connections. Controls may include contactors, relays, circuit boards, capacitors, sump heat and other accessories. All control box and electrical parts should be checked for wear or damage. 8. Inspect compressor and associated tubing for damage 9. Check all safety operations 10. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Venting	Product Certification	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Years six (6) and Fifteen (15) (Flat Rate)	Repair & Service (Hourly labor rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	Water Heat	Tank Style	Gas	40	>0.65	Standard	ENERGY STAR Certified and Meets 2015 IECC Standards							
Residential	Water Heat	Tank Style	Gas	50	>0.65	Standard	ENERGY STAR Certified and Meets 2015 IECC Standards							
Residential	Water Heat	Tank Style	Gas	40	>0.65	Direct Vent	ENERGY STAR Certified and Meets 2015 IECC Standards							
Residential	Water Heat	Tank Style	Gas	50	>0.65	Direct Vent	ENERGY STAR Certified and Meets 2015 IECC Standards							

Cost Category	Cost Component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Permit/Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time—where applicable 2. Shut off power 3. Check inlet gas line and disconnect 4. Disconnect wiring 5. Remove and dispose of old water heater 6. Install tank stand or plumb to the floor (do not include cost of stand) 7. Install new water heater <ul style="list-style-type: none"> o Include 2 new water flex, 1 gas flex, & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank 12. Fire off unit, check combustion and firing rate <ul style="list-style-type: none"> o Check combustion of furnace if common venting used 13. Set temperature and check all controls 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with homeowner 	N/A
	Equipment	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	<ol style="list-style-type: none"> 1. Craw space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open loop systems <ul style="list-style-type: none"> o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code 7. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier Post o Water Alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Reighting other appliances if fuel line removed past C value
STANDARD MAINTENANCE	Equipment	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	N/A
	Standard Maintenance	<ol style="list-style-type: none"> 1. Inspect ignition system and safety controls—clean and adjust as needed 2. Inspect burner assembly—clean and adjust as needed 3. Inspect flue system—check for proper attachment to the water heater, any disconnected sections, and for signs of corrosion 4. Check gas pressure and adjust as necessary 5. Inspect for gas leaks 6. Test (PR) temperature-pressure release valve 7. Check the anode rod 8. Fill the tank and flush out sediment 9. Fill the tank 10. Check temperature and adjust to 120 degrees as necessary 11. Inspect control box, associated controls, wiring and connections 12. Inspect for water leaks 13. Check all safety operations 14. Clean site 15. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Product Certification	Product Capabilities	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Years six (6) and fifteen (15) (Flat Rate)	Repair & Service (Hourly Labor Rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	Water Heat	Tank Style	Electric	40	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards								
Residential	Water Heat	Tank Style	Electric	50	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards								
Residential	Water Heat	Tank Style	Electric	40	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CEA-2005*** or proprietary Modular Communications Interface (MCI) socket							
Residential	Water Heat	Tank Style	Electric	50	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CEA-2005*** or proprietary Modular Communications Interface (MCI) socket							
Residential	Water Heat	Heat Pump	Electric	50	≥ 1.18*	Specification approved and 2015 NECA Northern Climate	ANSI/CEA-2005*** or proprietary Modular Communications Interface (MCI) socket							
Residential	Water Heat	Heat Pump	Electric	50	≥ 1.18*	Specification approved and 2015 NAECA Standards								

* Northern Climate Energy Factor
<http://www.northernclimate.com/resources/whitepapers/whitepaper-specification-qualified-products-list.pdf>
 ** CEA 2005 socket

Cost Category	Cost Component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Permit/Handling	1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Install tank stand or plumb to the floor (do not include cost of stand) 6. Install new water heater 7. Connect wiring with 2 new wire nuts 8. Fill tank 9. Test water heater and check all controls 10. Check all safety operations 11. Clean site 12. Discuss installation and operation with homeowner	N/A
	Standard Installation		1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Open loop systems 5. Code upgrades o Expansion tank o Drip pan o Antiquates straps & 2x4 bracing o Water alarm o Relief line
EQUIPMENT	Equipment	1. Source equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management	1. Note above
STANDARD MAINTENANCE	Standard Maintenance	1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Drain the tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with homeowner	N/A

Application	Category	Type	Fuel	Size (gal.)	Capacity (klb/hr)	Energy Factor	Thermal Efficiency	Venting	Product Certification	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance-Annual (Flat Rate)	Repair & Service (Hourly/labor rate)	Make (Brand)	Model	Warranty Term (Years)
Commercial	Water Heat	Tank Style	Gas	50		> 67		Standard	ENERGY STAR Certified							
Commercial	Water Heat	Tank Style	Gas	50		> 67		Direct Vent	ENERGY STAR Certified							
Commercial	Water Heat	Tank Style	Gas	75	upto 199		> 95	Standard								
Commercial	Water Heat	Tank Style	Gas	75	upto 199		> 95	Direct Vent								

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	1. Verify installation will meet code (venting, combustion air, gas pipe, clearances, etc.) 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s)	N/A
	Permit Handling	1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable	N/A
	Standard Installation	1. Shut off power 2. Shut off gas line and disconnect 3. Check inlet water pressure 4. Disconnect wiring 5. Remove and dispose of old water heater 6. Install tank stand or plumb to the floor (do not include cost of stand) 7. Install new water heater o Include 2 new water flex, 1 gas flex & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank 12. Fire off unit, check combustion and firing rate o Check combustion of furnace if common venting used 13. Set temperature and check all controls 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with owner	1. Craw space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open loop systems 7. Code upgrades o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier post o Water alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Re-lighting other appliances if fuel line removed past G valve 1. Note above
EQUIPMENT	Equipment	1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management	
STANDARD MAINTENANCE	Standard Maintenance	1. Inspect ignition system and safety controls—clean and adjust as needed 2. Inspect burner assembly—clean and adjust as needed 3. Inspect flue system—check for proper attachment to the water heater, any disconnected sections, and for signs of corrosion 4. Check gas pressure and adjust as necessary 5. Inspect for gas leaks 6. Test (TPR) temperature-pressure-release valve 7. Check the anode rod 8. Drain the tank and flush out sediment 9. Fill tank 10. Check temperature and adjust to 120 degrees as necessary 11. Inspect control box, associated controls, wiring and connections 12. Inspect for water leaks 13. Check all safety operations 14. Clean site 15. Discuss service with owner	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Thermal Efficiency	Product Capabilities	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Annual (Flat Rate)	Repair & Service (Hourly labor rate)	Make (Brand)	Model	Warranty Term (Years)
Commercial	Water Heat	Tank Style	Electric	50	> 0.95		ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket							
Commercial	Water Heat	Tank Style	Electric	75		≥ 97	ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket							

* CEA-2045 socket

Costs Category	Components	What should be included in flat rates	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Verify installation will meet code 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Install tank stand or plumb to the floor (do not include cost of stand) 6. Install new water heater 7. Connect wiring with 2 new wire nuts 8. Fill tank 9. Set temperature and check all controls 10. Check all safety operations 11. Clean site 12. Discuss installation and operation with owner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Open loop systems 5. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier post o Water Alarm o Relief line
EQUIPMENT	Equipment	<ol style="list-style-type: none"> 1. Source equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	<ol style="list-style-type: none"> 1. Note above
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Drain the tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with owner 	

BID SHEET INSTRUCTIONS

- * There are six tabs included in this bid sheet, each representing a separate product category.
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Input cells

Orange Cells - only these input cells should be edited

Application	Category	Type	Fuel	Capacity (btu/hr)	AFUE Efficiency (%)	Blower Motor	Combustion Stages	Product Certification	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every 6 Months (Flat Rate)	Repair & Service (Hourly Labor Rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	HVAC	Forced Air Furnace	Gas	40	> 80	High Efficiency	Single									
Residential	HVAC	Forced Air Furnace	Gas	60	> 80	High Efficiency	Single									
Residential	HVAC	Forced Air Furnace	Gas	40	> 80	High Efficiency	Two									
Residential	HVAC	Forced Air Furnace	Gas	60	> 80	High Efficiency	Two	AHR or ENERGY STAR Certified								
Residential	HVAC	Forced Air Furnace	Gas	40	> 95	High Efficiency	Single	AHR or ENERGY STAR Certified								
Residential	HVAC	Forced Air Furnace	Gas	60	> 95	High Efficiency	Single	AHR or ENERGY STAR Certified								
Residential	HVAC	Forced Air Furnace	Gas	40	> 95	High Efficiency	Two	AHR or ENERGY STAR Certified								
Residential	HVAC	Forced Air Furnace	Gas	60	> 95	High Efficiency	Two	AHR or ENERGY STAR Certified								

Cost Category	Cost Component	What should be included in flat rate?	What should be excluded from flat rates, or considered as supplement?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> 1. Conduct customer outreach activities. 2. Identify potential customers and conduct eligibility assessment 3. Coordinate customer qualification and approval process with PSE 4. Secure customer signature on PSE form(s) 	N/A
	Site Check	<ol style="list-style-type: none"> 1. Perform heat loss & Manual J calculations 2. Take material measurement 3. Verify installation will meet code (venting combustion air gas pipe clearances etc.) 4. Confirm work order for installation 5. Scope out work 6. Secure customer signature on PSE form(s) as appropriate 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable 	N/A
STANDARD INSTALLATION	Standard Installation	<ol style="list-style-type: none"> 1. Conduct duct blaster 2. Shut off power 3. Shut off gas line and disconnect 4. Disconnect 115v and 24 V wiring 5. Remove and dispose of old furnace 6. Remove old gas line and vent pipe 7. Get sheet metal to transition points 8. Install furnace 9. Install new sheet metal filter channel and standard filtration system 10. Seal internal and external joints 11. Install and/or reconnect venting 12. Hook up inspect and test fuel line 13. Hook up inspect and test gas line 14. Install fan switch or connect to T-stat 15. Hook up internal 24v controls and T-stat 16. Fire off unit check combustion and firing rate 17. Set fan speed, check all controls run through heating cycle 18. Check a safety operations 19. Check for gas leaks 20. Review T-stat settings with customer to optimize their goals/system performance 21. Discuss installation and operation with homeowner 	<ol style="list-style-type: none"> 1. Crwl space or attic installation 2. Relocating of furnace 3. Relocating gas line 4. Relocating venting cover 5. Relocating gas return runs 6. Increasing duct size 7. Code upgrades 8. Adding combustion air 9. PVC/Condensate/ Condensate pump 10. Increasing gas line size per code 11. Extending gas lines for additional appliances 12. Priming and painting gas line 13. T-stat relocation or rewiring installs 14. Installing new or smart T-stat 15. Advanced air filtration system 16. Controls add-ons (temperature/humidity sensor) 17. Relocating gas return runs 18. Relocating other appliances if fuel line removed past G valve 19. Whole house duct sealing 20. Air conditioning
	Equipment	<ol style="list-style-type: none"> 1. Source equipment to meet blower specification 2. Warehouse & inventory management 3. Provide warranty management 4. BTU rating on the pricing sheet indicates input BTU 5. ECM motors or X-13 motors will be considered high-efficiency for pricing purposes 	
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Inspect clean and lubricate blower assembly (includes blower housing, blower wheel and motor) 2. Check combustion blower housing for fat and debris and clean as necessary 3. Inspect drain pan and condensate drain lines. Clean as needed 4. Check gas pressure and adjust as necessary 5. Check gas pressure and adjust as necessary 6. Inspect for gas leaks 7. Inspect burner assembly—clean and adjust as needed 8. Inspect ignition system and safety controls—clean and adjust as needed 9. Inspect heat exchanger or heating elements 10. Inspect fuse system—check for proper attachment to the furnace any dislocated sections and for proper wire connections 11. Check Amp draw 12. Inspect control box, associated controls, wiring and connections 13. Clean or replace air filters 14. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 15. Check temperature rise 16. Check for gas leaks 17. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Capacity (tons)	HSFP	SEER	Blower Motor	Product Certification	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every Two (2) Years (Flat Rate)	Repair & Service (Hourly/Labor Rate)	Makes (Brands)	Model	Warranty Term (Years)
Residential	HVAC	Heat Pump	Electric	2	> 9	> 14	High Efficiency Blower	AHRI Certified								
Residential	HVAC	Heat Pump	Electric	2.5	> 9	> 14	High Efficiency Blower	AHRI Certified								
Residential	HVAC	Heat Pump	Electric	3	> 9	> 14	High Efficiency Blower	AHRI Certified								

Costs Category	Cost Component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> 1. Conduct customer outreach activities 2. Identify potential customers and conduct eligibility assessment 3. Coordinate customer qualification and approval process with PSE 4. Secure customer signature on PSE form(s) 	N/A
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Perform heat loss & Manual J calculations 2. Take material measurement 3. Verify installation will meet code 4. Draft work order for installation 5. Schedule installation date 6. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical & electrical) and associated labor and inspection time - where applicable 1. Conduct duct blaster 2. Shut off power 3. Disconnect wiring 4. Remove and dispose of old refrigerant and lines 5. Remove and dispose of old air handler and outdoor unit 6. Design and build transitions and fittings 7. Cut sheet metal to transition points 8. Install new air handler and/or coil 9. Install new electrical blower cabinet and standard filtration system 10. Seal internal and external joints 11. Install new outdoor unit 12. Install new R410A compatible refrigerant lines & refrigerant 13. Complete all electrical connections 14. Charge, inspect and test refrigerant lines 15. Check all controls, run through heating and cooling cycles 16. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 17. Check all safety operations 18. Cleanup 19. Discuss installation and operation with homeowner 	<ol style="list-style-type: none"> 1. Craw space or attic installation 2. Relocation of indoor air handler 3. Relocating outdoor unit 4. Pad for outdoor unit and ground prep 5. Relocating refrigerant line 6. Additional supply or return runs 7. Increasing duct size 8. Coil upgrades 9. Condensate treatment & lockout 10. Condensate/ Condensate pump 11. T-stat relocation or rewiring installs 10. Installing new or smart stat 11. Advanced air filtration system 12. Sound Blanket for outdoor coil 13. Hard Start Kit 14. Whole house duct sealing
EQUIPMENT	Equipment	<ol style="list-style-type: none"> 1. Source equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 4. Include outdoor compressor, indoor coil, air handler, new R410A compatible refrigerant lines and refrigerant in pricing 	<ol style="list-style-type: none"> 1. Note above
STANDARD MAINTENANCE	Standard Maintenance	<p>Indoor Unit</p> <ol style="list-style-type: none"> 1. Clean blower assembly (includes blower housing, blower wheel and motor) 2. Inspect evaporator coil, drain pan and condensate drain lines. Clean as needed 3. Test condensate pump 4. Inspect refrigerant lines and connection 5. Check Amp draw 6. Inspect control box, associated controls, wiring and connections 7. Clean or replace air filters 8. Fire unit from T-stat and review settings with customer to optimize their goal/system performance <p>Outdoor Unit</p> <ol style="list-style-type: none"> 1. Inspect unit for proper refrigerant level and adjust if necessary 2. Clean dirt, leaves and debris from inside cabinet 3. Inspect base pan for restricted drain openings - remove obstructions as necessary 4. Inspect coil and cabinet - clean as needed 5. Check for excessive wear and damage - lubricate as needed 6. Check outdoor temperature sensor wear and damage 7. Inspect control box, associated controls/accessories, wiring and connections. Controls may include capacitors, relays, circuit boards, capacitors, sump heat and other accessories. All control box and electrical parts should be checked for wear or damage. 8. Inspect compressor and associated tubing for damage 9. Check all safety operations 10. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Venting	Product Certification	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - (Every 12 Years) (Flat Rate)	Repair & Service (Hourly/Labor rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	Water Heat	Tank Style	Gas	40	>0.65	Standard	ENERGY STAR Certified and Meets 2015 IECC Standards								
Residential	Water Heat	Tank Style	Gas	50	>0.65	Standard	ENERGY STAR Certified and Meets 2015 IECC Standards								
Residential	Water Heat	Tank Style	Gas	40	>0.65	Direct Vent	ENERGY STAR Certified and Meets 2015 IECC Standards								
Residential	Water Heat	Tank Style	Gas	50	>0.65	Direct Vent	ENERGY STAR Certified and Meets 2015 IECC Standards								

Cost Category	Cost Component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> 1. Conduct customer outreach activities 2. Identify potential customers and conduct eligibility assessment 3. Coordinate customer qualification and approval process with PSE 4. Secure customer signature on PSE form(s) 	N/A
STANDARD INSTALLATION	Permit/Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable 1. Shut off power 2. Shut off gas line and disconnect 3. Check inlet water pressure 4. Disconnect existing gas line 5. Disconnect existing gas line of old water heater 6. Install tank stand or plumb to the floor (do not include cost of stand) 7. Install new water heater <ul style="list-style-type: none"> o Include 2" new water flex, 1" gas flex & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill tank 12. Check combustion and firing rate 13. Check combustion of furnace if common venting used 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with homeowner 	<ol style="list-style-type: none"> 1. Craw space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open fire systems 7. Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code o Expansion tank o Drip pan o Gas line straps & 2x4 bracing o Barrier Post o Water Alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Realigning other appliances if fuel line removed past G valve
	Equipment	<ol style="list-style-type: none"> 1. Source equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	N/A
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Inspect ignition system and safety controls—clean and adjust as needed 2. Inspect burner assembly—clean and adjust as needed 3. Inspect flue system—check for proper attachment to the water heater, any disconnected sections and for signs of corrosion 4. Check gas pressure and adjust as necessary 5. Inspect for gas leaks 6. Check for gas leaks—pressure-release valve 7. Check the spider rod 8. Drain the tank and flush out sediment 9. Fill tank 10. Check temperature and adjust to 120 degrees as necessary 11. Inspect control box, associated controls, wiring and connections 12. Inspect for water leaks 13. Check all safety operations 14. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal)	Energy Factor	Product Certification	Product Capabilities	Customer Application (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every Two (2) Years (Flat Rate)	Repair & Service (hourly labor rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	Water Heat	Tank Style	Electric	40	≥0.95	ENERGY STAR Certified and 2015 NAECA Standards									
Residential	Water Heat	Tank Style	Electric	50	≥0.95	ENERGY STAR Certified and 2015 NAECA Standards									
Residential	Water Heat	Tank Style	Electric	40	≥0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CEA-2005*** or proprietary Modular Communications Interface (MCI) socket								
Residential	Water Heat	Tank Style	Electric	50	≥0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CEA-2005*** or proprietary Modular Communications Interface (MCI) socket								
Residential	Water Heat	Heat Pump	Electric	50	≥1.8*	NEE Northern Climate Specification approved and 2015 NAECA Standards									
Residential	Water Heat	Heat Pump	Electric	50	≥1.8*	NEE Northern Climate Specification approved and 2015 NAECA Standards	ANSI/CEA-2005*** or proprietary Modular Communications Interface (MCI) socket								

* Northern Climate Energy Factor
 ** <http://ceca.org/ceca/industry-source-of-northern-climate-heat-pump-water-heater-specification-goal-product-list.asp>
 *** CECA-2005 socket

Cost Category	Cost Component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> 1. Create a customer checklist, including: <ol style="list-style-type: none"> 1. Identify potential customers, and product eligibility assessment. 2. Coordinate customer qualification and approval process with PSE 3. Coordinate customer qualification and approval process with PSE 4. Secure customer signature on PSE forms) 	N/A
STANDARD INSTALLATION	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Prepare floor for new water heater to the floor (do not include cost of stand) 6. Install new water heater o Include 2 new water filler 7. Connect wiring with 2 new wire nuts 8. Fill Tank 9. Set temperature and check all controls 10. Test for safety operations 11. Clean site 12. Discuss installation and operation with homeowner 	<ol style="list-style-type: none"> 1. Crawlspace or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocation of venting system 5. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Burner Proot o Gas safety alarm o Relief line
EQUIPMENT	Equipment	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & Inventory management 3. Provide warranty management 	N/A
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Flush tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal)	Capacity (kBu/hr)	Energy Factor	Thermal Efficiency	Venting	Product Certification	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every Two (2) Years (Flat Rate)	Repair & Service (Hourly labor rate)	Model	Warranty Term (Years)
Commercial	Water Heat	Tank Style	Gas	50		≥ 67	Standard	Standard	ENERGY STAR Certified							
Commercial	Water Heat	Tank Style	Gas	50		≥ 67	Direct Vent	Direct Vent	ENERGY STAR Certified							
Commercial	Water Heat	Tank Style	Gas	75	upto 199	≥ 95	Standard	Standard								
Commercial	Water Heat	Tank Style	Gas	75	upto 199	≥ 95	Direct Vent	Direct Vent								

Costs Category	Cost Component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> 1. Conduct customer outreach activities 2. Identify potential customers and conduct eligibility assessment 3. Coordinate customer qualification and approval process with PSE 4. Secure customer signature on PSE form(s) 	N/A
	Site Check	<ol style="list-style-type: none"> 1. Verify installation will meet code (venting, combustion air, gas pipe, etc.) 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time—where applicable 1. Shut off power 2. Shut off gas line and disconnect 3. Check inlet water pressure 4. Disconnect wiring 5. Remove and dispose of old water heater 6. Install tanks/stand or pump to the floor (do not include cost of stand) 7. Install vent pipe to roof 8. Include 2" new water flow, 1 gas line & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank 12. Fire off unit, check combustion and firing rate 13. Check combustion of furnace if common venting used 13. Set temperature and check all controls 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with owner 	<ol style="list-style-type: none"> 1. Cover space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open loop systems 7. Code upgrades 8. Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code o Expansion tank o Drip pan o Barnhooks, straps & 2"x4 bracing o Termite pest o Water alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Relighting other appliances if fuel line removed past G valve
EQUIPMENT	Equipment	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	<ol style="list-style-type: none"> 1. Note above
	Standard Maintenance	<ol style="list-style-type: none"> 1. Inspect ignition system and safety controls—clean and adjust as needed 2. Inspect burner assembly—clean and adjust as needed 3. Inspect flue system—check for proper attachment to the water heater, any disconnected sections, and for signs of corrosion 4. Check gas pressure and adjust as necessary 5. Inspect for gas leaks 6. Test (TPR) temperature-pressure-release valve 7. Check the anode rod 8. Drain the tank and flush out sediment 9. Fill tank 10. Check temperature and adjust to 120 degrees as necessary 11. Inspect control box, associated controls, wiring and connections 12. Inspect for water leaks 13. Check all safety operations 14. Discuss safety with owner 15. Discuss service with owner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Thermal Efficiency	Product Capabilities	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every Two (2) Years (Flat Rate)	Repair & Service (Hourly labor rate)	Make (Brand)	Model	Warranty Term (Years)
Commercial	Water Heat	Tank Style	Electric	50	> 0.95		ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket								
Commercial	Water Heat	Tank Style	Electric	75	> 97		ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket								

* CEA-2045 socket

Costs Category	Components	What should be included in flat rates	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> Conduct customer outreach activities Identify potential customers and conduct eligibility assessment Coordinate customer qualification and approval process with PSE Secure customer signature on PSE form(s) 	N/A
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> Verify installation will meet code Draft work order for installation Schedule installation date Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable Shut off power Disconnect wiring Check inlet water pressure Remove and dispose of old water heater Install tank stand or plumb to the floor (do not include cost of stand) Install new water heater Include 2 new water flex Connect wiring with 2 new wire nuts Fill tank Set temperature and check all controls Check all safety operations Clean site Discuss installation and operation with owner 	N/A
	Standard Installation	<ol style="list-style-type: none"> Crawl space or attic installation Relocation of water heater Relocation of plumbing lines Open loop systems Code upgrades <ul style="list-style-type: none"> Expansion tank Drip pan Earthquake straps & 2x4 bracing Barrier post Water Alarm Relief line 	
EQUIPMENT	Equipment	<ol style="list-style-type: none"> Source Equipment to meet above specification Warehouse & inventory management Provide warranty management 	<ol style="list-style-type: none"> Note above
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> Test (TPR) temperature-pressure-release valve Check the anode rod Drain the tank and flush out sediment Fill tank Check temperature and adjust to 120 degrees as necessary Inspect control box, associated controls, wiring and connections Inspect for water leaks Check all safety operations Clean site Discuss service with owner 	



MUTUAL NONDISCLOSURE AGREEMENT

Puget Sound Energy, Inc. a Washington corporation with offices at 10885 NE 4th St., Bellevue, WA ("PSE") and the "Other Party" identified on the signature page below are considering a business transaction (the "Transaction"). In connection with the proposed Transaction, the parties are willing to disclose confidential information to each other on the terms and conditions stated in this agreement (this "Agreement").

The parties, intending to be legally bound, agree that:

I. Confidentiality.

1. In connection with the Transaction, each party (a "Disclosing Party") is prepared to make available to the other party (a "Receiving Party") certain Confidential Information regarding the Disclosing Party's business. The Receiving Party agrees to keep such information confidential, and protect all Confidential Information from disclosure by using the highest practical degree of care and at least the same care the Receiving Party uses to protect its own confidential information.

2. "Confidential Information" means: (i) any and all information with respect to the status of or the terms of the Transaction, and (ii) any trade secrets or other confidential or proprietary information of the Disclosing Party, whether of a technical, business or other nature (including, without limitation, the relationship between the parties, and information relating to the Disclosing Party's technology, software, products, services, designs, methodologies, know how, business plans, finances, marketing plans, customers, employees, prospects or other affairs). Confidential Information also includes any information that has been made available to the Disclosing Party by third parties that the Disclosing Party is obligated to keep confidential.

3. Receiving Party may not disclose Confidential Information to third parties; provided, however, that notwithstanding the foregoing, Receiving Party may disclose Confidential Information to its employees, consultants, advisors, or other agents (its "Representatives") only to the extent necessary for such Representatives to assist the Receiving Party in evaluating the Transaction, provided that such Representatives agree to keep such Confidential Information confidential in accordance with this Agreement. A breach of this Agreement by a Representative of Receiving Party will be deemed a breach by the Receiving Party, and Receiving Party agrees, at its sole expense, to take all reasonable measures (including but not limited to court proceedings) to restrain its Representatives from prohibited or unauthorized disclosure of the Confidential Information. Receiving Party shall immediately notify Disclosing Party of any actual, probable or reasonably suspected disclosure or unauthorized access to the Disclosing Party's Confidential Information.

4. Receiving Party will not use or allow others to use Confidential Information for any purpose other than evaluating the Transaction.

5. At Disclosing Party's request, Receiving Party will return all materials furnished by Disclosing Party that contain Confidential Information and will destroy or deliver to Disclosing Party any other materials containing Confidential Information, including materials prepared by Receiving Party, unless such Confidential Information is required to be retained by the Receiving Party to comply with applicable law, regulatory requirements or internal document retention policies. Notwithstanding the foregoing, the parties acknowledge that Receiving Party's computer systems may automatically back-up and retain electronic copies of the Confidential Information. To the extent that such systems create copies of the Confidential Information, the Receiving Party may retain such copies in its archival or back-up computer storage. If the Receiving Party retains a copy of any Confidential Information for any reason, including copies on electronic

backup media, then such information shall in all respects remain subject to the terms and conditions of this Agreement.

6. The provisions of this Part I shall not apply to Confidential Information that: (a) is or becomes publicly available through no fault of Receiving Party; (b) is or has been received in good faith by Receiving Party without restriction on use or disclosure from a third party having no obligation of confidentiality to Disclosing Party; or (c) is or has been independently developed by Receiving Party without reference to Confidential Information received from Disclosing Party, as evidenced by Receiving Party's written records.

7. The fact that portions of Confidential Information may be publicly available or otherwise not subject to this Agreement will not affect Receiving Party's obligations with respect to the remaining portion.

8. If Receiving Party is required by judicial or administrative process to disclose Confidential Information, Receiving Party shall promptly notify Disclosing Party and allow Disclosing Party a reasonable time to oppose such process. If disclosure is nonetheless required, Receiving Party may disclose only the Confidential Information that, in the written opinion of counsel acceptable to Disclosing Party, Receiving Party is legally required to disclose. Receiving Party shall use its best efforts to limit the dissemination of Confidential Information that is disclosed.

9. This Agreement will not apply to information disclosed to Receiving Party after Receiving Party receives written notice from Disclosing Party that further disclosures will not be treated as confidential.

10. In providing Confidential Information pursuant to this Agreement, Disclosing Party makes no representation, either express or implied, as to adequacy, sufficiency, or freedom from fault of such Confidential Information and incurs no responsibility nor obligation whatsoever by reason thereof, and the furnishing of such Confidential Information will not convey any rights or license with respect to such Confidential Information.

II. No Commitment to Enter Into Transaction. The parties acknowledge that nothing in this Agreement is intended to create or constitute any agency or partnership among the parties, or any legally binding obligation for either party to enter into, or negotiate to enter into, the Transaction.

III. Miscellaneous.

1. This Agreement shall continue in full force and effect for two (2) years from the Effective Date, unless terminated earlier or extended by mutual agreement of the parties.

2. In the event of a default under this Agreement, the non-breaching party will be entitled to injunctive relief, without posting bond, in addition to any other available remedies, including damages. In any litigation concerning this Agreement, the prevailing party will be entitled to recover all reasonable expenses of litigation, including reasonable attorney fees at trial and on any appeal.

3. Any failure by a party to enforce another party's strict performance of any provision of this Agreement will not constitute a waiver of its right to subsequently enforce such provision or any other provision of this Agreement.

4. This Agreement will be governed by and construed and enforced in accordance with the internal laws of the state of Washington, without regard to contrary principles of conflicts of law. The federal and state courts within the State of Washington shall have exclusive jurisdiction to adjudicate any dispute arising out of and relating to this Agreement. Venue for purposes of any litigation arising under this Agreement will be in King County, Washington.

5. All additions or modifications to this Agreement must be in writing and executed by all parties.

EFFECTIVE DATE: January 19, 2016

Puget Sound Energy, Inc.

Authorized Signature: Jill R. Larson, MBA, CPSM

Name: Jill R. Larson, MBA, CPSM

Title: Senior Buyer

Date: January 19, 2016

Other Party: _____

Authorized Signature: _____

Name: _____

Title: _____

Date: _____

Puget Sound Energy Trade Ally Service Zones

Zone	City	Zip Code	Zone	City	Zip Code
Zone #01	Toledo/Mossy Rock	98591	Zone #09	Kitsap Peninsula	98329
	Toledo/Mossy Rock	98596		Kitsap Peninsula	98332
Zone #02	Centralia	98531		Kitsap Peninsula	98335
Zone #03	Chehalis	98532		Kitsap Peninsula	98388
	Chehalis	98568	Zone #10	Federal Way/Auburn	98001
Zone #04	Little Rock/Bucoda	98530		Federal Way/Auburn	98003
	Little Rock/Bucoda	98576		Federal Way/Auburn	98023
	Little Rock/Bucoda	98579	Zone #11	Auburn/Black Diamond	98002
	Little Rock/Bucoda	98589		Auburn/Black Diamond	98010
Little Rock/Bucoda	98597	Auburn/Black Diamond		98047	
Auburn/Black Diamond		Auburn/Black Diamond		98051	
Zone #05	Olympia/Lacey	98501	Auburn/Black Diamond	98092	
	Olympia/Lacey	98502	Zone #12	Enumclaw	98022
	Olympia/Lacey	98503		Zone #13A	Seattle Metro North
	Olympia/Lacey	98506	Seattle Metro North		98102
	Olympia/Lacey	98512	Seattle Metro North		98103
	Olympia/Lacey	98513	Seattle Metro North		98104
Olympia/Lacey	98516	Seattle Metro North	98105		
Zone #06	Graham/Orting	98328	Seattle Metro North		98107
	Graham/Orting	98338	Seattle Metro North		98109
	Graham/Orting	98344	Seattle Metro North		98112
	Graham/Orting	98558	Seattle Metro North		98119
	Graham/Orting	98580	Seattle Metro North		98121
Zone #07	Puyallup/Lake Tapps	98321	Seattle Metro North	98122	
	Puyallup/Lake Tapps	98323	Seattle Metro North	98174	
	Puyallup/Lake Tapps	98360	Seattle Metro North	98195	
	Puyallup/Lake Tapps	98371	Seattle Metro North	98199	
	Puyallup/Lake Tapps	98372	Zone #13B	Seattle Metro South	98106
	Puyallup/Lake Tapps	98374		Seattle Metro South	98108
	Puyallup/Lake Tapps	98375		Seattle Metro South	98116
	Puyallup/Lake Tapps	98385		Seattle Metro South	98118
	Puyallup/Lake Tapps	98390		Seattle Metro South	98126
	Puyallup/Lake Tapps	98391		Seattle Metro South	98134
	Puyallup/Lake Tapps	98396		Seattle Metro South	98136
Seattle Metro South		Seattle Metro South		98144	
Seattle Metro South		Seattle Metro South	98178		
Zone #08	Tacoma Metro	98327	Zone #14	Greater Eastside	98004
	Tacoma Metro	98354		Greater Eastside	98005
	Tacoma Metro	98373		Greater Eastside	98006
	Tacoma Metro	98387		Greater Eastside	98007
	Tacoma Metro	98402		Greater Eastside	98008
	Tacoma Metro	98403		Greater Eastside	98025
	Tacoma Metro	98404		Greater Eastside	98027
	Tacoma Metro	98405		Greater Eastside	98029
	Tacoma Metro	98406		Greater Eastside	98033
	Tacoma Metro	98407		Greater Eastside	98034
	Tacoma Metro	98408		Greater Eastside	98039
	Tacoma Metro	98409		Greater Eastside	98050
	Tacoma Metro	98416		Greater Eastside	98052
	Tacoma Metro	98418		Greater Eastside	98053
	Tacoma Metro	98421	Greater Eastside	98074	
	Tacoma Metro	98422	Greater Eastside	98075	
	Tacoma Metro	98424	Zone #14A	Kent/Maple Valley	98030
	Tacoma Metro	98433		Kent/Maple Valley	98031
	Tacoma Metro	98439		Kent/Maple Valley	98032
	Tacoma Metro	98443		Kent/Maple Valley	98038
	Tacoma Metro	98447		Kent/Maple Valley	98042
	Tacoma Metro	98444	Zone #14B	Mercer Island	98040
	Tacoma Metro	98445		Zone #14C	Renton/Newcastle
Tacoma Metro	98446	Renton/Newcastle	98056		
Tacoma Metro	98447	Renton/Newcastle	98057		
Tacoma Metro	98465	Renton/Newcastle	98058		
Tacoma Metro	98466	Renton/Newcastle	98059		
Tacoma Metro	98467				
Tacoma Metro	98498				
Tacoma Metro	98499				

Puget Sound Energy Trade Ally Service Zones

Zone	City	Zip Code	Zone	City	Zip Code	
Zone #14D	Normandy Park-Sea Ta	98146	Zone #25	Skagit	98221	
	Normandy Park-Sea Ta	98148		Skagit	98232	
	Normandy Park-Sea Ta	98158		Skagit	98233	
	Normandy Park-Sea Ta	98166		Skagit	98235	
	Normandy Park-Sea Ta	98168		Skagit	98237	
	Normandy Park-Sea Ta	98188		Skagit	98238	
Zone #15	Snoqualmie/North Ben	98198	Skagit	98255		
	Snoqualmie/North Ben	98014	Skagit	98257		
	Snoqualmie/North Ben	98019	Skagit	98263		
	Snoqualmie/North Ben	98024	Skagit	98267		
	Snoqualmie/North Ben	98045	Skagit	98273		
Zone #16	Snoqualmie/North Ben	98065	Skagit	98274		
	Grotto/Skykomish	98224	Skagit	98283		
Zone #17	Grotto/Skykomish	98288	Skagit	98284		
	Northgate/Lake City	98115	Zone #26	Island	98236	
	Northgate/Lake City	98117		Island	98239	
	Northgate/Lake City	98125		Island	98249	
	Northgate/Lake City	98133		Island	98253	
	Northgate/Lake City	98155		Island	98260	
Northgate/Lake City	98177	Island		98277		
Zone #18	Bothell/Woodinville	98011	Zone #28	Kitsap County	98340	
	Bothell/Woodinville	98028		Kitsap County	98342	
	Bothell/Woodinville	98072		Kitsap County	98345	
	Bothell/Woodinville	98077		Kitsap County	98346	
Zone #19	Edmonds/Lynnwood	98012	Kitsap County	98364		
	Edmonds/Lynnwood	98020	Kitsap County	98370		
	Edmonds/Lynnwood	98021	Kitsap County	98392		
	Edmonds/Lynnwood	98026	Kitsap County	98383		
	Edmonds/Lynnwood	98036	Zone #28A	Kitsap County	98310	
	Edmonds/Lynnwood	98037		Kitsap County	98311	
	Edmonds/Lynnwood	98043		Kitsap County	98312	
	Edmonds/Lynnwood	98087		Kitsap County	98322	
Zone #20	Edmonds/Lynnwood	98275	Kitsap County	98337		
	Snohomish/Monroe	98205	Kitsap County	98353		
	Snohomish/Monroe	98258	Kitsap County	98359		
	Snohomish/Monroe	98272	Kitsap County	98366		
	Snohomish/Monroe	98290	Kitsap County	98367		
Zone #21	Snohomish/Monroe	98296	Kitsap County	98380		
	Gold Bar/Sultan	98251	Kitsap County	98386		
	Gold Bar/Sultan	98252	Kitsap County	98393		
Zone #22	Gold Bar/Sultan	98294	Zone #29	Kittitas	98926	
	Everett/Marysville	98201		Kittitas	98934	
	Everett/Marysville	98203		Kittitas	98946	
	Zone #23	Everett/Marysville	98204	Zone #29A	Upper Kittitas	98068
		Everett/Marysville	98208		Upper Kittitas	98922
		Everett/Marysville	98270		Upper Kittitas	98925
Everett/Marysville		98271	Upper Kittitas		98940	
Zone #24	Stanwood/Arlington	98223	Upper Kittitas	98941		
	Stanwood/Arlington	98282	Upper Kittitas	98943		
	Stanwood/Arlington	98292	Zone #30	Vashon Island	98013	
Zone #25	Whatcom	98220		Vashon Island	98070	
	Whatcom	98225	Zone #31	Bainbridge Island	98110	
	Whatcom	98226				
	Whatcom	98229				
	Whatcom	98230				
	Whatcom	98240				
	Whatcom	98244				
	Whatcom	98247				
	Whatcom	98248				
	Whatcom	98262				
	Whatcom	98264				
	Whatcom	98266				
	Whatcom	98276				
	Whatcom	98281				
	Whatcom	98295				

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Service Partner Purchase Agreement

This Service Partner Purchase Agreement (“**Agreement**”), dated as of _____, 200__ (“**Effective Date**”), is made by and between _____, a _____ corporation with offices at _____ (“_____” or “**Service Partner**”), and **Puget Sound Energy**, a Washington corporation with offices at 355 110th Ave NE, Bellevue, WA 98004 _____ (“**PSE**”).

Background

Service Partner is in the business of, and has expertise in, providing certain third party water heating and HVAC equipment, (collectively, “**Product**”) and Services, as hereinafter described and is registered as Tier 1 status in PSE’s Contractor Alliance Network (CAN); and

PSE is Washington State’s oldest local energy company serving millions of electric and natural gas customers across in 10 counties. A subsidiary of Puget Energy, PSE meets the energy needs of its customers, in part, through incremental, cost-effective energy efficiency, procurement of sustainable energy resources, and far-sighted investment in the energy-delivery infrastructure.

PSE is contracting for expert resources to assist in PSE’s new Leasing Program, specifically in the area of product installation and maintenance services for residential and commercial gas and electric water heaters and residential gas forced air furnaces and electric air-source heat pumps. PSE’s existing program includes residential and commercial gas water heaters and the new program is designed to incorporate providing those products as well as expanding to add electric water heaters and electric and gas heating products.

PSE and its Affiliates wish to obtain through Service Partner and Service Partner wishes to provide to PSE such Product and Services as hereinafter described pursuant to the term and conditions of this Agreement.

Agreement

In consideration of the mutual consideration, promises, representations, covenants and obligations set forth in this Agreement, the receipt and sufficiency of which are hereby acknowledged, the parties agree as follows:

This Agreement includes this signature page and Schedules, as listed below, and any Order Forms, Statements of Work, schedules, exhibits, amendments or addendums referencing this Agreement that are mutually executed by the parties at a later time.

- Schedule A - Definitions
- Schedule B –Performance Measurement
- Schedule C – PSE Path for customer Sourcing
- Schedule D – Hybrid Path for customer Sourcing
- Schedule E – Service Partner Path for customer Sourcing
- Schedule F – Maintenance and Repair
- Schedule G – Warranty Process
- Schedule H – General Terms and Conditions
- Schedule I - Fee Schedule
- Exhibit 1 – Water Heater Specifications
- Exhibit 2 – Residential HVAC Specifications
- Exhibit 3 – Water Heater Scope of Work

The parties hereby agree to comply with the terms and conditions set forth in this Agreement. This Agreement may be executed in counterparts and exchanged by facsimile or electronically scanned copy. Each such counterpart shall be deemed to be an original and all such counterparts together shall constitute one and the same Agreement. The authorized representatives of the parties have executed this Agreement by their signatures below:

Puget Sound Energy

[Enter Service Partner Legal Name]

By:

By:

Authorized Signature

Name:

Title: _____

Authorized Signature

Name:

Title:

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Schedule A - Definitions

1. Definitions. The following definitions shall apply for purposes of this Agreement:

- 1.1. **Agreement** shall mean the signature page of this Service Partner Purchase Agreement, Schedules attached to the signature page and any Order Forms, statements of work, schedules, exhibits, amendments or addendums referencing this Agreement that are mutually executed by the parties.
- 1.2. **Cost** means Service Partner's total cost of goods, including freight, handling fees and/or order fees that have been charged to Service Partner by the OEM or distributor providing the Product, and any third party fees associated with the transaction, such as credit card fees or other transaction fees charged to Service Partner. Service Partner does not initiate or add any self-imposed fees to the transaction.
- 1.3. **Deliverables** means those reports, documentation, and schedules to be developed and/or provided by Service Partner to PSE in tangible or electronic form.
- 1.4. **Destination Site** means the residence, facility or office or other location, as designated in this Agreement or the Order, for where the Product and/or Delivery is intended to finally reside and be put to use.
- 1.5. **Maintenance and Support Services** shall mean the OEM support and maintenance services ordered by the PSE from the Service Partner for the Product(s), service levels and response times specified on an Order.
- 1.6. **OEM** means the original equipment manufacturer for the Products to be ordered under this Agreement.
- 1.7. **Order or Order Form** means a Service Partner Order Form or quotation together with a confirming PSE Purchase Order.
- 1.8. **Order Portal** means a secure webportal of Service Partner through which PSE may request all information required in Service Partner Order Form(s) and submit PSE Purchase Order information to place an order.
- 1.9. **Product** means those items specified on an Order by OEM make and model numbers.
- 1.10. **Price** means the price specified in the Order for the Product.
- 1.11. **Service Partner Order Form** means the form of quotation, order form or other document used for the purpose of offering specific Product(s) and/or Deliverable(s) to PSE pursuant to this Agreement. Service Partner Order Form may be provided via on-line links or document scans.
- 1.12. **Services** means the reseller services provided by Service Partner under this Agreement; i.e. sourcing and fulfilling the Product and/or providing Deliverables identified in an Order.
- 1.13. **Warranty Documentation** means specific Warranty Documentation of the OEM for the Product ordered that grants PSE's Service Partners rights to process warranty claims. Warranty Documentation may be provided document scans.

Additional definitions may be contained elsewhere in this Agreement.

Schedule B –Performance Measurement

1. OEM Warranty Registration and Certification.

- 1.1. Service Partner agrees PSE may rely on Service Partner's expertise as an OEM representative to properly register the Product(s) with OEM in the full legal name of Puget Sound Energy and to provide PSE any and all documentation which OEM may require upon audit as proof of PSE's entitlement to the Product purchased and assign to PSE all warranties associated with the Product. Such proof of entitlement may be in the form of Certificates issued to PSE.
- 1.2. Upon request, Service Partner shall review and certify with the OEM the support information for Products purchased by PSE or its Affiliates under this Agreement or otherwise.

2. OEM Documentation. Service Partner shall forward to PSE all associated documentation provided or made available by the OEM at no additional cost, such as operator/user manuals, training materials, guides, and functional/technical specifications, whether in writing, electronic means or otherwise, (collectively "Documentation").

3. Service Level. The following Service Level Agreement has been jointly developed by Service Partner and Puget Sound Energy (PSE).

4. Program Description.

- 4.1. Puget Sound Energy's (PSE) Lease Solutions Service provides its customers with equipment and services for natural gas and electric water heaters, natural gas furnaces and electric air source heat pumps. PSE's customer pay Puget Sound Energy a monthly fee to lease this equipment as well as to cover repair and maintenance services per lease terms. The program is internally supported by a Fulfilment Manager, dedicated service representatives, inspectors, and other support staff. The program serves both commercial and residential customers. PSE has contracted with Service Partner to provide Services, including labor, permits, materials, equipment and all resources for the installation, repair, maintenance and removal of equipment under the lease program as requested from time to time by PSE's authorized representative(s).
- 4.2. PSE's Fulfilment Manager, or designee, shall serve as the primary contact for this Agreement. Unless otherwise designated in this contract or scope of work, Service Partner shall contact the Fulfilment Manager with any concerns or issues that arise.

5. Service Expectations.

- 5.1. Service Partner shall provide a high level of service at a competitive price while addressing an innovated approach over the life of this five year contract to provide equipment installation and removal services. Service Partner shall work closely with PSE's Lease Solutions Department.
- 5.2. Service provider shall be responsible for completing customer site inspections and or installations for all jobs accepted by provider within 48 hour period during normal business hours defined as 7 a.m. to 5 p.m. Monday through Saturday. No overtime or after hours shall be charged, unless approved by a PSE. No work shall be conducted on Sundays or holidays unless prior authorization is provided by PSE. Holidays are observed as: New Year's Day, Memorial Day, July 4th, Labor Day, Thanksgiving, and Christmas.
- 5.3. All jobs will be allocated based on product and zip code service agreements, and assigned based on partner acceptance. If partner accepts job, other partners will no longer be able to view or accept the same job
- 5.4. Service Partner will be responsible for ongoing repair and maintenance services for accepted jobs. PSE has right to put repair and maintenance work up for bid to all eligible PSE contractors if the original contractor is unable to perform.
- 5.5. All work shall be performed by trained, competent personnel, in the accordance with the best commercial and industry practices that meet manufacturer's standard.
- 5.6. Service Partner shall supply parts to support the installation and maintenance of equipment under PSE's leased program.
- 5.7. PSE requires identification stickers on all leased equipment. At the time of installation, Service Partner shall place an approved sticker supplied by PSE on the equipment if one is not already in place. This sticker identifies equipment as PSE's property. All parts utilized in conjunction with this agreement shall be new and shall meet original equipment manufacturers (OEM) specifications and shall restore the equipment so that it will perform to its original design specifications.
- 5.8. Precautions shall be exercised at all times for the protection of persons and property. Any fines levied for failure to comply with these requirements shall be borne solely by the responsible Service Partner.
- 5.9. Service Partner shall provide quality installation and workmanship keeping both PSE and PSE's customer from experiencing any health, legal or catastrophic event which might put PSE or their customer at risk.

- 5.10. In addition to all other warranties that may be supplied, Service Partner shall warrant its service against faulty labor and/or defective material for a period of 360 days from completion of work. This warranty requirement shall remain in force for the full warranty period.
 - 5.11. Equipment supplied by Service Partner shall be warranted by the OEM at the OEM standard warranty unless otherwise specified in Schedule G-Warranty Process. Service Partner shall process warranty claims per Schedule G-Warranty Process.
 - 5.12. Service Partner shall be responsible for providing PSE with a monthly report (the "Report") within ten (10) business days after the end of each calendar month detailing all installations, repairs, maintenance visits, disposals, warranties and code upgrades in the form required by PSE.
 - 5.13. Service Partner shall not charge PSE a wasted trip fee for any site visits that do not result in billable activities.
 - 5.14. Service Partner shall not charge PSE a fuel surcharge fee to recover increase in cost of fuel from the time agreement is executed
 - 5.15. Price increases shall be in full force and effective on anniversary date, as stipulated in Schedule I-Fee Schedule.
 - 5.16. Service Partner shall obtain all necessary permits required by local jurisdiction upon installation. Permit numbers shall be included on all invoices. Service Partner shall charge PSE the flat permit cost plus a \$20 fee.
 - 5.17. Permits shall be kept on record by Service Partner.
 - 5.18. PSE reserves the right to audit permit records at any time.
6. **Salvage/Disposal** Service Partner shall dispose of all residential and commercial equipment and parts removed under this Agreement in accordance with existing municipal, state and federal disposal standards. Service Partner shall not reuse or reinstall any equipment or parts removed during the course of work performed under this Contract. PSE reserves the right to request removed equipment and/or parts be returned to PSE as requested by the Fulfilment Manager.
7. **Account Management**
- 7.1. All questions and requests will be responded to in a professional and timely manner. Service Partner service goal is to be available during regular business hours Monday – Saturday, 7:00 AM to 5:00 PM Pacific Time. The Service Partner account team will provide responses to voicemails and emails within 30 minutes on normal business days.
 - 7.2. Every effort will be made to satisfy urgent requests and questions with an immediate response. These requests should go through the Service Partner Account team as listed below:
Account questions:
 - 7.3. Quarterly Business Review (QBR) – PSE and Service Partner shall agree to meet on a periodic, as needed basis to discuss the overall progress of the account and assess areas that may need improvement
2. **Account Management - Problem Resolution.**
- 2.1. PSE reserves the right to dispute any charges submitted for work performed under this Agreement. A program representative shall notify the approved Service Partner contact upon receipt of such dispute without penalty.
 - 2.2. Service Partner shall work with PSE to remedy any billing problems as soon as possible.
3. **Bill Statement Program**
- 3.1. Service Partner shall submit invoices to PSE electronically upon successful completion work. Invoice and payment requirements are further detailed in GC-2 Payments in PSE's General Conditions. Service Partner shall list all individual charges and related descriptions on each invoice, for both commercial and residential work. Service Partner shall also include water heater barcode sticker on all invoices. Charges and descriptions shall be congruent with pricing/descriptions on the approved lists, attached hereto. Any invoice(s) not in conformance with pricing as delineated in Schedule I-Fee Schedule shall not be processed until a mutual resolution is reached.
 - 3.2. Payment terms shall be Net 30, per invoice date receipt by PSE.
4. **Disaster Recovery Plan**
Service Partner shall enforce a comprehensive Business Continuity and Disaster Recovery Plan to fully support the Deliverables contained within this Agreement.
5. **Quarterly Audit/Business Review**
Service Partner will provide quarterly activity reports for the following areas:
- a. Overall number of installation
 - b. Number of code upgrades

- c. Itemized components utilized in upgrades
- d. PSE complaints
- e. Detail with corrective action

6. Cost Management Proposals (CMPs)

Service Partner is committed to helping PSE find efficient ways to improve process and reduce overall spend. As part of the overall service offering, Service Partner will actively make recommendations based on an in-depth understanding of PSE's business that is gained over time. These recommendations are referred to as Cost Management Proposals (CMPs). PSE must approve each CMP before it is implemented.

7. PSE Service

Service Partner will at all times maintain a high level of PSE service and satisfaction during the term of this Agreement. Without limiting the generality of the foregoing, Service Partner:

- a. will respond to PSEs within one (1) working day of an initial request and will keep appointments or contact PSEs not less than 24 hours in advance of an appointment to reschedule;
 - b. will clean up the work area to the same or better conditions after any installation or service, and will follow all state and local requirements to ensure proper recycling and/or disposal of debris or waste materials;
 - c. will provide same day customer contact to respond to PSEs relating to (as applicable) (i) the quality of any equipment sold, (ii) the quality of the installation service, (iii) the PSE's satisfaction with the services or with the equipment provided or (iv) scheduling repairs to the equipment installed by Service Partner that does not comply with the warranty set forth in Schedule G-Warranty Process. With respect to such repairs, Service Partner will use its best efforts to perform all repair work at the earliest opportunity during its normal work schedule (but in any event, no later than four (4) calendar days after contacted by PSE) and at no additional charge to the PSE. If a repair is necessary to provide PSE with hot water, heat, or if PSE's health or safety is impaired, Service Partner will perform the repair within 24 hours;
 - d. will immediately take all necessary safety precautions and appropriate actions to remedy any unsafe condition related to the equipment or worksite;
 - e. will not mislead PSEs or engage in any unfair or deceptive trade practice.
8. **Permitting.** Service Partner will secure all necessary permits for and comply with all applicable state, county and local laws, building codes and regulations with respect to or relating to any services provided or equipment installed.
9. **Warranty.** Service Partner will provide a one year parts and labor warranty, and warranties that all products used or installed by Service Partner will be free from defects in materials and workmanship under normal use and service. In addition, Service Partner will pass to PSEs all applicable manufacturer's warranties on any equipment.
10. **Job Equipment and Expenses.** Service Partner shall be solely responsible for procuring, paying for and maintaining any tools, equipment or supplies necessary or appropriate to provide Services in accordance with the Program requirements.

11. Inspections

PSE may, but shall have no obligation to, inspect and verify the work of the Service Partner and/or contact PSEs for the purpose of verifying Service Partner's compliance with the terms of this Agreement. PSE may conduct inspections on a random basis and with or without notice to Service Partner. Service Partners are required to cooperate with all PSE requested inspections. If any services or equipment provided by Service Partner do not meet Program specifications and requirements, as detailed in Exhibits 2 & 3, Service Partner must repair the installation and/or replace the equipment at its sole expense until it meets Program specifications within fifteen (15) days of notification of such non-compliance by PSE. If a repair is necessary to provide PSE with hot water, heat, or if PSE's health or safety is impaired, Service Partner will perform the repair within 24 hours. The making of (or failure or delay in making) any inspection by PSE shall not relieve Service Partner of responsibility for performance of its obligations under this Agreement.

12. Assignment and Subcontracting Prohibited

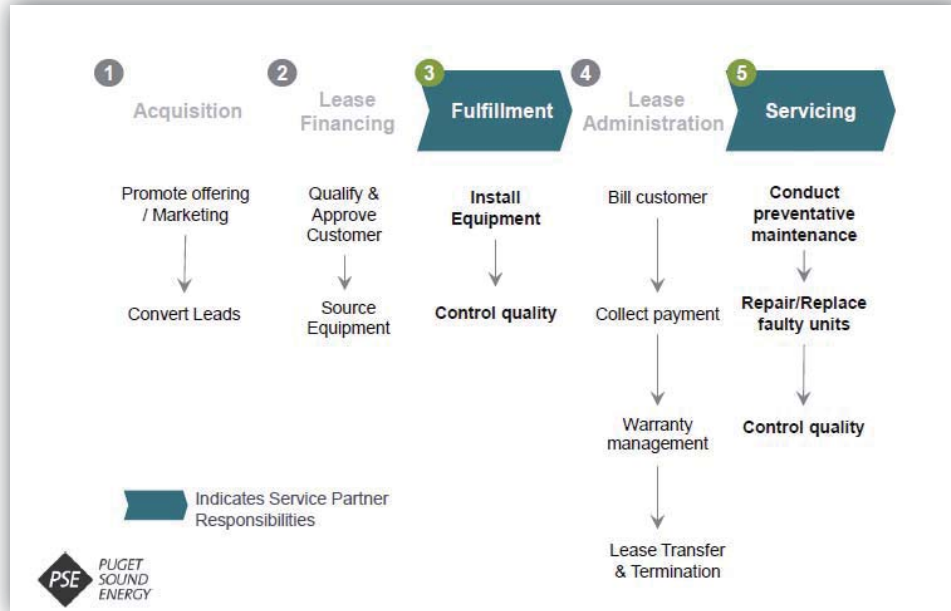
- 12.1. Service Partner shall not (by contract, operation of law or otherwise) delegate or subcontract performance of any of its obligations under this Agreement or any work it performs for any PSE without prior written notice to PSE.
- 12.2. Any such delegation or subcontracting without prior written notice to PSE shall constitute a material default of this Agreement.
- 12.3. No delegation or subcontracting of this Agreement, with or without PSE's consent, shall relieve Service Partner of its responsibility to perform its obligations under this Agreement.

- 12.4. Service Partner shall, at all times, be fully responsible for the performance, acts and omissions of Service Partner's employees, contractors, subcontractors and any other person who performs or furnishes any services to PSEs under the Program.
- 12.5. All such persons shall be fully experienced and properly qualified to perform the obligations of Service Partner under this Agreement.
13. **PSE or its Representative Owned Inventory.** Service Partner must adhere to the following requirements with respect to certain PSE owned inventory:
- 13.1. PSE or its representative holds in inventory certain products that may be installed by Service Partner at a PSE's site in connection with the Program. Upon mutual agreement by Service Partner and PSE, PSE or its representative may transfer certain inventory to Service Partner (the "Consigned Inventory"), to be used by Service Partner to perform installations in PSE homes.
- 13.2. Service Partner agrees to hold all Consigned Inventory as PSE's or its representative's property for the sole purpose of installing such inventory in a PSE's home as part of the Program as designed and agreed upon between PSE and said Service Partner. PSE or its representative shall at all times retain title to the Consigned Inventory.
- 13.3. All Consigned Inventory will be segregated and accounted for separately from Service Partner's other inventories, and Service Partner shall be responsible to PSE or its representative for any discrepancies in the amount of Consigned Inventory, or any loss or damage to the Consigned Inventory.
- 13.4. Service Partner shall maintain an insurance policy covering all Consigned Inventory at its full value and shall provide PSE, at its request, with proof of such insurance coverage. In case of loss relating to the Consigned Inventory, Service Partner shall remit to PSE or its representative the proceeds of such insurance, or if none, the price of any Consigned Inventory so damaged or lost.
- 13.5. Service Partner may be required, at the request of PSE, to include with Report required by Section 2 of this Agreement the following information: (i) the amount of all Consigned Inventory installed by Service Partner during the previous month; and (ii) the Consigned Inventory remaining in Service Partner's possession at the end of the previous month. PSE or its representative may, at any time during the Service Partner's usual business hours, proceed with an audit of the Consigned Inventory, and examine all accounting books concerning the Consigned Inventory.
- 13.6. PSE or its representative may, at its option, execute and file all such instruments, including Uniform Commercial Code financing statements, as may be necessary to confirm and to disclose PSE's or its representative's title to the Consigned Inventory, and Service Partner authorizes the same. Service Partner will inform its lenders, if any, that has a security interest in any of Service Partner's inventory or equipment that the Consigned Inventory is owned by PSE or its representative.

Schedule C – PSE Path for customer Sourcing

Overview:

PSE has designed the Lease Solutions program to be flexible to allow Service Partner optional methods for obtaining customer leads and sourcing equipment. This Schedule C describes the option for the initial contact by the customer directly with Puget Sound Energy. Below are the steps for this process.



1. Reporting, Invoicing, and Payment Terms

- 1.1. **Reporting.** Service Partner shall report on a monthly and quarterly basis per Schedule B-Performance Measurement , paragraph 3.2 for payment processing and Schedule H- General Terms and Conditions paragraph 12 for audit purposes.
- 1.2. **Payment Terms.** Subject to reconciliation with the terms of this Agreement *and the Order Form*, including verification that the Product was installed at the Destination Site, the invoice shall be paid (“paid” being defined as “issuance of payment from PSE’s Accounts Payable Department”) net 30 days after receipt of a **valid invoice at the above referenced remit-to address.**
- 1.3. **Disputed Invoices.** Any invoice or portion thereof that is subject to a good faith dispute will not be paid; in such case, PSE will promptly notify Service Partner of any rejected invoice or portion thereof, with reasons for such rejection. The rejected costs, adjusted to the extent as mutually agreed to, shall then be re-invoiced on a separate invoice
- 1.4. **Currency.** Invoices shall call for payments in currency set forth on Order Form, and shall accurately reflect the amount(s) of the Price set forth in the Order. Changes in the Price shall only be made in accordance with specific provisions for adjustments set forth in this Agreement.
- 1.5. **Price.** The Price to be paid by PSE to Service Partner for the Product shall be specified in the Order and shall represent PSE’s sole financial liability and obligation to Service Partner for the delivery of the Product and/or Deliverable. The Price shall consist of fees set forth in Schedule I – Fee Schedule.
- 1.6. **Tax.** PSE will pay any federal, state, and local sales, use, withholding tax, duties or similar taxes imposed or based on the sale of Products under this Agreement. Such taxes will be separately stated on Service Partner’s invoices and reported and paid to appropriate governmental authorities by Service Partner. At PSE’s request, Service Partner will file any certificate or other document which may cause any such tax to be avoided or reduced, and cooperate with PSE in contesting any such tax or in claiming, on PSE’s behalf, refunds of any such taxes paid by or on behalf of PSE.

Service Partner shall be solely responsible for the payment of all taxes that apply to Service Partner's operations, such as payroll or income taxes.

2. **Title, Risk of Loss, Returns**

2.1. **Title.** Service Partner shall transfer to PSE good and merchantable title to the Deliverables and Product, free from all liens, encumbrances and claims of others, upon delivery of the Deliverables and Product to Destination Site and its receipt by PSE, at which time title and risk of loss shall vest fully in PSE, unless notice of rejection is provided to Service Partner's authorized representative within five (5) business days of after such delivery.

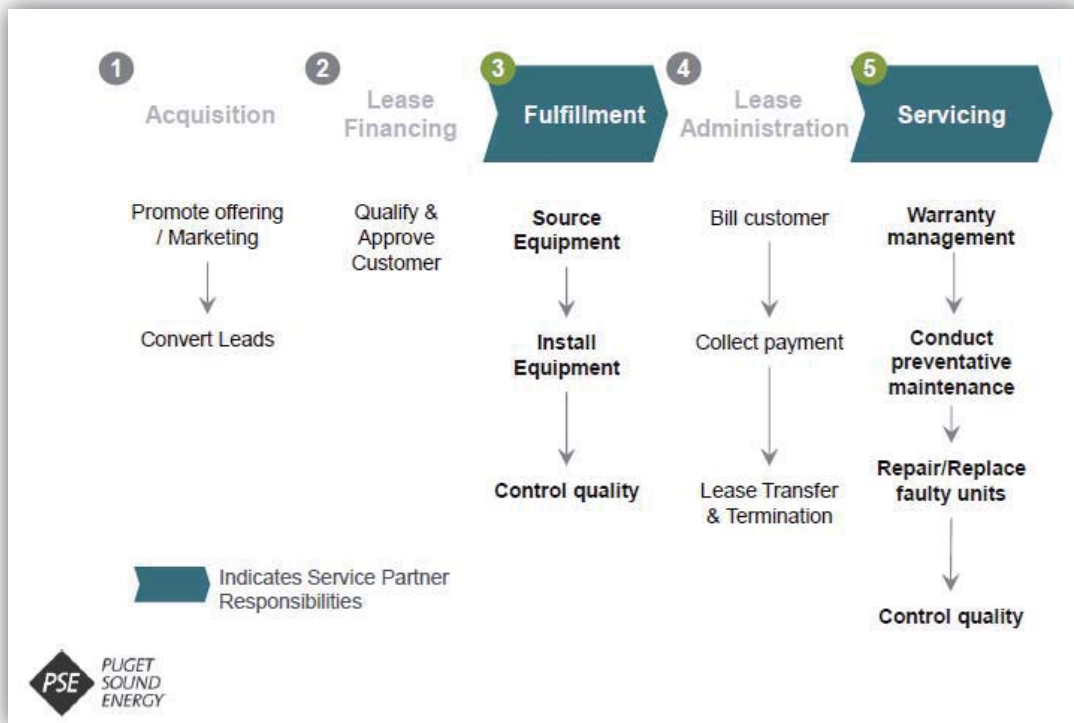
2.2. **Returns.** All returns shall be made in accordance with Schedule G, entitled Warranty Process.

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Schedule D – Hybrid Path for customer Sourcing

Overview:

PSE has designed the Lease Solutions program to be flexible to allow Service Partner optional methods for obtaining customer leads and sourcing equipment. This Schedule D describes the option for the initial contact by the customer through PSE, which will be posted for Service Partner the opportunity to fulfill the customer order. The Service Partner will respond to the customer and then provide specified products for PSE. Below are the steps for this process.



1. Reporting, Invoicing, and Payment Terms

- 1.1. **Reporting.** Service Partner shall report on a monthly and quarterly basis per Schedule B-Performance Measurement , paragraph 3.2 for payment processing and Schedule H- General Terms and Conditions paragraph 12 for audit purposes.
- 1.2. **Payment Terms.** Subject to reconciliation with the terms of this Agreement and the Order Form, including verification that the Product was delivered to Destination Site, the invoice shall be paid (“paid” being defined as “issuance of payment from PSE’s Accounts Payable Department”) net 30 days after receipt of a **valid invoice at the above referenced remit-to address**.
- 1.3. **Disputed Invoices.** Any invoice or portion thereof that is subject to a good faith dispute will not be paid; in such case, PSE will promptly notify Service Partner of any rejected invoice or portion thereof, with reasons for such rejection. The rejected costs, adjusted to the extent as mutually agreed to, shall then be re-invoiced on a separate invoice
- 1.4. **Currency.** Invoices shall call for payments in currency set forth on Order Form, and shall accurately reflect the amount(s) of the Price set forth in the Order. Changes in the Price shall only be made in accordance with specific provisions for adjustments set forth in this Agreement.

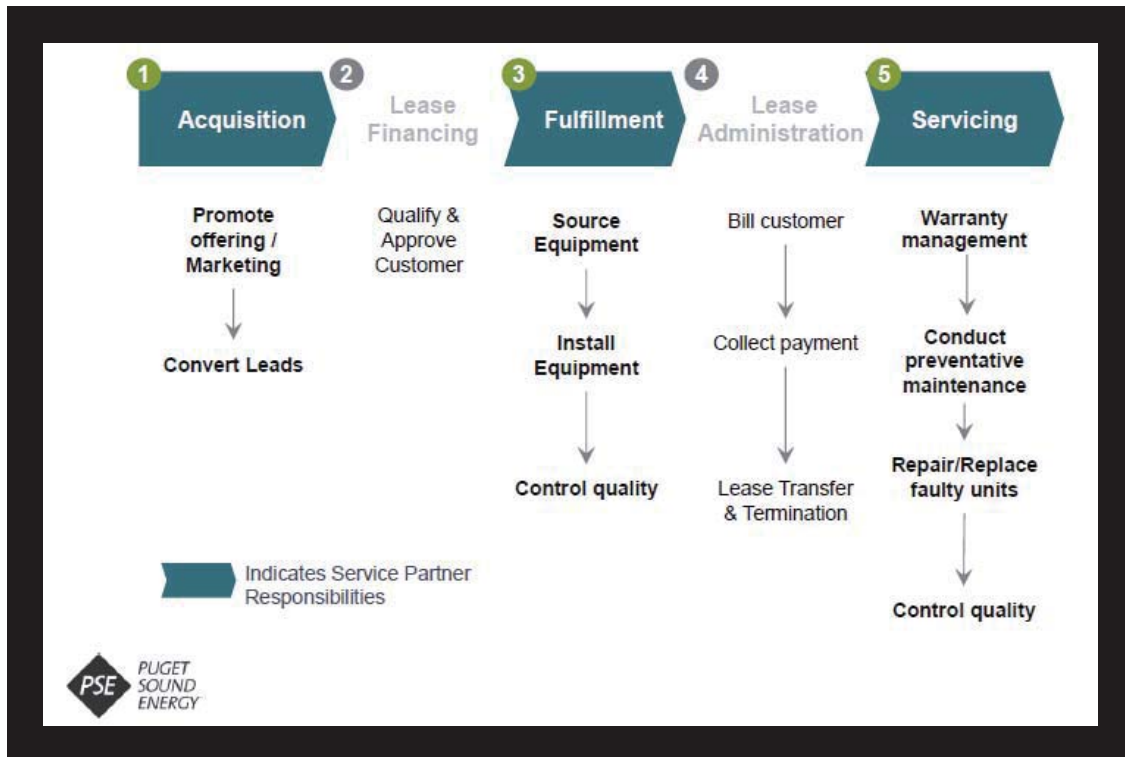
- 1.5. **Price.** The Price to be paid by PSE to Service Partner for the Product shall be specified in the Order and shall represent PSE's sole financial liability and obligation to Service Partner for the delivery of the Product and/or Deliverable. The Price shall consist of fees set forth in Schedule I – Fee Schedule.
 - 1.6. **Tax.** PSE will pay any federal, state, and local sales, use, withholding tax, duties or similar taxes imposed or based on the sale of Products under this Agreement. Such taxes will be separately stated on Service Partner's invoices and reported and paid to appropriate governmental authorities by Service Partner. At PSE's request, Service Partner will file any certificate or other document which may cause any such tax to be avoided or reduced, and cooperate with PSE in contesting any such tax or in claiming, on PSE's behalf, refunds of any such taxes paid by or on behalf of PSE. Service Partner shall be solely responsible for the payment of all taxes that apply to Service Partner's operations, such as payroll or income taxes.
2. **Title, Risk of Loss, Returns**
- 2.1. **Title.** Service Partner shall transfer to PSE good and merchantable title to the Deliverables and Product, free from all liens, encumbrances and claims of others, upon delivery of the Deliverables and Product to Destination Site and its receipt by PSE, at which time title and risk of loss shall vest fully in PSE, unless notice of rejection is provided to Service Partner's authorized representative within five (5) business days of after such delivery.
 - 2.2. **Returns.** All returns shall be made in accordance with Schedule G, entitled Warranty Process.

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Schedule E – Service Partner Path for customer Sourcing

Overview:

PSE has designed the Lease Solutions program to be flexible to allow Service Partner optional methods for obtaining customer leads and sourcing equipment. This Schedule E describes the option for the initial contact by the customer through Service Provider. Below are the steps for this process.



1. Reporting, Invoicing, and Payment Terms

- 1.1. **Reporting.** Service Partner shall report on a monthly and quarterly basis per Schedule B-Performance Measurement , paragraph 3.2 for payment processing and Schedule H- General Terms and Conditions paragraph 12 for audit purposes.
- 1.2. **Payment Terms.** Subject to reconciliation with the terms of this Agreement and the Order Form, including verification that the Product was delivered to Destination Site, the invoice shall be paid (“paid” being defined as “issuance of payment from PSE’s Accounts Payable Department”) net 30 days after receipt of a **valid invoice at the above referenced remit-to address**.
- 1.3. **Disputed Invoices.** Any invoice or portion thereof that is subject to a good faith dispute will not be paid; in such case, PSE will promptly notify Service Partner of any rejected invoice or portion thereof, with reasons for such rejection. The rejected costs, adjusted to the extent as mutually agreed to, shall then be re-invoiced on a separate invoice
- 1.4. **Currency.** Invoices shall call for payments in currency set forth on Order Form, and shall accurately reflect the amount(s) of the Price set forth in the Order. Changes in the Price shall only be made in accordance with specific provisions for adjustments set forth in this Agreement.
- 1.5. **Price.** The Price to be paid by PSE to Service Partner for the Product shall be specified in the Order and shall represent PSE's sole financial liability and obligation to Service Partner for the delivery of the Product and/or Deliverable. The Price shall consist of fees set forth in Schedule I – Fee Schedule.
- 1.6. **Tax.** PSE will pay any federal, state, and local sales, use, withholding tax, duties or similar taxes imposed or based on the sale of Products under this Agreement. Such taxes will be separately stated on Service Partner's invoices and

reported and paid to appropriate governmental authorities by Service Partner. At PSE's request, Service Partner will file any certificate or other document which may cause any such tax to be avoided or reduced, and cooperate with PSE in contesting any such tax or in claiming, on PSE's behalf, refunds of any such taxes paid by or on behalf of PSE. Service Partner shall be solely responsible for the payment of all taxes that apply to Service Partner's operations, such as payroll or income taxes.

2. **Title, Risk of Loss, Returns**

2.1. **Title.** Service Partner shall transfer to PSE good and merchantable title to the Deliverables and Product, free from all liens, encumbrances and claims of others, upon delivery of the Deliverables and Product to Destination Site and its receipt by PSE, at which time title and risk of loss shall vest fully in PSE, unless notice of rejection is provided to Service Partner's authorized representative within five (5) business days of after such delivery.

2.2. **Returns.** All returns shall be made in accordance with Schedule G, entitled Warranty Process.

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Schedule F – Maintenance and Repair

1. **Initial Contact Water Heater Maintenance and/or Repair.**
 - 1.1. **Contractor Schedules Maintenance with Customer**
 - 1.1.1. Contractor conducts scheduled standard maintenance
 - 1.1.1.1. Standard Scope of Work is included in pricing sheets
 - 1.1.2. Contractor notes and reports to PSE the need for repairs above maintenance scope
 - 1.1.2.1. PSE approves repairs
 - 1.1.2.2. PSE provides work notification for repairs
 - 1.1.2.3. Contractor coordinates with PSE Customer to perform repairs.
 - 1.1.3. Service Partner has right of refusal
 - 1.1.3.1. PSE posts to website for backup repair contractor
 - 1.1.3.2. Backup Contractor selects job
2. **Reporting, Invoicing, and Payment Terms**

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Schedule G – Warranty Process
[[[under development]]]

1. Water Heater
2. HVAC

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Schedule H – General Terms and Conditions

1. Term, Termination

- 1.1. **Term of Agreement.** This Agreement will commence on the Effective Date and will continue until the earlier of: (i) three (3) years, or ii) when one party notifies the other party of its intent to terminate by providing the other party with ninety (90) days prior written notice of such intent.
- 1.2. **Term of Order Forms.** Except for Termination for Default, if the term of an Order Form extends beyond the expiration of this Agreement, this Agreement shall be deemed to have been automatically extended for purposes of such Order Form(s) only through the remaining then-current term of the Order Form.
- 1.3. **Termination for Default.** Either party may terminate this Agreement in whole or in part by giving the defaulting party a written "Notice of Termination for Default", specifying one or more of the following causes or circumstances and the party in default does not cure such failure within ten (10) calendar days (or such longer period as the non defaulting party may authorize in writing) after receipt of notice from the non defaulting party specifying such failure:
 - a. if a party becomes insolvent or makes a general assignment for the benefit of creditors; or
 - b. if a petition under the Bankruptcy Code is filed by or against a party; or
 - c. if material and adverse developments affecting a party's business come to the attention of the non defaulting party, and it seeks but fails to receive from the party in default reasonable assurances, in writing, as to its ability and intention to perform and complete its obligations under this Agreement; or
 - d. if a party becomes involved in legal proceedings that in the non defaulting party's reasonable opinion materially interferes or will materially interfere with the non defaulting party's obligations under this Agreement; or
 - e. if the defaulting party fails to perform any of the other material provisions of this Agreement.
- 1.4. **Order Cancellation.** An Order may be cancelled follows:
 - 1.4.1. PSE shall have the right to cancel or postpone, in whole or in part, any Order, without penalty, provided that notice of such cancellation or postponement is received by Service Partner prior to shipment of the ordered Products.
 - 1.4.2. If PSE cancels an Order following shipment of the Products but prior to delivery, PSE shall pay all freight and handling charges for shipment and return shipment of such Products to Service Partner. All returns shall be made in accordance with Service Partner Return Policy.
 - 1.4.3. Notwithstanding the foregoing, any such cancellations shall be subject to restocking charges, if any, imposed by the OEM associated with the return of Product.
- 1.5. **Other Remedies.** The parties' rights and remedies set forth in this Section are not exclusive, and are in addition to any other rights and remedies provided at law, in equity, or under this Agreement.

2. Confidential Information.

- 2.1. PSE exclusively owns all PSE Confidential and PSE Information. "PSE Confidential and PSE Information" includes: any trade secrets or other confidential or proprietary information of PSE, whether of a technical, business or other nature, and any information about any PSE PSE that Service Partner obtains from PSE or any other source in connection with the Program, and which may include (without limitation), PSE names, addresses, account information, usage data, credit information, demographic information and similar. Service Partner shall keep all such information confidential, and protect all PSE Confidential and PSE Information from disclosure using the highest practical degree of care. Service Partner may not disclose PSE Confidential and PSE Information to third parties, or use PSE Confidential and PSE Information for any purpose other than to perform services pursuant to the terms of this Agreement. A breach of this Section by an employee or agent of Service Partner will be deemed a breach by Service Partner, and Service Partner agrees, at its sole expense, to take all reasonable measures (including but not limited to court proceedings) to restrain its employees or agents from prohibited or unauthorized disclosure of the PSE Confidential and PSE Information. Service Partner shall immediately notify PSE of any actual, probable or reasonably suspected disclosure or unauthorized access to the PSE Confidential and PSE Information. This section shall survive termination of this Agreement.
- 2.2. **Exclusions.** This confidentiality undertaking shall not apply to any part of the proprietary and/or Confidential Information of which the recipient party can prove that: (i) it was known to it prior to being furnished to the recipient party hereunder (as evidenced by written record predating such disclosure); (ii) it is, or becomes public knowledge through no fault or breach of the terms of this Agreement by the recipient party; (iii) is received by the recipient party from a third party in good faith and not in breach of any agreement; or (iv) is independently acquired by the recipient party as a result of work carried out by an employee of the recipient party to whom no disclosure of this proprietary and/or Confidential Information has been made.

2.3. **Return of Confidential Information.** Upon expiration or termination of this Agreement, each party will cease all use of the other party's Confidential Information and will promptly return, or at the other party's request, destroy all proprietary or Confidential Information in tangible form and all copies of Confidential Information. Upon request, the Receiving Party will certify in writing its compliance with the foregoing.

3. **Representations and Warranties.**

3.1. Service Partner hereby represents and warrants to PSE that for the term of this Agreement:

3.1.1. Service Partner shall perform the Services in a timely manner and with a high degree of professional skill and care using customarily accepted good and sound professional practices and procedures in the industry.

3.1.2. Service Partner will maintain all necessary local, state, and federal licenses and certifications that may be required in order to legally deliver the Product and Deliverables described in the Order(s). Service Partner understands and acknowledges that Service Partner is wholly responsible for ensuring compliance with all federal, state, and local laws associated with the delivery of all Services associated with this Agreement and associated SOW(s) and Order(s).

3.1.3. Service Partner has all rights, approvals, and/or authorizations necessary to perform the Services hereunder, and provide the Product and/or Deliverables.

3.1.4. Service Partner is authorized to execute this Agreement, is qualified to perform the Services, and has good title to the materials, supplies and equipment constituting the Services, free from all liens, encumbrances and claims of others.

3.2. **Remedy.** If a defect occurs or appears in the Deliverables or Services provided hereunder, it shall be presumed that Service Partner failed to meet such standards, and Service Partner shall promptly and at its own expense, correct or re-perform any such Services which fail to meet such standards within a reasonable time frame acceptable to PSE at no additional cost.

3.3. **Warranty of OEM Product.** Service Partner is a reseller of Product, not the OEM, and therefore disclaims any warranty responsibility regarding Product provided under this Agreement. Service Partner's sole responsibility shall be to forward the appropriate End User Agreements regarding such Product to PSE for review prior to Order placement and, to the extent granted by the OEM, PSE shall be the beneficiary of the OEM's warranties with respect to the Product. Service Partner is not a party to any such terms between PSE and OEM and, provided Service Partner has fulfilled its obligations to provide all applicable documentation and proper OEM Product Registration as set forth in Schedule B, Section 5, PSE agrees to look solely to the OEM for satisfaction of any and all warranty claims related to that OEM's Product and PSE shall be deemed to have made its own selection of the Products to be ordered hereunder

4. **Indemnification, Insurance and Limitation of Liability.**

4.1. **Service Partner General Indemnity.** Service Partner (a) hereby indemnifies, saves and holds harmless each PSE Indemnitee from all settlements, damages, expenses (including attorneys' fees) and costs arising out of a third party claim based on Service Partner's breach of this Agreement or its reseller agreements with an OEM or any failure by Service Partner to comply with applicable laws and regulations; and (b) without limitation as to amount, anything to the contrary in this Agreement notwithstanding, Service Partner hereby agrees to fully indemnify each PSE Indemnitee and assume the defense of and save and hold each PSE Indemnitee harmless from any and all liability, claims, demands, damages and costs of every kind and nature for personal injury to or death of any and all persons, including, without limitation, employees or agents of each PSE Indemnitee to the extent caused by the negligence or misconduct of Service Partner.

4.2. **PSE General Indemnity.** PSE (a) hereby agrees to indemnify, save and hold harmless each Service Partner Indemnitee from all settlements, damages, expenses (including attorneys' fees) and costs arising out of a third party claim based on PSE's breach of this Agreement or any failure by PSE to comply with applicable laws and regulations; and (b) without limitation as to amount, anything to the contrary in this Agreement notwithstanding, PSE hereby agrees to fully indemnify each Partner Indemnitee and assume the defense of and save and hold each Partner Indemnitee harmless from any and all liability, claims, demands, damages and costs of every kind and nature for personal injury to or death of any and all persons, including, without limitation, employees or agents of each Partner Indemnitee to the extent caused by the negligence or misconduct of PSE.

4.3. **Defense and Settlement Procedure.** Upon either party's receipt of notice of a claim with respect to which the other party has the obligation to defend, the defending party shall be entitled to have, and shall promptly take, sole control over the defense and settlement of such claim with counsel selected by the defending party, provided, however, that (i)

the Indemnitee shall be entitled to participate in the defense of such claim and to employ counsel at its own expense to assist in the handling of such claim, and (ii) no settlement or compromise that imposes any liability or obligation on the Indemnitee shall be made without the prior written consent of the Indemnitee, and (iii) The Indemnitee shall cooperate to the extent reasonably requested by the defending party in writing in the defense.

- 4.4. **Cooperation.** The indemnified party shall have the right, at its sole discretion, on its own behalf, to participate in such defense to whatever extent it deems necessary to protect its own interest and shall cooperate fully with the indemnifying party in any such participation. The indemnified party shall notify the other of all claims, demands, suits, actions and proceedings for which the indemnifying party has, or potentially has, indemnification responsibility under this Agreement, and shall furnish the indemnifying party all information, authority and assistance needed to enable it to defend the same. The indemnifying party's defense shall be through counsel selected by it.
- 4.5. **OEM Product Indemnification.** Service Partner is a reseller of Product, not the OEM or licensor, and therefore disclaims any indemnification responsibility regarding Product provided under this Agreement. Service Partner's sole responsibility shall be to forward the appropriate Warranty Documentation regarding such Product to PSE for review prior to Order billing and PSE shall be the beneficiary of the OEM's indemnifications with respect to the Product. Service Partner is not a party to any such terms between PSE and OEM and provided all necessary Warranty Documentation are delivered to PSE by Service Partner, PSE agrees to look solely to the OEM for satisfaction of any and all indemnification claims related to that OEM's Product.
- 4.6. **LIMITATION OF LIABILITY.** EXCEPT WITH REGARD TO CLAIMS INDEMNIFIABLE UNDER SECTIONS 4.1 AND 4.2 AND BREACH OF CONFIDENTIALITY OBLIGATIONS IN THIS SCHEDULE H, (1) NEITHER PARTY SHALL BE LIABLE TO THE OTHER PARTY FOR ANY INDIRECT, INCIDENTAL, SPECIAL, PUNITIVE, EXEMPLARY OR CONSEQUENTIAL DAMAGES ARISING IN CONNECTION WITH THIS AGREEMENT, WHETHER IN AN ACTION IN CONTRACT, TORT, STRICT LIABILITY OR NEGLIGENCE, OR OTHER ACTIONS, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGES, AND (2) NEITHER PARTY'S PER OCCURRENCE LIABILITY TO THE OTHER PARTY SHALL EXCEED THE TOTAL AMOUNT OF FEES ACTUALLY PAID OR PAYABLE BY CUSTOMER TO SERVICE PARTNER UNDER THIS AGREEMENT FOR THE YEAR PREVIOUS TO THE INCIDENT WHICH GAVE CAUSE FOR SUCH LIABILITY. CUSTOMER ACKNOWLEDGES THAT SUCH AMOUNT REFLECTS THE ALLOCATION OF RISK SET FORTH IN THIS AGREEMENT AND THAT SERVICE PARTNER WOULD NOT ENTER INTO THIS AGREEMENT WITHOUT THESE LIMITATIONS ON ITS LIABILITY.
- 4.7. **Insurance.** Throughout the term of this Agreement, Service Partner shall at its own expense, obtain and maintain the following insurance: (i) Commercial General Liability, with coverage of not less than \$1,000,000 per occurrence and \$2,000,000 in the aggregate for bodily injury and property damage; (ii) Motor Vehicle Liability insurance for owned, non-owned and hired vehicles, with limits of not less than \$1,000,000 combined single limit for bodily injury and property damage; (iii) Workers' Compensation insurance in the amount required by statute for all states in which the project or work is to be performed; and (iv) Professional Errors and Omissions Liability Insurance with limits of not less than \$1,000,000 per claim. All policies required by this Agreement shall be written by insurance carriers licensed to do business in the state in which the service is performed. The insurance afforded to PSE hereunder shall be primary for all purposes and without any right of contribution from any insurance carried by PSE. Service Partner will notify PSE in writing of any material change to its coverage as described herein. Service Partner shall furnish certificates of insurance evidencing coverage or other acceptable evidence of self-insurance to PSE upon request.
5. **Record-Keeping and Audit Rights.**
- 5.1. During the term of this Agreement and for three (3) years thereafter, Service Partner shall maintain adequate books and records relating to each item of information provided in Reports or submitted to PSE in relation to the Program.
- 5.2. Upon thirty (30) days advance notice to Service Partner, PSE or its representatives may audit the applicable records and facilities of Service Partner to verify its compliance with the terms of this Agreement. Service Partner shall provide PSE's designated audit or inspection team access to the relevant records and Service Partner's facilities.
- 5.3. Such audit by PSE may occur no more than twice in any given calendar year, and any audit will be conducted during Service Partner's normal business hours.
- 5.4. Service Partner shall promptly correct any errors and omissions disclosed by such audit, and Service Partner shall pay PSE the full amount of any overpayment revealed by the audit plus interest at the rate of one percent (1%) per month or the maximum rate permitted by applicable law from the date such payments were due under the terms of this Agreement.

- 5.5. Notwithstanding the foregoing, if such audit reveals an overpayment by Service Partner of more than five percent (5%) for the period covered by the audit report, Service Partner shall also pay all of the fees and costs associated with such audit. PSE, in its sole discretion, may terminate this Agreement immediately should any audit disclose that Service Partner has underreported the number and/or price of sales and/or installations during the audit period.
6. **Relationship of the Parties; Independent Service Partner.** Service Partner and PSE are independent contractors. Neither party has the authority to bind or make any commitment on behalf of the other party. None of either party's employees are entitled to any employment rights or benefits of the other party.
7. **Assignment and Subcontracting.**
- 7.1. Neither party may assign, subcontract, or transfer the Agreement or any part thereof without the other party's prior written consent, and any such assignment or transfer without such consent shall be null and void. However, either party will have the right to assign this Agreement and its rights and obligations under it, in whole or in part, to any present or future Affiliate or to any entity which acquires from it the operating assets to fulfill its obligations under this Agreement.
- 7.2. Notwithstanding PSE's written consent to a proposed subcontract, Service Partner shall remain responsible for all subcontracted Product and the payment therefor, and Service Partner shall be fully liable to PSE for the acts and omissions of any subcontracted entity, their agents, representatives and persons directly or indirectly employed by them as Service Partner is for the acts and omissions of Service Partner's own employees.
- 7.3. This Agreement shall be binding upon and inure to the benefit of the parties and their respective successors and assigns permitted by this Agreement.
8. **Publicity.** During or after the term of this Agreement, the parties shall not release any information (other than to its subcontractors on a need to know basis), including news releases, publicity, promotional, marketing, or other materials, media, or activities, any name, trade name, trademark, service mark, logo, or any other designation relating to the other party to this Agreement, its Affiliates, or this Agreement, without the other party's prior written approval and compliance with any terms and conditions related to such use which the owner of the mark provides to the other party. Except as specifically set out in this Agreement, nothing in this Agreement shall grant, suggest or imply any authority for one party to use the name, trademarks, service marks or trade names of the other for any purpose whatsoever.
9. **Remedies.** Unless expressly stated otherwise herein, all rights and remedies of the parties are separate and cumulative, and no one of them, whether exercised or not, shall be deemed to exclude, limit or prejudice any other rights or remedies which the parties may have.
10. **Choice of Law and Arbitration.** This contract shall be interpreted and construed in accordance with the laws of the State of Washington without regard to its conflict of laws provisions. Service Partner shall not commence or prosecute any suit, proceeding or claim to enforce the provisions of this Agreement, to recover damages for breach or default under this Agreement, or otherwise arising under or by reason of this Agreement, other than in the state and federal courts sitting in King County, Washington. Service Partner hereby irrevocably consents to the jurisdiction of the courts of the State of Washington with venue laid in King County, and of the U.S. District Court for the Western Division District of Washington in Seattle, Washington.
11. **Waiver.** The parties shall not be deemed to waive any of their rights or remedies under this Agreement unless such waiver is in writing and signed by the party to be bound. No delay or omission on the part of either party in exercising any right or remedy shall operate as a waiver of such right or remedy or any other right or remedy. A waiver of any right or remedy on any one occasion shall not be construed as a bar to or waiver of such right or remedy or any other right or remedy on any future occasion.
12. **Headings.** The headings used in this Agreement are for convenience only and shall not be used to interpret this Agreement.
13. **No Third Party Beneficiaries.** No provisions of this Agreement are intended or shall be construed to confer upon or give to any person or entity other than Service Partner and PSE (and any of their permitted assignees hereunder) any rights, remedies or other benefits under or by reason of this Agreement.

14. **Entire Agreement.** This Agreement, when executed, and the documents referenced herein encompass the entire Agreement between PSE and Service Partner with respect to the subject matter hereof and supersede all prior representations, agreements and understandings, written or oral. This Agreement may not be altered, amended or modified except by written instrument signed by the duly authorized representatives of both parties. In the event of any conflict or inconsistency between this Agreement and any schedules or exhibits hereto, the terms of this Agreement shall prevail.
15. **Invalidity.** If any provision, or portion thereof, of this Agreement is or becomes invalid under any applicable statute or rule of law, it is to be deemed stricken and the rest of the Agreement shall remain in full force and effect.
16. **Laws, Regulations and Permit.** Service Partner shall at all times comply with all applicable federal, state and local laws, ordinances, statutes, rules or regulations including but not limited to those relating to wages, taxes, hours, environmental, fair employment practices, equal opportunity, antidiscrimination, safety, fire prevention and working conditions.
17. **Force Majeure.** Notwithstanding anything else in this Agreement, and except for the obligation to pay money, no default, delay or failure to perform on the part of either party will be considered a breach of this Agreement if such default, delay or failure to perform is shown to be due to riots, civil disturbances, epidemics, war, terrorism, severe weather, fire, earthquakes, acts of God or the public enemy, or nuclear disasters. The party experiencing the delay shall be prompt in restoring normal conditions, establishing new schedules and resuming operations as soon as the event causing the failure or delay has ceased. Service Partner shall notify PSE promptly of any such delay and shall specify the effect on the Product as soon as practical.
18. **Survival.** Each provision of this Agreement reasonably intended by its terms to survive termination or expiration of this Agreement shall so survive.
19. **Orders.** The terms and conditions appearing on any Service Partner Order Form or PSE Purchase Order or clickthrough terms issued by PSE or Service Partner for this Agreement, if any, shall not change, add to, or modify the terms or conditions of the parties' agreement, as reflected in this Agreement, in any way.

Schedule I - Fee Schedule

[Under development. Product fees and consulting fees to be provided by Service Partner.]

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Exhibit 1 – Water Heater Specifications

Under development.. Reference pricing Sheet.

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Exhibit 2 – Residential HVAC Specifications

Under development.. Reference pricing Sheet.

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Exhibit 3 – Water Heater Scope of Work

TBD. Reference pricing Sheet.

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From: [REDACTED]
Sent: Thursday, February 04, 2016 3:27 PM
To: LeaseBid -- mail --
Subject: Information for Partner Pathway
Attachments: Partner_Path_Bid_Sheet_Lease_Solutions_RFP.xlsx; [REDACTED] - PSE.pdf

Hello,

Attached is all the information, please free contact me if you need any additional information.

Thank You,

[REDACTED]

BID SHEET INSTRUCTIONS

- * There are six tabs included in this bid sheet, each representing a separate product category.
- * Each tab includes details outlining what should and should not be included in each pricing category
- * All pricing should be entered as a flat rate, absent of taxes, unless noted otherwise
- * All input cells, defined below, must be completed for each product a proposer is submitting to manage

Input cells

Orange Cells - only these input cells should be edited

Application	Category	Type	Fuel	Capacity (cfm/hr)	AFUE Efficiency (%)	Blower Motor	Combustion Stages	Product Certification	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standards/References - Energy Efficiency (Flat Rate)	Repair & Service (Hourly Labor Rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	HVAC	Forced Air Furnace	Gas	40	> 80	High Efficiency	Single									
Residential	HVAC	Forced Air Furnace	Gas	60	> 80	High Efficiency	Single									
Residential	HVAC	Forced Air Furnace	Gas	40	> 80	High Efficiency	Two									
Residential	HVAC	Forced Air Furnace	Gas	60	> 80	High Efficiency	Two									
Residential	HVAC	Forced Air Furnace	Gas	40	≥ 95	High Efficiency	Single	AHRI or ENERGY STAR Certified								
Residential	HVAC	Forced Air Furnace	Gas	60	≥ 95	High Efficiency	Single	AHRI or ENERGY STAR Certified								
Residential	HVAC	Forced Air Furnace	Gas	40	≥ 95	High Efficiency	Two	AHRI or ENERGY STAR Certified								
Residential	HVAC	Forced Air Furnace	Gas	60	≥ 95	High Efficiency	Two	AHRI or ENERGY STAR Certified								

Costs Category	Cost Component	What should be included in flat rate?	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> 1. Conduct customer outreach activities. 2. Identify potential customers and conduct eligibility assessment 3. Coordinate customer qualification and approval process with PSE 4. Secure customer signature on PSE form(s) 	N/A
	Site Check	<ol style="list-style-type: none"> 1. Perform heat loss & Manual calculations 2. Take material measurement 3. Verify installation will meet code (venting combustion air gas pipe clearances etc.) 4. Work order for installation 5. Schedule installation 6. Secure customer signature on PSE form(s) as appropriate 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time -- where applicable 	N/A
STANDARD INSTALLATION	Standard Installation	<ol style="list-style-type: none"> 1. Conduct duct blaster 2. Shut off power 3. Shut off gas line and disconnect 4. Disconnect 115 v and 24 V wiring 5. Remove and dispose of old furnace 6. Remove old furnace 7. Cut sheet metal to transition points 8. Install furnace 9. Install new sheet metal filter channel and standard filtration system 10. Seal internal and external joints 11. Install and/or reconnect venting 12. Hook up inspect and test fuel line 13. Hook up inspect and test gas line 14. Install fan switch or connect to t-stat 15. Hook up internal 24 v controls and t-stat 16. Fire off unit check combustion and firing rate 17. Set fan speed check all controls run through heating cycle 18. Check all safety operations 19. Check for gas leaks 20. Review t-stat settings with customer to optimize their goals/system performance 21. Discuss installation and operation with homeowner 	<ol style="list-style-type: none"> 1. Craw space or attic installation 2. Relocation of furnace 3. Relocating gas line 4. Repainting venting cover 5. Relocating return vents 6. Increasing duct size 7. Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o PVC/Condensate/ Condensate pump o Increasing gas line size per code o Increasing venting size per code 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. T-stat relocation or rewiring installs 11. Installing new or smart t-stat 12. Advanced air filtration system 13. Controls add-ons (temperature/humidity sensor) 14. Relocating gas line 15. Relocating return vents 16. Whole house duct sealing 17. Air conditioning
	Equipment	<ol style="list-style-type: none"> 1. Source equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 4. BTU rating on the pricing sheet indicates input BTU 5. ECM motors or X-13 motors will considered high-efficiency for pricing purposes 	
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Inspect clean and lubricate blower assembly (includes blower housing, blower wheel and motor) 2. Check combustion blower housing for lint and debris and clean as necessary 3. Inspect drain pan and condensate drain lines. Clean as needed 4. Inspect gas pressure and adjust as necessary 5. Check gas pressure and adjust as necessary 6. Inspect for gas leaks 7. Inspect burner assembly—clean and adjust as needed 8. Inspect ignition system and safety controls—clean and adjust as needed 9. Inspect heat exchanger or heating elements 10. Inspect filter system—check for proper attachment to the furnace any dislocated sections and clean as needed 11. Check Amp draw 12. Inspect control box associated controls wiring and connections 13. Clean or replace air filters 14. Fire unit from t-stat and review settings with customer to optimize their goals/system performance 15. Check temperature rise 16. Check for gas leaks 17. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Capacity (tons)	HSF	SEER	Blower Motor	Product Certification	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every Two (2) Years (Hourly/Labor rate)	Repair & Service (Hourly/Labor rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	HVAC	Heat Pump	Electric	2	≥9	≥14	High Efficiency Blower	AHRI Certified								
Residential	HVAC	Heat Pump	Electric	2.5	≥9	≥14	High Efficiency Blower	AHRI Certified								
Residential	HVAC	Heat Pump	Electric	3	≥9	≥14	High Efficiency Blower	AHRI Certified								

Costs Category	Cost Component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> 1. Conduct customer outreach activities 2. Identify potential customers and conduct eligibility assessment 3. Coordinate customer qualification and approval process with PSE 4. Secure customer signature on PSE forms 	N/A
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Perform heat loss & Manual T calculations 2. Take material measurement 3. Verify installation will meet code 4. Draft work order for installation 5. Schedule installation date 6. Secure customer signature on PSE forms 1. Handling fee for obtaining standard permit (mechanical & electrical) and associated labor and inspection time - where applicable 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Conduct duct blaster 2. Shut off power 3. Disconnect wiring 4. Remove and dispose of old refrigerant and lines 5. Remove and dispose of old air handler and outdoor unit 6. Design and build transition and fittings 7. Cut sheet metal to transition points 8. Install new air handler and indoor coil 9. Install new electrical filter channel and standard filtration system 10. Seal internal and external joints 11. Install new outdoor unit 12. Install new R410A compatible refrigerant lines & refrigerant 13. Complete all electrical connections 14. Charge, inspect and test refrigerant lines 15. Check all controls, run through heating and cooling cycles 16. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 17. Check all safety operations 18. Cleanup 19. Discuss installation and operation with homeowner 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Source equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 4. Include outdoor compressor, indoor coil, air handler, new R410A compatible refrigerant lines and refrigerant in pricing. 	N/A
EQUIPMENT	Equipment	<p>Indoor Unit</p> <ol style="list-style-type: none"> 1. Inspect clean blower assembly (includes blower housing, blower wheel and motor) 2. Inspect evaporator coil, drain pan and condensate drain lines. Clean as needed 3. Test condensate pump 4. Inspect refrigerant lines and connection 5. Check Amp draw 6. Inspect control box, associated controls, wiring and connections 7. Clean or replace air filters 8. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 9. Check all safety operations <p>Outdoor Unit</p> <ol style="list-style-type: none"> 1. Inspect unit for proper refrigerant level and adjust if necessary 2. Clean dirt, leaves and debris from inside cabinet 3. Inspect base pan for restricted drain openings - remove obstructions as necessary 4. Inspect coil and cabinet - clean as needed 5. Inspect fan motor for proper wear and damage - lubricate as needed 6. Check outdoor temperature sensors 7. Inspect control box, associated controls/accessories, wiring and connections. Controls may include contactors, relays, circuit boards, capacitors, sump heat and other accessories. All control box and electrical parts should be checked for wear or damage. 8. Inspect compressor and associated tubing for damage 9. Check all safety operations 10. Discuss service with homeowner 	N/A
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Note above 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Venting	Product Certification	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every 12 Months (Flat Rate)	Repair & Service (Hourly labor rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	Water Heat	Tank Style	Gas	40	>0.65	Standard	ENERGYSTAR Certified and Meets 2015 MAECA Standards								
Residential	Water Heat	Tank Style	Gas	50	>0.65	Standard	ENERGYSTAR Certified and Meets 2015 MAECA Standards								
Residential	Water Heat	Tank Style	Gas	40	>0.65	Direct Vent	ENERGYSTAR Certified and Meets 2015 MAECA Standards								
Residential	Water Heat	Tank Style	Gas	50	>0.65	Direct Vent	ENERGYSTAR Certified and Meets 2015 MAECA Standards								

Cost Category	Cost Component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> 1. Conduct customer outreach activities 2. Identify potential customers and conduct eligibility assessment 3. Coordinate customer qualification and approval process with PSE 4. Secure customer signature on PSE form(s) 	N/A
STANDARD INSTALLATION	Permit/Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable 1. Shut off power 2. Shut off gas line and disconnect 3. Check inlet water pressure 4. Disconnect existing venting 5. Disconnect existing cold water heater 6. Install tank stand or plumb to the floor (do not include cost of stand) 7. Install new water heater <ul style="list-style-type: none"> o Include 2" new water flex, 1" gas flex & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill tank 12. Test, check combustion and firing rate 13. Check combustion of furnace if common venting used 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with homeowner 	<ol style="list-style-type: none"> 1. Craw space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Cross venting 7. Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code o Expansion tank o Trip pin o Gas line straps & 2x4 bracing o Barrier Post o Water Alarm 8. Extending gas line for additional appliances 9. Priming and painting gas line 10. Reighting other appliances if fuel line removed past G valve
	Equipment	<ol style="list-style-type: none"> 1. Source equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	N/A
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Inspect ignition system and safety controls—clean and adjust as needed 2. Inspect burner assembly—clean and adjust as needed 3. Inspect flue system—check for proper attachment to the water heater, any disconnected sections and for signs of corrosion 4. Check gas pressure and adjust as necessary 5. Inspect for gas leaks 6. Inspect for water leaks—pressure-release valve 7. Check the anode rod 8. Drain the tank and flush out sediment 9. Fill tank 10. Check temperature and adjust to 120 degrees as necessary 11. Inspect control box, associated controls, wiring and connections 12. Inspect for water leaks 13. Check all safety operations 14. Discuss service with homeowner 15. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Product Certification	Product Capabilities	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every Two (2) Years (Flat Rate)	Receipt & Service (Hourly labor rate)	Model	Warranty Term (Years)
Residential	Water Heat	Tank Style	Electric	40	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CSA-2015*** or proprietary (MCI) socket							
Residential	Water Heat	Tank Style	Electric	50	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CSA-2015*** or proprietary (MCI) socket							
Residential	Water Heat	Tank Style	Electric	40	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CSA-2015*** or proprietary (MCI) socket							
Residential	Water Heat	Tank Style	Electric	50	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CSA-2015*** or proprietary (MCI) socket							
Residential	Water Heat	Heat Pump	Electric	30	≥ 1.8*	NEEA Northern Climate Specifications approved and 2015 NAECA Standards	ANSI/CSA-2015*** or proprietary (MCI) socket							
Residential	Water Heat	Heat Pump	Electric	50	≥ 1.8*	NEEA Northern Climate Specifications approved and 2015 NAECA Standards	ANSI/CSA-2015*** or proprietary (MCI) socket							

* Northern Climate Energy Factor
** <http://naeca.org/docs/default-source/northern-climate-heat-pump-water-heater-specification-final-product-list.pdf>
*** CSA-2015 socket

Cost Category	Cost Component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> 1. Create customer checklist activities 2. Identify potential customers and product eligibility assessment 3. Coordinate customer qualification and approval process with PSE 4. Secure customer signature on PSE forms 	N/A
STANDARD INSTALLATION	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Prepare area for new water heater to the floor (do not include cost of stand) 6. Install new water heater o Include 2 new water files 7. Connect wiring with 2 new wire nuts 8. Fill Tank 9. Set temperature and check all controls 10. Test for safety operations 11. Clean site 12. Discuss installation and operation with homeowner 	N/A
	Equipment	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & Inventory management 3. Provide warranty management 	<ol style="list-style-type: none"> 1. Craw space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocation of venting 5. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barner Foot o Water Hammer Arrestor o Fielded line 1. Note above
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Flush tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal)	Capacity (kBu/hr)	Energy Factor	Thermal Efficiency	Venting	Product Certification	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every Two (2) Years (Flat Rate)	Repair & Service (Hourly labor rate)	Make (Brand)	Model	Warranty Term (Years)
Commercial	Water Heat	Tank Style	Gas	50		> 67	Standard	Standard	ENERGY STAR Certified								
Commercial	Water Heat	Tank Style	Gas	50		> 67	Direct Vent	Direct Vent	ENERGY STAR Certified								
Commercial	Water Heat	Tank Style	Gas	75	upto 199	> 95	Standard	Standard									
Commercial	Water Heat	Tank Style	Gas	75	upto 199	> 95	Direct Vent	Direct Vent									

Costs Category	Cost Component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> 1. Conduct customer outreach activities 2. Identify potential customers and conduct eligibility assessment 3. Coordinate customer qualification and approval process with PSE 4. Secure customer signature on PSE form(s) 	N/A
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Verify installation will meet code (venting, combustion air, gas pipe, etc.) 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time—where applicable 1. Shut off power 2. Shut off gas line and disconnect 3. Check inlet water pressure 4. Disconnect wiring 5. Remove and dispose of old water heater 6. Install tanks/line or pump to the floor (do not include cost of stand) 7. Install vent 8. Include 2" new water flow, 1 gas line & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank 12. Fire off unit, check combustion and firing rate 13. Set temperature and check all controls 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with owner 	<ol style="list-style-type: none"> 1. Cover space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open loop systems 7. Code upgrades 8. Adding combustion air 9. B vent 10. Increasing gas line size per code 11. Securing gas line to code 12. Expansion tank 13. Drip pan 14. Barnhooks, straps & 2"x4 bracing 15. Water pipes 16. Water alarm 17. Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Re-lighting other appliances if fuel line removed past G valve
EQUIPMENT	Equipment	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Inspect ignition system and safety controls—clean and adjust as needed 2. Inspect burner assembly—clean and adjust as needed 3. Inspect flue system—check for proper attachment to the water heater, any disconnected sections, and for signs of corrosion 4. Check gas pressure and adjust as necessary 5. Inspect for gas leaks 6. Test (TPR) temperature-pressure-release valve 7. Check the anode rod 8. Drain the tank and flush out sediment 9. Fill tank 10. Check temperature and adjust to 120 degrees as necessary 11. Inspect control box, associated controls, wiring and connections 12. Inspect for water leaks 13. Check all safety operations 14. Discuss safety with owner 15. Discuss service with owner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Thermal Efficiency	Product Capabilities	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every Two (2) Years (Flat Rate)	Repair & Service (Hourly/labor rate)	Make (Brand)	Model	Warranty Term (Years)
Commercial	Water Heat	Tank Style	Electric	50	> 0.95		ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket								
Commercial	Water Heat	Tank Style	Electric	75	> 97		ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket								

* CEA-2045 socket

Costs Category	Components	What should be included in flat rates	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> 1. Conduct customer outreach activities 2. Identify potential customers and conduct eligibility assessment 3. Coordinate customer qualification and approval process with PSE 4. Secure customer signature on PSE form(s) 	N/A
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Verify installation will meet code 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable 	N/A
STANDARD INSTALLATION	Standard Installation	<ol style="list-style-type: none"> 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Install tank stand or plumb to the floor (do not include cost of stand) 6. Install new water heater 7. Include 2" new water flex 8. Connect wiring with 2" new wire nuts 9. Fill tank 10. Set temperature and check all controls 11. Check all safety operations 12. Clean site 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Open loop systems 5. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier post o Water Alarm o Relief line
	Equipment	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	<ol style="list-style-type: none"> 1. Note above
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Drain the tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with owner 	



MUTUAL NONDISCLOSURE AGREEMENT

Puget Sound Energy, Inc. a Washington corporation with offices at 10885 NE 4th St., Bellevue, WA ("PSE") and the "Other Party" identified on the signature page below are considering a business transaction (the "Transaction"). In connection with the proposed Transaction, the parties are willing to disclose confidential information to each other on the terms and conditions stated in this agreement (this "Agreement").

The parties, intending to be legally bound, agree that:

I. Confidentiality.

1. In connection with the Transaction, each party (a "Disclosing Party") is prepared to make available to the other party (a "Receiving Party") certain Confidential Information regarding the Disclosing Party's business. The Receiving Party agrees to keep such information confidential, and protect all Confidential Information from disclosure by using the highest practical degree of care and at least the same care the Receiving Party uses to protect its own confidential information.

2. "Confidential Information" means: (i) any and all information with respect to the status of or the terms of the Transaction, and (ii) any trade secrets or other confidential or proprietary information of the Disclosing Party, whether of a technical, business or other nature (including, without limitation, the relationship between the parties, and information relating to the Disclosing Party's technology, software, products, services, designs, methodologies, know how, business plans, finances, marketing plans, customers, employees, prospects or other affairs). Confidential Information also includes any information that has been made available to the Disclosing Party by third parties that the Disclosing Party is obligated to keep confidential.

3. Receiving Party may not disclose Confidential Information to third parties, provided, however, that notwithstanding the foregoing, Receiving Party may disclose Confidential Information to its employees, consultants, advisors, or other agents (its "Representatives") only to the extent necessary for such Representatives to assist the Receiving Party in evaluating the Transaction, provided that such Representatives agree to keep such Confidential Information confidential in accordance with this Agreement. A breach of this Agreement by a Representative of Receiving Party will be deemed a breach by the Receiving Party, and Receiving Party agrees, at its sole expense, to take all reasonable measures (including but not limited to court proceedings) to restrain its Representatives from prohibited or unauthorized disclosure of the Confidential Information. Receiving Party shall immediately notify Disclosing Party of any actual, probable or reasonably suspected disclosure or unauthorized access to the Disclosing Party's Confidential Information.

4. Receiving Party will not use or allow others to use Confidential Information for any purpose other than evaluating the Transaction.

5. At Disclosing Party's request, Receiving Party will return all materials furnished by Disclosing Party that contain Confidential Information and will destroy or deliver to Disclosing Party any other materials containing Confidential Information, including materials prepared by Receiving Party, unless such Confidential Information is required to be retained by the Receiving Party to comply with applicable law, regulatory requirements or internal document retention policies. Notwithstanding the foregoing, the parties acknowledge that Receiving Party's computer systems may automatically back-up and retain electronic copies of the Confidential Information. To the extent that such systems create copies of the Confidential Information, the Receiving Party may retain such copies in its archival or back-up computer storage. If the Receiving Party retains a copy of any Confidential Information for any reason, including copies on electronic

backup media, then such information shall in all respects remain subject to the terms and conditions of this Agreement.

6. The provisions of this Part I shall not apply to Confidential Information that: (a) is or becomes publicly available through no fault of Receiving Party; (b) is or has been received in good faith by Receiving Party without restriction on use or disclosure from a third party having no obligation of confidentiality to Disclosing Party; or (c) is or has been independently developed by Receiving Party without reference to Confidential Information received from Disclosing Party, as evidenced by Receiving Party's written records.

7. The fact that portions of Confidential Information may be publicly available or otherwise not subject to this Agreement will not affect Receiving Party's obligations with respect to the remaining portion.

8. If Receiving Party is required by judicial or administrative process to disclose Confidential Information, Receiving Party shall promptly notify Disclosing Party and allow Disclosing Party a reasonable time to oppose such process. If disclosure is nonetheless required, Receiving Party may disclose only the Confidential information that, in the written opinion of counsel acceptable to Disclosing Party, Receiving Party is legally required to disclose. Receiving Party shall use its best efforts to limit the dissemination of Confidential Information that is disclosed.

9. This Agreement will not apply to information disclosed to Receiving Party after Receiving Party receives written notice from Disclosing Party that further disclosures will not be treated as confidential.

10. In providing Confidential Information pursuant to this Agreement, Disclosing Party makes no representation, either express or implied, as to adequacy, sufficiency, or freedom from fault of such Confidential Information and incurs no responsibility nor obligation whatsoever by reason thereof, and the furnishing of such Confidential Information will not convey any rights or license with respect to such Confidential Information.

II. No Commitment to Enter Into Transaction. The parties acknowledge that nothing in this Agreement is intended to create or constitute any agency or partnership among the parties, or any legally binding obligation for either party to enter into, or negotiate to enter into, the Transaction.

III. Miscellaneous.

1. This Agreement shall continue in full force and effect for two (2) years from the Effective Date, unless terminated earlier or extended by mutual agreement of the parties.

2. In the event of a default under this Agreement, the non-breaching party will be entitled to injunctive relief, without posting bond, in addition to any other available remedies, including damages. In any litigation concerning this Agreement, the prevailing party will be entitled to recover all reasonable expenses of litigation, including reasonable attorney fees at trial and on any appeal.

3. Any failure by a party to enforce another party's strict performance of any provision of this Agreement will not constitute a waiver of its right to subsequently enforce such provision or any other provision of this Agreement.

4. This Agreement will be governed by and construed and enforced in accordance with the internal laws of the state of Washington, without regard to contrary principles of conflicts of law. The federal and state courts within the State of Washington shall have exclusive jurisdiction to adjudicate any dispute arising out of and relating to this Agreement. Venue for purposes of any litigation arising under this Agreement will be in King County, Washington.

5. All additions or modifications to this Agreement must be in writing and executed by all parties.

EFFECTIVE DATE:

Puget Sound Energy, Inc.

Authorized Signature

[Handwritten signature of Jill R. Larson]

Name: Jill R. Larson, MBA, CPSM

Title: Senior Buyer

Date: January 19, 2016



Puget Sound Energy Trade Ally Service Zones

Zone	City	Zip Code	Zone	City	Zip Code
Zone #01	Toledo/Mossy Rock	98591	Zone #09	Kitsap Peninsula	98329
	Toledo/Mossy Rock	98596		Kitsap Peninsula	98332
Zone #02	Centralia	98531		Kitsap Peninsula	98335
Zone #03	Chehalis	98532	Kitsap Peninsula	98388	
	Chehalis	98568	Zone #10	Federal Way/Auburn	98001
Zone #04	Little Rock/Bucoda	98530		Federal Way/Auburn	98003
	Little Rock/Bucoda	98576		Federal Way/Auburn	98023
	Little Rock/Bucoda	98579	Zone #11	Auburn/Black Diamond	98002
	Little Rock/Bucoda	98589		Auburn/Black Diamond	98010
	Little Rock/Bucoda	98597		Auburn/Black Diamond	98047
Auburn/Black Diamond	98051				
Zone #05	Olympia/Lacey	98501	Auburn/Black Diamond	98092	
	Olympia/Lacey	98502	Zone #12	Enumclaw	98022
	Olympia/Lacey	98503		Zone #13A	Seattle Metro North
	Olympia/Lacey	98506	Seattle Metro North		98102
	Olympia/Lacey	98512	Seattle Metro North		98103
	Olympia/Lacey	98513	Seattle Metro North		98104
	Olympia/Lacey	98516	Seattle Metro North		98105
Zone #06	Graham/Orting	98328	Seattle Metro North		98107
	Graham/Orting	98338	Seattle Metro North		98109
	Graham/Orting	98344	Seattle Metro North		98112
	Graham/Orting	98558	Seattle Metro North		98119
	Graham/Orting	98580	Seattle Metro North		98121
Zone #07	Puyallup/Lake Tapps	98321	Seattle Metro North	98122	
	Puyallup/Lake Tapps	98323	Seattle Metro North	98174	
	Puyallup/Lake Tapps	98360	Seattle Metro North	98195	
	Puyallup/Lake Tapps	98371	Seattle Metro North	98199	
	Puyallup/Lake Tapps	98372	Zone #13B	Seattle Metro South	98106
	Puyallup/Lake Tapps	98374		Seattle Metro South	98108
	Puyallup/Lake Tapps	98375		Seattle Metro South	98116
	Puyallup/Lake Tapps	98385		Seattle Metro South	98118
	Puyallup/Lake Tapps	98390		Seattle Metro South	98126
	Puyallup/Lake Tapps	98391		Seattle Metro South	98134
Puyallup/Lake Tapps	98396	Seattle Metro South		98136	
Seattle Metro South	98144				
Seattle Metro South	98178				
Zone #08	Tacoma Metro	98327		Zone #14	Greater Eastside
	Tacoma Metro	98354	Greater Eastside		98005
	Tacoma Metro	98373	Greater Eastside		98006
	Tacoma Metro	98387	Greater Eastside		98007
	Tacoma Metro	98402	Greater Eastside		98008
	Tacoma Metro	98403	Greater Eastside		98025
	Tacoma Metro	98404	Greater Eastside		98027
	Tacoma Metro	98405	Greater Eastside		98029
	Tacoma Metro	98406	Greater Eastside		98033
	Tacoma Metro	98407	Greater Eastside		98034
	Tacoma Metro	98408	Greater Eastside	98039	
	Tacoma Metro	98409	Greater Eastside	98050	
	Tacoma Metro	98416	Greater Eastside	98052	
	Tacoma Metro	98418	Greater Eastside	98053	
	Tacoma Metro	98421	Greater Eastside	98074	
	Tacoma Metro	98422	Greater Eastside	98075	
	Tacoma Metro	98424	Zone #14A	Kent/Maple Valley	98030
	Tacoma Metro	98433		Kent/Maple Valley	98031
	Tacoma Metro	98439		Kent/Maple Valley	98032
	Tacoma Metro	98443		Kent/Maple Valley	98038
	Tacoma Metro	98444		Kent/Maple Valley	98042
	Tacoma Metro	98445		Zone #14B	Mercer Island
	Tacoma Metro	98446	Zone #14C		Renton/Newcastle
	Tacoma Metro	98447		Renton/Newcastle	98056
	Tacoma Metro	98465		Renton/Newcastle	98057
	Tacoma Metro	98466		Renton/Newcastle	98058
	Tacoma Metro	98467		Renton/Newcastle	98059
	Tacoma Metro	98498			
	Tacoma Metro	98499			

Puget Sound Energy Trade Ally Service Zones

Zone	City	Zip Code	Zone	City	Zip Code
Zone #14D	Normandy Park-Sea Ta	98146	Zone #25	Skagit	98221
	Normandy Park-Sea Ta	98148		Skagit	98232
	Normandy Park-Sea Ta	98158		Skagit	98233
	Normandy Park-Sea Ta	98166		Skagit	98235
	Normandy Park-Sea Ta	98168		Skagit	98237
	Normandy Park-Sea Ta	98188		Skagit	98238
Zone #15	Normandy Park-Sea Ta	98198	Skagit	98255	
	Snoqualmie/North Ben	98014	Skagit	98257	
	Snoqualmie/North Ben	98019	Skagit	98263	
	Snoqualmie/North Ben	98024	Skagit	98267	
	Snoqualmie/North Ben	98045	Skagit	98273	
Zone #16	Snoqualmie/North Ben	98065	Skagit	98274	
	Grotto/Skykomish	98224	Skagit	98283	
Zone #17	Grotto/Skykomish	98288	Skagit	98284	
	Northgate/Lake City	98115	Zone #26	Island	98236
Northgate/Lake City	98117	Island		98239	
Northgate/Lake City	98125	Island		98249	
Northgate/Lake City	98133	Island		98253	
Northgate/Lake City	98155	Island		98260	
Zone #18	Northgate/Lake City	98177	Island	98277	
	Bothell/Woodinville	98011	Zone #28	Kitsap County	98340
	Bothell/Woodinville	98028		Kitsap County	98342
	Bothell/Woodinville	98072		Kitsap County	98345
Bothell/Woodinville	98077	Kitsap County		98346	
Zone #19	Edmonds/Lynnwood	98012	Kitsap County	98364	
	Edmonds/Lynnwood	98020	Kitsap County	98370	
	Edmonds/Lynnwood	98021	Kitsap County	98392	
	Edmonds/Lynnwood	98026	Kitsap County	98383	
	Edmonds/Lynnwood	98036	Zone #28A	Kitsap County	98310
	Edmonds/Lynnwood	98037		Kitsap County	98311
	Edmonds/Lynnwood	98043		Kitsap County	98312
	Edmonds/Lynnwood	98087		Kitsap County	98322
Zone #20	Edmonds/Lynnwood	98275	Kitsap County	98337	
	Snohomish/Monroe	98205	Kitsap County	98353	
	Snohomish/Monroe	98258	Kitsap County	98359	
	Snohomish/Monroe	98272	Kitsap County	98366	
	Snohomish/Monroe	98290	Kitsap County	98367	
Zone #21	Snohomish/Monroe	98296	Kitsap County	98380	
	Gold Bar/Sultan	98251	Kitsap County	98386	
	Gold Bar/Sultan	98252	Kitsap County	98393	
Zone #22	Gold Bar/Sultan	98294	Zone #29	Kittitas	98926
	Everett/Marysville	98201		Kittitas	98934
	Everett/Marysville	98203		Kittitas	98946
	Everett/Marysville	98204	Zone #29A	Upper Kittitas	98068
	Everett/Marysville	98208		Upper Kittitas	98922
	Everett/Marysville	98270		Upper Kittitas	98925
Zone #23	Everett/Marysville	98271	Upper Kittitas	98940	
	Stanwood/Arlington	98223	Upper Kittitas	98941	
	Stanwood/Arlington	98282	Upper Kittitas	98943	
Zone #24	Stanwood/Arlington	98292	Zone #30	Vashon Island	98013
	Whatcom	98220		Vashon Island	98070
	Whatcom	98225	Zone #31	Bainbridge Island	98110
	Whatcom	98226			
	Whatcom	98229			
	Whatcom	98230			
	Whatcom	98240			
	Whatcom	98244			
	Whatcom	98247			
	Whatcom	98248			
	Whatcom	98262			
	Whatcom	98264			
	Whatcom	98266			
	Whatcom	98276			
	Whatcom	98281			
Whatcom	98295				

From: [REDACTED]
Sent: Thursday, February 04, 2016 3:06 PM
To: LeaseBid -- mail --
Subject: Follow up
Attachments: PSE WHHVAC-Request for Quals+Rate Sheet [REDACTED] SEVersion.xlsx; nda [REDACTED].pdf

Hello,
Can you please confirm receipt so we know you have received this? Thank you!

We did our best with this but per one of our questions had some concerns over what was asked for. While not requested, we created notes for each item. The main issue is the > .65 requirement.

There are only ES 0.67 tanks that fit this bill. [REDACTED] About 70% of jobs cannot take these units due to fit and electrical issues. So, we quoted both (and added lines) to reflect this. We also marked in RED on the EF column if we were not fulfilling that requirement. The high efficiency units are also more expensive to install as they are top heavy units and sometimes require 2 – instead of 1 – to install.

Same is true with Direct Vent water heaters. The only Direct Vents that meet the energy requirement are those that are “Power Direct Vents”, which is actually a completely different type of water heater.

Lastly, while the bid explicitly said “exclude EQ straps and bracing”, we have included both EQ straps and bracing as this is required on every water heater. If we are pulling permits, it is likely that there will be OTHER work required but it will be in a portion of homes only. For customer management purposes and customer satisfaction, we believe bundling in the things you already know you have to do makes other required work easier for the customer to understand.

We have not hired an attorney to review the contract but we with agree with it in principle but would like to reserve the right to come back to you in the event we end up working with you.

Thanks very much for the opportunity,
[REDACTED]

BID SHEET INSTRUCTIONS

- * There are six tabs included in this bid sheet, each representing a separate product category.
- * Each tab includes details outlining what should and should not be included in each pricing category
- * All pricing should be entered as a flat rate, absent of taxes, unless noted otherwise
- * All input cells, defined below, must be completed for each product a proposer is submitting to manage

Input cells

Orange Cells - only these input cells should be edited

Application	Category	Type	Fuel	Std (gal)	Energy Factor	Verifying	Product Certification	Standard Installation	Equipment Cost	Warranty Term (Yrs.)	Model
None of these	Water Heat	Tank Style	Gas	40	0.845	Standards	ENERGYSTAR Certified and Meets 2015 NAECA Standards				
None of these	Water Heat	Tank Style	Gas	50	0.845	Standards	ENERGYSTAR Certified and Meets 2015 NAECA Standards				
None of these	Water Heat	Tank Style	Gas	40	0.845	Standards	ENERGYSTAR Certified and Meets 2015 NAECA Standards				
None of these	Water Heat	Tank Style	Gas	50	0.845	Standards	ENERGYSTAR Certified and Meets 2015 NAECA Standards				
None of these	Water Heat	Tank Style	Gas	40	0.845	Standards	ENERGYSTAR Certified and Meets 2015 NAECA Standards				
None of these	Water Heat	Tank Style	Gas	50	0.845	Standards	ENERGYSTAR Certified and Meets 2015 NAECA Standards				

Cost Category	Cost Component	Unit	Qty	Unit Price	Total Cost	Notes
STANDARD INSTALLATION	Permit Fee	1	1	100	100	1. Permit fee to obtain the permit for mechanical and electrical work and inspection work.
	Standard Installation	1	1	1000	1000	1. Standard installation including: <ul style="list-style-type: none"> 1. Shut off power to the unit and disconnect gas line. 2. Check for gas leaks at the gas valve and connections. 3. Check for proper venting. 4. Connect the vent pipe to the venting system. 5. Install the vent pipe through the roof (do not include cost of roof). 6. Install tank stand on a level surface. 7. Install new water heater. 8. Connect the gas line to the gas valve. 9. Check for gas leaks at the gas valve and connections. 10. Check for proper venting. 11. Check for proper venting. 12. Fill the unit with water and air. 13. Check for proper venting. 14. Check for proper venting. 15. Check for proper venting. 16. Check for proper venting. 17. Check for proper venting. 18. Check for proper venting. 19. Check for proper venting. 20. Check for proper venting. 21. Check for proper venting. 22. Check for proper venting. 23. Check for proper venting. 24. Check for proper venting. 25. Check for proper venting. 26. Check for proper venting. 27. Check for proper venting. 28. Check for proper venting. 29. Check for proper venting. 30. Check for proper venting. 31. Check for proper venting. 32. Check for proper venting. 33. Check for proper venting. 34. Check for proper venting. 35. Check for proper venting. 36. Check for proper venting. 37. Check for proper venting. 38. Check for proper venting. 39. Check for proper venting. 40. Check for proper venting. 41. Check for proper venting. 42. Check for proper venting. 43. Check for proper venting. 44. Check for proper venting. 45. Check for proper venting. 46. Check for proper venting. 47. Check for proper venting. 48. Check for proper venting. 49. Check for proper venting. 50. Check for proper venting. 51. Check for proper venting. 52. Check for proper venting. 53. Check for proper venting. 54. Check for proper venting. 55. Check for proper venting. 56. Check for proper venting. 57. Check for proper venting. 58. Check for proper venting. 59. Check for proper venting. 60. Check for proper venting. 61. Check for proper venting. 62. Check for proper venting. 63. Check for proper venting. 64. Check for proper venting. 65. Check for proper venting. 66. Check for proper venting. 67. Check for proper venting. 68. Check for proper venting. 69. Check for proper venting. 70. Check for proper venting. 71. Check for proper venting. 72. Check for proper venting. 73. Check for proper venting. 74. Check for proper venting. 75. Check for proper venting. 76. Check for proper venting. 77. Check for proper venting. 78. Check for proper venting. 79. Check for proper venting. 80. Check for proper venting. 81. Check for proper venting. 82. Check for proper venting. 83. Check for proper venting. 84. Check for proper venting. 85. Check for proper venting. 86. Check for proper venting. 87. Check for proper venting. 88. Check for proper venting. 89. Check for proper venting. 90. Check for proper venting. 91. Check for proper venting. 92. Check for proper venting. 93. Check for proper venting. 94. Check for proper venting. 95. Check for proper venting. 96. Check for proper venting. 97. Check for proper venting. 98. Check for proper venting. 99. Check for proper venting. 100. Check for proper venting.
EQUIPMENT	Equipment	1	1	1000	1000	1. See equipment manufacturer specifications for details.
STANDARD MAINTENANCE	Standard Maintenance	1	1	100	100	1. Annual maintenance including: <ul style="list-style-type: none"> 1. Check for gas leaks. 2. Check for proper venting. 3. Check for proper venting. 4. Check for proper venting. 5. Check for proper venting. 6. Check for proper venting. 7. Check for proper venting. 8. Check for proper venting. 9. Check for proper venting. 10. Check for proper venting. 11. Check for proper venting. 12. Check for proper venting. 13. Check for proper venting. 14. Check for proper venting. 15. Check for proper venting. 16. Check for proper venting. 17. Check for proper venting. 18. Check for proper venting. 19. Check for proper venting. 20. Check for proper venting. 21. Check for proper venting. 22. Check for proper venting. 23. Check for proper venting. 24. Check for proper venting. 25. Check for proper venting. 26. Check for proper venting. 27. Check for proper venting. 28. Check for proper venting. 29. Check for proper venting. 30. Check for proper venting. 31. Check for proper venting. 32. Check for proper venting. 33. Check for proper venting. 34. Check for proper venting. 35. Check for proper venting. 36. Check for proper venting. 37. Check for proper venting. 38. Check for proper venting. 39. Check for proper venting. 40. Check for proper venting. 41. Check for proper venting. 42. Check for proper venting. 43. Check for proper venting. 44. Check for proper venting. 45. Check for proper venting. 46. Check for proper venting. 47. Check for proper venting. 48. Check for proper venting. 49. Check for proper venting. 50. Check for proper venting. 51. Check for proper venting. 52. Check for proper venting. 53. Check for proper venting. 54. Check for proper venting. 55. Check for proper venting. 56. Check for proper venting. 57. Check for proper venting. 58. Check for proper venting. 59. Check for proper venting. 60. Check for proper venting. 61. Check for proper venting. 62. Check for proper venting. 63. Check for proper venting. 64. Check for proper venting. 65. Check for proper venting. 66. Check for proper venting. 67. Check for proper venting. 68. Check for proper venting. 69. Check for proper venting. 70. Check for proper venting. 71. Check for proper venting. 72. Check for proper venting. 73. Check for proper venting. 74. Check for proper venting. 75. Check for proper venting. 76. Check for proper venting. 77. Check for proper venting. 78. Check for proper venting. 79. Check for proper venting. 80. Check for proper venting. 81. Check for proper venting. 82. Check for proper venting. 83. Check for proper venting. 84. Check for proper venting. 85. Check for proper venting. 86. Check for proper venting. 87. Check for proper venting. 88. Check for proper venting. 89. Check for proper venting. 90. Check for proper venting. 91. Check for proper venting. 92. Check for proper venting. 93. Check for proper venting. 94. Check for proper venting. 95. Check for proper venting. 96. Check for proper venting. 97. Check for proper venting. 98. Check for proper venting. 99. Check for proper venting. 100. Check for proper venting.



MUTUAL NONDISCLOSURE AGREEMENT

Puget Sound Energy, Inc. a Washington corporation with offices at 10885 NE 4th St., Bellevue, WA ("PSE") and the "Other Party" identified on the signature page below are considering a business transaction (the "Transaction").

The parties, intending to be legally bound, agree that:

I. Confidentiality.

1. In connection with the Transaction, each party ("Disclosing Party") is prepared to make available to the other party ("Receiving Party") certain Confidential Information regarding the Disclosing Party's business.

2. "Confidential Information" means: (i) any and all information with respect to the status of or the terms of the Transaction, and (ii) any trade secrets or other confidential or proprietary information of the Disclosing Party.

3. Receiving Party may not disclose Confidential Information to third parties; provided, however, that notwithstanding the foregoing, Receiving Party may disclose Confidential Information to its employees, consultants, advisors, or other agents (its "Representatives") only to the extent necessary for such Representatives to assist the Receiving Party in evaluating the Transaction.

4. Receiving Party will not use or allow others to use Confidential Information for any purpose other than evaluating the Transaction.

5. At Disclosing Party's request, Receiving Party will return all materials furnished by Disclosing Party that contain Confidential Information and will destroy or deliver to Disclosing Party any other materials containing Confidential Information.

backup media, then such information shall in all respects remain subject to the terms and conditions of this Agreement.

6. The provisions of this Part I shall not apply to Confidential Information that: (a) is or becomes publicly available through no fault of Receiving Party; (b) is or has been received in good faith by Receiving Party without restriction on use or disclosure from a third party having no obligation of confidentiality to Disclosing Party; or (c) is or has been independently developed by Receiving Party without reference to Confidential Information received from Disclosing Party.

7. The fact that portions of Confidential Information may be publicly available or otherwise not subject to this Agreement will not affect Receiving Party's obligations with respect to the remaining portion.

8. If Receiving Party is required by judicial or administrative process to disclose Confidential Information, Receiving Party shall promptly notify Disclosing Party and allow Disclosing Party a reasonable time to oppose such process.

9. This Agreement will not apply to information disclosed to Receiving Party after Receiving Party receives written notice from Disclosing Party that further disclosures will not be treated as confidential.

10. In providing Confidential Information pursuant to this Agreement, Disclosing Party makes no representation, either express or implied, as to adequacy, sufficiency, or freedom from fault of such Confidential Information and incurs no responsibility nor obligation whatsoever by reason thereof.

II. No Commitment to Enter Into Transaction. The parties acknowledge that nothing in this Agreement is intended to create or constitute any agency or partnership among the parties, or any legally binding obligation for either party to enter into, or negotiate to enter into, the Transaction.

III. Miscellaneous.

1. This Agreement shall continue in full force and effect for two (2) years from the Effective Date, unless terminated earlier or extended by mutual agreement of the parties.

2. In the event of a default under this Agreement, the non-breaching party will be entitled to injunctive relief, without posting bond, in addition to any other available remedies, including damages.

3. Any failure by a party to enforce another party's strict performance of any provision of this Agreement will not constitute a waiver of its right to subsequently enforce such provision or any other provision of this Agreement.

4. This Agreement will be governed by and construed and enforced in accordance with the internal laws of the state of Washington, without regard to contrary principles of conflicts of law. The federal and state courts within the State of Washington shall have exclusive jurisdiction to adjudicate any dispute arising out of and relating to this Agreement.

5. All additions or modifications to this Agreement must be in writing and executed by all parties.

EFFECTIVE DATE: January 19, 2016

Puget Sound Energy, Inc.

Authorized Signature: [Handwritten Signature]

Name: Jill R. Larson, MBA, CPSM

Title: Senior Buyer

Date: January 19, 2016



From: [REDACTED]
Sent: Thursday, February 04, 2016 3:41 PM
To: LeaseBid -- mail --
Cc: [REDACTED]
Subject: FW: PSE Lease Solutions Program RFQual
Attachments: Draft Service Partner Agreement.docx; PSE CAN Zone List.pdf; PSE signed NDA.pdf; Copy of PSE Path Bid Sheet.xlsx; Copy of PSE Hybrid Path Bid Sheet.xlsx; Copy of Partner Path Bid Sheet.xlsx

Signed agreements and bid sheets attached.



From: [REDACTED]
Sent: Thursday, February 04, 2016 2:43 PM
To: [REDACTED]
Subject: FW: PSE Lease Solutions Program RFQual

[REDACTED]

You had received this before from [REDACTED] but thought I'd send anyway. Looks like 3 docs for you to sign/fill in





From: [REDACTED]
Sent: Wednesday, January 20, 2016 3:31 PM
To: [REDACTED]
Subject: RE: PSE Lease Solutions Program RFQual

There were still some issues opening the Excel documents. I was able to open and save; see attached.

The 3 separate excel documents they emailed us are actually just one excel spreadsheet. You'll find several tabs at the bottom when you open it up.



From: [REDACTED]
Sent: Wednesday, January 20, 2016 2:20 PM
To: [REDACTED]
Cc: [REDACTED]
Subject: RE: PSE Lease Solutions Program RFQual

Scott reported problems opening files imbedded in PSE document so I've attached them here.....



**DRAFT Service
Partner Purchase Agr**

From: [REDACTED]
Sent: Wednesday, January 20, 2016 9:17 AM
To: [REDACTED]
Cc: [REDACTED]
Subject: FW: PSE Lease Solutions Program RFQual

Team,

Please review this new program opportunity from PSE. We should plan to submit a response. It could be a significant upside opportunity for us.

[REDACTED]

This new proposed program includes two new options – “Hybrid Path” and “Partner Path”. I would expect we would be interested only in these two new paths.

It looks like our RFQ response consists primarily of completing pricing workbooks which [REDACTED] should complete as a first pass for us.

[REDACTED] should review Partner Purchase Agreement and identify any changes we would want.

[REDACTED]

Thanks everyone.

[REDACTED]

From: LeaseBid -- mail -- [<mailto:LeaseBid@pse.com>]
Sent: Wednesday, January 20, 2016 8:47 AM
To: LeaseBid -- mail --
Subject: RE: PSE Lease Solutions Program RFQual

Dear valued partners,

We are excited to introduce an enhanced business opportunity for your consideration in connection to PSEs Lease Solutions service. To effectively deliver a comprehensive lease offer, that will expand participation in the existing market by current non-participants, PSE would like to work with its valued service partners to facilitate the equipment distribution and in-home fulfillment tasks, including pre-installation site checks, permitting, installation, maintenance, and repair services. In addition, the expanded Lease Solutions service will offer the flexibility for contracted service partners to also source and manage the equipment, should that choice be preferred.

Since you represent the values PSE strives for in delivering safe, dependable and efficient products and services to its customers, we need your help to effectively deliver this service.

The attached Request for Qualifications and Rates document provides the details of the service as well as embedded files for review and the rate sheets for your response(s). Please open each attachment to be fully informed of the process and access the forms for your response.

NOTE: One of the embedded files is a Non-Disclosure Agreement (NDA) that is to be printed, signed, scanned and returned with your email response if your company did not provide an NDA in 2015 during the previous RFQ interest.

As per the instructions in the RFQ, all questions about the program and bid process are to be submitted via email to this email address within the documented schedule. PSE looks forward to receiving your questions to enable clarification for all bidders, which will allow PSE to evaluate the responses equally.

Thank you for your interest in supporting PSE with the decisions to be made concerning the Lease Solutions service.

Sincerely,
PSE Lease Solutions Selection Team

DRAFT
Service Partner Purchase Agreement

This Service Partner Purchase Agreement (“**Agreement**”), dated as of February 4, 2016 (“**Effective Date**”), is made by and between [REDACTED] a Washington corporation with offices at [REDACTED] [REDACTED] (“**Service Partner**”), and **Puget Sound Energy**, a Washington corporation with offices at 355 110th Ave NE, Bellevue, WA 98004 (“**PSE**”).

Background

Service Partner is in the business of, and has expertise in, providing certain third party water heating and HVAC equipment, (collectively, “**Product**”) and Services, as hereinafter described and is registered as Tier 1 status in PSE’s Contractor Alliance Network (CAN); and

PSE is Washington State’s oldest local energy company serving millions of electric and natural gas customers across in 10 counties. A subsidiary of Puget Energy, PSE meets the energy needs of its customers, in part, through incremental, cost-effective energy efficiency, procurement of sustainable energy resources, and far-sighted investment in the energy-delivery infrastructure.

PSE is contracting for expert resources to assist in PSE’s new Leasing Program, specifically in the area of product installation and maintenance services for residential and commercial gas and electric water heaters and residential gas forced air furnaces and electric air-source heat pumps. PSE’s existing program includes residential and commercial gas water heaters and the new program is designed to incorporate providing those products as well as expanding to add electric water heaters and electric and gas heating products.

PSE and its Affiliates wish to obtain through Service Partner and Service Partner wishes to provide to PSE such Product and Services as hereinafter described pursuant to the term and conditions of this Agreement.

Agreement

In consideration of the mutual consideration, promises, representations, covenants and obligations set forth in this Agreement, the receipt and sufficiency of which are hereby acknowledged, the parties agree as follows:

This Agreement includes this signature page and Schedules, as listed below, and any Order Forms, Statements of Work, schedules, exhibits, amendments or addendums referencing this Agreement that are mutually executed by the parties at a later time.

- Schedule A - Definitions
- Schedule B –Performance Measurement
- Schedule C – PSE Path for customer Sourcing
- Schedule D – Hybrid Path for customer Sourcing
- Schedule E – Service Partner Path for customer Sourcing
- Schedule F – Maintenance and Repair
- Schedule G – Warranty Process
- Schedule H – General Terms and Conditions
- Schedule I - Fee Schedule
- Exhibit 1 – Water Heater Specifications
- Exhibit 2 – Residential HVAC Specifications
- Exhibit 3 – Water Heater Scope of Work

The parties hereby agree to comply with the terms and conditions set forth in this Agreement. This Agreement may be executed in counterparts and exchanged by facsimile or electronically scanned copy. Each such counterpart shall be deemed to be an original and all such counterparts together shall constitute one and the same Agreement. The authorized representatives of the parties have executed this Agreement by their signatures below:

Puget Sound Energy

[REDACTED]

By:

By:

Authorized Signature

Name:

Title: _____

Authorized Signature

Name:

Title:

DRAFT

Schedule A - Definitions

1. Definitions. The following definitions shall apply for purposes of this Agreement:

- 1.1. **Agreement** shall mean the signature page of this Service Partner Purchase Agreement, Schedules attached to the signature page and any Order Forms, statements of work, schedules, exhibits, amendments or addendums referencing this Agreement that are mutually executed by the parties.
- 1.2. **Cost** means Service Partner's total cost of goods, including freight, handling fees and/or order fees that have been charged to Service Partner by the OEM or distributor providing the Product, and any third party fees associated with the transaction, such as credit card fees or other transaction fees charged to Service Partner. Service Partner does not initiate or add any self-imposed fees to the transaction.
- 1.3. **Deliverables** means those reports, documentation, and schedules to be developed and/or provided by Service Partner to PSE in tangible or electronic form.
- 1.4. **Destination Site** means the residence, facility or office or other location, as designated in this Agreement or the Order, for where the Product and/or Delivery is intended to finally reside and be put to use.
- 1.5. **Maintenance and Support Services** shall mean the OEM support and maintenance services ordered by the PSE from the Service Partner for the Product(s), service levels and response times specified on an Order.
- 1.6. **OEM** means the original equipment manufacturer for the Products to be ordered under this Agreement.
- 1.7. **Order or Order Form** means a Service Partner Order Form or quotation together with a confirming PSE Purchase Order.
- 1.8. **Order Portal** means a secure webportal of Service Partner through which PSE may request all information required in Service Partner Order Form(s) and submit PSE Purchase Order information to place an order.
- 1.9. **Product** means those items specified on an Order by OEM make and model numbers.
- 1.10. **Price** means the price specified in the Order for the Product.
- 1.11. **Service Partner Order Form** means the form of quotation, order form or other document used for the purpose of offering specific Product(s) and/or Deliverable(s) to PSE pursuant to this Agreement. Service Partner Order Form may be provided via on-line links or document scans.
- 1.12. **Services** means the reseller services provided by Service Partner under this Agreement; i.e. sourcing and fulfilling the Product and/or providing Deliverables identified in an Order.
- 1.13. **Warranty Documentation** means specific Warranty Documentation of the OEM for the Product ordered that grants PSE's Service Partners rights to process warranty claims. Warranty Documentation may be provided document scans.

Additional definitions may be contained elsewhere in this Agreement.

Schedule B –Performance Measurement

1. OEM Warranty Registration and Certification.

- 1.1. Service Partner agrees PSE may rely on Service Partner's expertise as an OEM representative to properly register the Product(s) with OEM in the full legal name of Puget Sound Energy and to provide PSE any and all documentation which OEM may require upon audit as proof of PSE's entitlement to the Product purchased and assign to PSE all warranties associated with the Product. Such proof of entitlement may be in the form of Certificates issued to PSE.
- 1.2. Upon request, Service Partner shall review and certify with the OEM the support information for Products purchased by PSE or its Affiliates under this Agreement or otherwise.

2. OEM Documentation. Service Partner shall forward to PSE all associated documentation provided or made available by the OEM at no additional cost, such as operator/user manuals, training materials, guides, and functional/technical specifications, whether in writing, electronic means or otherwise, (collectively "Documentation").

3. Service Level. The following Service Level Agreement has been jointly developed by Service Partner and Puget Sound Energy (PSE).

4. Program Description.

- 4.1. Puget Sound Energy's (PSE) Lease Solutions Service provides its customers with equipment and services for natural gas and electric water heaters, natural gas furnaces and electric air source heat pumps. PSE's customer pay Puget Sound Energy a monthly fee to lease this equipment as well as to cover repair and maintenance services per lease terms. The program is internally supported by a Fulfilment Manager, dedicated service representatives, inspectors, and other support staff. The program serves both commercial and residential customers. PSE has contracted with Service Partner to provide Services, including labor, permits, materials, equipment and all resources for the installation, repair, maintenance and removal of equipment under the lease program as requested from time to time by PSE's authorized representative(s).
- 4.2. PSE's Fulfilment Manager, or designee, shall serve as the primary contact for this Agreement. Unless otherwise designated in this contract or scope of work, Service Partner shall contact the Fulfilment Manager with any concerns or issues that arise.

5. Service Expectations.

- 5.1. Service Partner shall provide a high level of service at a competitive price while addressing an innovated approach over the life of this five year contract to provide equipment installation and removal services. Service Partner shall work closely with PSE's Lease Solutions Department.
- 5.2. Service provider shall be responsible for completing customer site inspections and or installations for all jobs accepted by provider within 48 hour period during normal business hours defined as 7 a.m. to 5 p.m. Monday through Saturday. No overtime or after hours shall be charged, unless approved by a PSE. No work shall be conducted on Sundays or holidays unless prior authorization is provided by PSE. Holidays are observed as: New Year's Day, Memorial Day, July 4th, Labor Day, Thanksgiving, and Christmas.
- 5.3. All jobs will be allocated based on product and zip code service agreements, and assigned based on partner acceptance. If partner accepts job, other partners will no longer be able to view or accept the same job
- 5.4. Service Partner will be responsible for ongoing repair and maintenance services for accepted jobs. PSE has right to put repair and maintenance work up for bid to all eligible PSE contractors if the original contractor is unable to perform.
- 5.5. All work shall be performed by trained, competent personnel, in the accordance with the best commercial and industry practices that meet manufacturer's standard.
- 5.6. Service Partner shall supply parts to support the installation and maintenance of equipment under PSE's leased program.
- 5.7. PSE requires identification stickers on all leased equipment. At the time of installation, Service Partner shall place an approved sticker supplied by PSE on the equipment if one is not already in place. This sticker identifies equipment as PSE's property. All parts utilized in conjunction with this agreement shall be new and shall meet original equipment manufacturers (OEM) specifications and shall restore the equipment so that it will perform to its original design specifications.
- 5.8. Precautions shall be exercised at all times for the protection of persons and property. Any fines levied for failure to comply with these requirements shall be borne solely by the responsible Service Partner.
- 5.9. Service Partner shall provide quality installation and workmanship keeping both PSE and PSE's customer from experiencing any health, legal or catastrophic event which might put PSE or their customer at risk.

- 5.10. In addition to all other warranties that may be supplied, Service Partner shall warrant its service against faulty labor and/or defective material for a period of 360 days from completion of work. This warranty requirement shall remain in force for the full warranty period.
 - 5.11. Equipment supplied by Service Partner shall be warranted by the OEM at the OEM standard warranty unless otherwise specified in Schedule G-Warranty Process. Service Partner shall process warranty claims per Schedule G-Warranty Process.
 - 5.12. Service Partner shall be responsible for providing PSE with a monthly report (the "Report") within ten (10) business days after the end of each calendar month detailing all installations, repairs, maintenance visits, disposals, warranties and code upgrades in the form required by PSE.
 - 5.13. Service Partner shall not charge PSE a wasted trip fee for any site visits that do not result in billable activities.
 - 5.14. Service Partner shall not charge PSE a fuel surcharge fee to recover increase in cost of fuel from the time agreement is executed
 - 5.15. Price increases shall be in full force and effective on anniversary date, as stipulated in Schedule I-Fee Schedule.
 - 5.16. Service Partner shall obtain all necessary permits required by local jurisdiction upon installation. Permit numbers shall be included on all invoices. Service Partner shall charge PSE the flat permit cost plus a \$20 fee.
 - 5.17. Permits shall be kept on record by Service Partner.
 - 5.18. PSE reserves the right to audit permit records at any time.
6. **Salvage/Disposal** Service Partner shall dispose of all residential and commercial equipment and parts removed under this Agreement in accordance with existing municipal, state and federal disposal standards. Service Partner shall not reuse or reinstall any equipment or parts removed during the course of work performed under this Contract. PSE reserves the right to request removed equipment and/or parts be returned to PSE as requested by the Fulfilment Manager.
7. **Account Management**
- 7.1. All questions and requests will be responded to in a professional and timely manner. Service Partner service goal is to be available during regular business hours Monday – Saturday, 7:00 AM to 5:00 PM Pacific Time. The Service Partner account team will provide responses to voicemails and emails within 30 minutes on normal business days.
 - 7.2. Every effort will be made to satisfy urgent requests and questions with an immediate response. These requests should go through the Service Partner Account team as listed below:
Account questions:
 - 7.3. Quarterly Business Review (QBR) – PSE and Service Partner shall agree to meet on a periodic, as needed basis to discuss the overall progress of the account and assess areas that may need improvement
2. **Account Management - Problem Resolution.**
- 2.1. PSE reserves the right to dispute any charges submitted for work performed under this Agreement. A program representative shall notify the approved Service Partner contact upon receipt of such dispute without penalty.
 - 2.2. Service Partner shall work with PSE to remedy any billing problems as soon as possible.
3. **Bill Statement Program**
- 3.1. Service Partner shall submit invoices to PSE electronically upon successful completion work. Invoice and payment requirements are further detailed in GC-2 Payments in PSE's General Conditions. Service Partner shall list all individual charges and related descriptions on each invoice, for both commercial and residential work. Service Partner shall also include water heater barcode sticker on all invoices. Charges and descriptions shall be congruent with pricing/descriptions on the approved lists, attached hereto. Any invoice(s) not in conformance with pricing as delineated in Schedule I-Fee Schedule shall not be processed until a mutual resolution is reached.
 - 3.2. Payment terms shall be Net 30, per invoice date receipt by PSE.
4. **Disaster Recovery Plan**
Service Partner shall enforce a comprehensive Business Continuity and Disaster Recovery Plan to fully support the Deliverables contained within this Agreement.
5. **Quarterly Audit/Business Review**
Service Partner will provide quarterly activity reports for the following areas:
- a. Overall number of installation
 - b. Number of code upgrades

- c. Itemized components utilized in upgrades
- d. PSE complaints
- e. Detail with corrective action

6. Cost Management Proposals (CMPs)

Service Partner is committed to helping PSE find efficient ways to improve process and reduce overall spend. As part of the overall service offering, Service Partner will actively make recommendations based on an in-depth understanding of PSE's business that is gained over time. These recommendations are referred to as Cost Management Proposals (CMPs). PSE must approve each CMP before it is implemented.

7. PSE Service

Service Partner will at all times maintain a high level of PSE service and satisfaction during the term of this Agreement. Without limiting the generality of the foregoing, Service Partner:

- a. will respond to PSEs within one (1) working day of an initial request and will keep appointments or contact PSEs not less than 24 hours in advance of an appointment to reschedule;
 - b. will clean up the work area to the same or better conditions after any installation or service, and will follow all state and local requirements to ensure proper recycling and/or disposal of debris or waste materials;
 - c. will provide same day customer contact to respond to PSEs relating to (as applicable) (i) the quality of any equipment sold, (ii) the quality of the installation service, (iii) the PSE's satisfaction with the services or with the equipment provided or (iv) scheduling repairs to the equipment installed by Service Partner that does not comply with the warranty set forth in Schedule G-Warranty Process. With respect to such repairs, Service Partner will use its best efforts to perform all repair work at the earliest opportunity during its normal work schedule (but in any event, no later than four (4) calendar days after contacted by PSE) and at no additional charge to the PSE. If a repair is necessary to provide PSE with hot water, heat, or if PSE's health or safety is impaired, Service Partner will perform the repair within 24 hours;
 - d. will immediately take all necessary safety precautions and appropriate actions to remedy any unsafe condition related to the equipment or worksite;
 - e. will not mislead PSEs or engage in any unfair or deceptive trade practice.
8. **Permitting.** Service Partner will secure all necessary permits for and comply with all applicable state, county and local laws, building codes and regulations with respect to or relating to any services provided or equipment installed.
9. **Warranty.** Service Partner will provide a one year parts and labor warranty, and warranties that all products used or installed by Service Partner will be free from defects in materials and workmanship under normal use and service. In addition, Service Partner will pass to PSEs all applicable manufacturer's warranties on any equipment.
10. **Job Equipment and Expenses.** Service Partner shall be solely responsible for procuring, paying for and maintaining any tools, equipment or supplies necessary or appropriate to provide Services in accordance with the Program requirements.

11. Inspections

PSE may, but shall have no obligation to, inspect and verify the work of the Service Partner and/or contact PSEs for the purpose of verifying Service Partner's compliance with the terms of this Agreement. PSE may conduct inspections on a random basis and with or without notice to Service Partner. Service Partners are required to cooperate with all PSE requested inspections. If any services or equipment provided by Service Partner do not meet Program specifications and requirements, as detailed in Exhibits 2 & 3, Service Partner must repair the installation and/or replace the equipment at its sole expense until it meets Program specifications within fifteen (15) days of notification of such non-compliance by PSE. If a repair is necessary to provide PSE with hot water, heat, or if PSE's health or safety is impaired, Service Partner will perform the repair within 24 hours. The making of (or failure or delay in making) any inspection by PSE shall not relieve Service Partner of responsibility for performance of its obligations under this Agreement.

12. Assignment and Subcontracting Prohibited

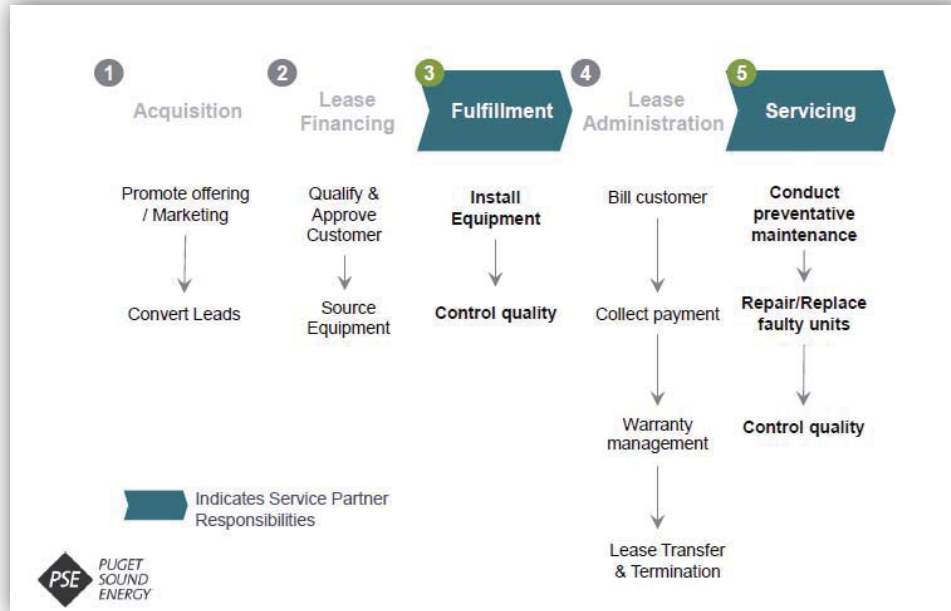
- 12.1. Service Partner shall not (by contract, operation of law or otherwise) delegate or subcontract performance of any of its obligations under this Agreement or any work it performs for any PSE without prior written notice to PSE.
- 12.2. Any such delegation or subcontracting without prior written notice to PSE shall constitute a material default of this Agreement.
- 12.3. No delegation or subcontracting of this Agreement, with or without PSE's consent, shall relieve Service Partner of its responsibility to perform its obligations under this Agreement.

- 12.4. Service Partner shall, at all times, be fully responsible for the performance, acts and omissions of Service Partner's employees, contractors, subcontractors and any other person who performs or furnishes any services to PSEs under the Program.
- 12.5. All such persons shall be fully experienced and properly qualified to perform the obligations of Service Partner under this Agreement.
13. **PSE or its Representative Owned Inventory.** Service Partner must adhere to the following requirements with respect to certain PSE owned inventory:
- 13.1. PSE or its representative holds in inventory certain products that may be installed by Service Partner at a PSE's site in connection with the Program. Upon mutual agreement by Service Partner and PSE, PSE or its representative may transfer certain inventory to Service Partner (the "Consigned Inventory"), to be used by Service Partner to perform installations in PSE homes.
- 13.2. Service Partner agrees to hold all Consigned Inventory as PSE's or its representative's property for the sole purpose of installing such inventory in a PSE's home as part of the Program as designed and agreed upon between PSE and said Service Partner. PSE or its representative shall at all times retain title to the Consigned Inventory.
- 13.3. All Consigned Inventory will be segregated and accounted for separately from Service Partner's other inventories, and Service Partner shall be responsible to PSE or its representative for any discrepancies in the amount of Consigned Inventory, or any loss or damage to the Consigned Inventory.
- 13.4. Service Partner shall maintain an insurance policy covering all Consigned Inventory at its full value and shall provide PSE, at its request, with proof of such insurance coverage. In case of loss relating to the Consigned Inventory, Service Partner shall remit to PSE or its representative the proceeds of such insurance, or if none, the price of any Consigned Inventory so damaged or lost.
- 13.5. Service Partner may be required, at the request of PSE, to include with Report required by Section 2 of this Agreement the following information: (i) the amount of all Consigned Inventory installed by Service Partner during the previous month; and (ii) the Consigned Inventory remaining in Service Partner's possession at the end of the previous month. PSE or its representative may, at any time during the Service Partner's usual business hours, proceed with an audit of the Consigned Inventory, and examine all accounting books concerning the Consigned Inventory.
- 13.6. PSE or its representative may, at its option, execute and file all such instruments, including Uniform Commercial Code financing statements, as may be necessary to confirm and to disclose PSE's or its representative's title to the Consigned Inventory, and Service Partner authorizes the same. Service Partner will inform its lenders, if any, that has a security interest in any of Service Partner's inventory or equipment that the Consigned Inventory is owned by PSE or its representative.

Schedule C – PSE Path for customer Sourcing

Overview:

PSE has designed the Lease Solutions program to be flexible to allow Service Partner optional methods for obtaining customer leads and sourcing equipment. This Schedule C describes the option for the initial contact by the customer directly with Puget Sound Energy. Below are the steps for this process.



1. Reporting, Invoicing, and Payment Terms

- 1.1. **Reporting.** Service Partner shall report on a monthly and quarterly basis per Schedule B-Performance Measurement , paragraph 3.2 for payment processing and Schedule H- General Terms and Conditions paragraph 12 for audit purposes.
- 1.2. **Payment Terms.** Subject to reconciliation with the terms of this Agreement *and the Order Form*, including verification that the Product was installed at the Destination Site, the invoice shall be paid (“paid” being defined as “issuance of payment from PSE’s Accounts Payable Department”) net 30 days after receipt of a **valid invoice at the above referenced remit-to address.**
- 1.3. **Disputed Invoices.** Any invoice or portion thereof that is subject to a good faith dispute will not be paid; in such case, PSE will promptly notify Service Partner of any rejected invoice or portion thereof, with reasons for such rejection. The rejected costs, adjusted to the extent as mutually agreed to, shall then be re-invoiced on a separate invoice
- 1.4. **Currency.** Invoices shall call for payments in currency set forth on Order Form, and shall accurately reflect the amount(s) of the Price set forth in the Order. Changes in the Price shall only be made in accordance with specific provisions for adjustments set forth in this Agreement.
- 1.5. **Price.** The Price to be paid by PSE to Service Partner for the Product shall be specified in the Order and shall represent PSE’s sole financial liability and obligation to Service Partner for the delivery of the Product and/or Deliverable. The Price shall consist of fees set forth in Schedule I – Fee Schedule.
- 1.6. **Tax.** PSE will pay any federal, state, and local sales, use, withholding tax, duties or similar taxes imposed or based on the sale of Products under this Agreement. Such taxes will be separately stated on Service Partner’s invoices and reported and paid to appropriate governmental authorities by Service Partner. At PSE’s request, Service Partner will file any certificate or other document which may cause any such tax to be avoided or reduced, and cooperate with PSE in contesting any such tax or in claiming, on PSE’s behalf, refunds of any such taxes paid by or on behalf of PSE.

Service Partner shall be solely responsible for the payment of all taxes that apply to Service Partner's operations, such as payroll or income taxes.

2. **Title, Risk of Loss, Returns**

2.1. **Title.** Service Partner shall transfer to PSE good and merchantable title to the Deliverables and Product, free from all liens, encumbrances and claims of others, upon delivery of the Deliverables and Product to Destination Site and its receipt by PSE, at which time title and risk of loss shall vest fully in PSE, unless notice of rejection is provided to Service Partner's authorized representative within five (5) business days of after such delivery.

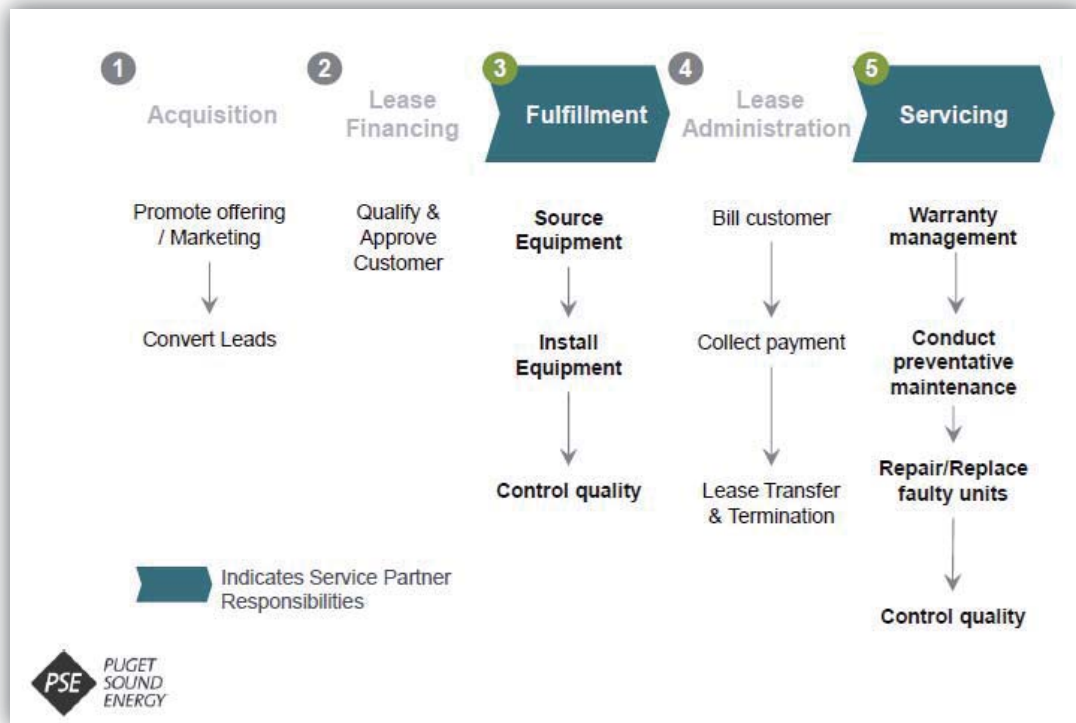
2.2. **Returns.** All returns shall be made in accordance with Schedule G, entitled Warranty Process.

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Schedule D – Hybrid Path for customer Sourcing

Overview:

PSE has designed the Lease Solutions program to be flexible to allow Service Partner optional methods for obtaining customer leads and sourcing equipment. This Schedule D describes the option for the initial contact by the customer through PSE, which will be posted for Service Partner the opportunity to fulfill the customer order. The Service Partner will respond to the customer and then provide specified products for PSE. Below are the steps for this process.



1. Reporting, Invoicing, and Payment Terms

- 1.1. **Reporting.** Service Partner shall report on a monthly and quarterly basis per Schedule B-Performance Measurement , paragraph 3.2 for payment processing and Schedule H- General Terms and Conditions paragraph 12 for audit purposes.
- 1.2. **Payment Terms.** Subject to reconciliation with the terms of this Agreement and the Order Form, including verification that the Product was delivered to Destination Site, the invoice shall be paid (“paid” being defined as “issuance of payment from PSE’s Accounts Payable Department”) net 30 days after receipt of a **valid invoice at the above referenced remit-to address.**
- 1.3. **Disputed Invoices.** Any invoice or portion thereof that is subject to a good faith dispute will not be paid; in such case, PSE will promptly notify Service Partner of any rejected invoice or portion thereof, with reasons for such rejection. The rejected costs, adjusted to the extent as mutually agreed to, shall then be re-invoiced on a separate invoice
- 1.4. **Currency.** Invoices shall call for payments in currency set forth on Order Form, and shall accurately reflect the amount(s) of the Price set forth in the Order. Changes in the Price shall only be made in accordance with specific provisions for adjustments set forth in this Agreement.

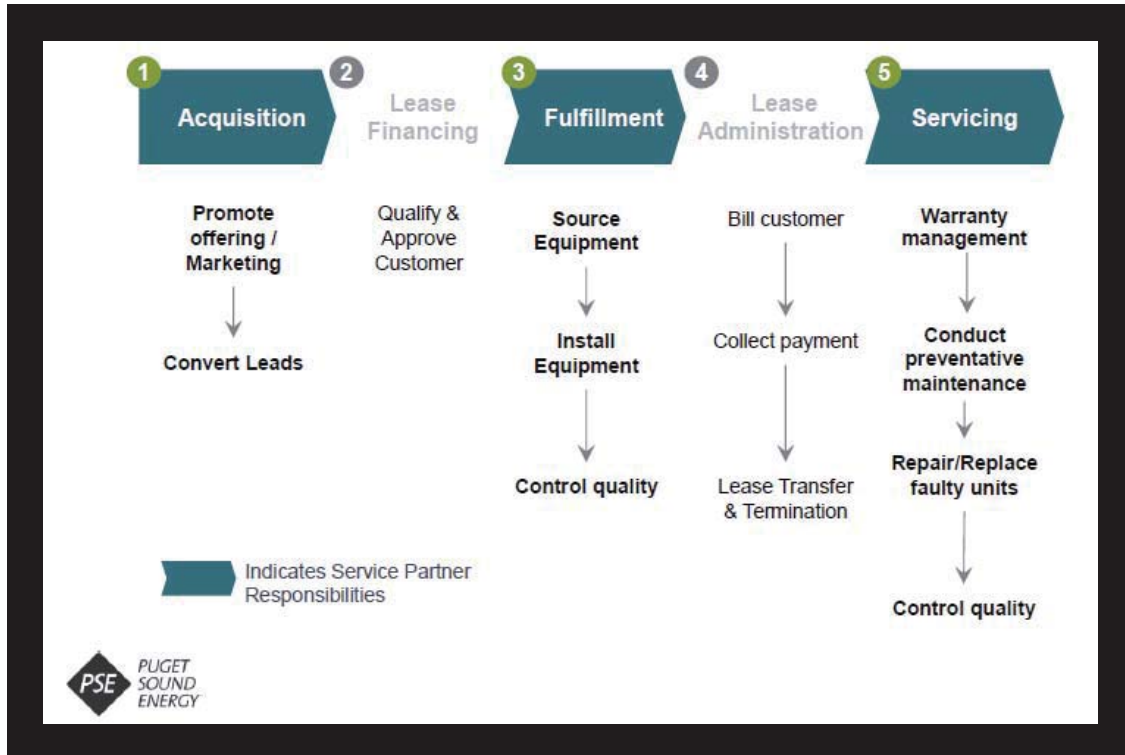
- 1.5. **Price.** The Price to be paid by PSE to Service Partner for the Product shall be specified in the Order and shall represent PSE's sole financial liability and obligation to Service Partner for the delivery of the Product and/or Deliverable. The Price shall consist of fees set forth in Schedule I – Fee Schedule.
 - 1.6. **Tax.** PSE will pay any federal, state, and local sales, use, withholding tax, duties or similar taxes imposed or based on the sale of Products under this Agreement. Such taxes will be separately stated on Service Partner's invoices and reported and paid to appropriate governmental authorities by Service Partner. At PSE's request, Service Partner will file any certificate or other document which may cause any such tax to be avoided or reduced, and cooperate with PSE in contesting any such tax or in claiming, on PSE's behalf, refunds of any such taxes paid by or on behalf of PSE. Service Partner shall be solely responsible for the payment of all taxes that apply to Service Partner's operations, such as payroll or income taxes.
2. **Title, Risk of Loss, Returns**
- 2.1. **Title.** Service Partner shall transfer to PSE good and merchantable title to the Deliverables and Product, free from all liens, encumbrances and claims of others, upon delivery of the Deliverables and Product to Destination Site and its receipt by PSE, at which time title and risk of loss shall vest fully in PSE, unless notice of rejection is provided to Service Partner's authorized representative within five (5) business days of after such delivery.
 - 2.2. **Returns.** All returns shall be made in accordance with Schedule G, entitled Warranty Process.

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Schedule E – Service Partner Path for customer Sourcing

Overview:

PSE has designed the Lease Solutions program to be flexible to allow Service Partner optional methods for obtaining customer leads and sourcing equipment. This Schedule E describes the option for the initial contact by the customer through Service Provider. Below are the steps for this process.



1. Reporting, Invoicing, and Payment Terms

- 1.1. **Reporting.** Service Partner shall report on a monthly and quarterly basis per Schedule B-Performance Measurement , paragraph 3.2 for payment processing and Schedule H- General Terms and Conditions paragraph 12 for audit purposes.
- 1.2. **Payment Terms.** Subject to reconciliation with the terms of this Agreement and the Order Form, including verification that the Product was delivered to Destination Site, the invoice shall be paid (“paid” being defined as “issuance of payment from PSE’s Accounts Payable Department”) net 30 days after receipt of a **valid invoice at the above referenced remit-to address**.
- 1.3. **Disputed Invoices.** Any invoice or portion thereof that is subject to a good faith dispute will not be paid; in such case, PSE will promptly notify Service Partner of any rejected invoice or portion thereof, with reasons for such rejection. The rejected costs, adjusted to the extent as mutually agreed to, shall then be re-invoiced on a separate invoice
- 1.4. **Currency.** Invoices shall call for payments in currency set forth on Order Form, and shall accurately reflect the amount(s) of the Price set forth in the Order. Changes in the Price shall only be made in accordance with specific provisions for adjustments set forth in this Agreement.
- 1.5. **Price.** The Price to be paid by PSE to Service Partner for the Product shall be specified in the Order and shall represent PSE's sole financial liability and obligation to Service Partner for the delivery of the Product and/or Deliverable. The Price shall consist of fees set forth in Schedule I – Fee Schedule.
- 1.6. **Tax.** PSE will pay any federal, state, and local sales, use, withholding tax, duties or similar taxes imposed or based on the sale of Products under this Agreement. Such taxes will be separately stated on Service Partner's invoices and

reported and paid to appropriate governmental authorities by Service Partner. At PSE's request, Service Partner will file any certificate or other document which may cause any such tax to be avoided or reduced, and cooperate with PSE in contesting any such tax or in claiming, on PSE's behalf, refunds of any such taxes paid by or on behalf of PSE. Service Partner shall be solely responsible for the payment of all taxes that apply to Service Partner's operations, such as payroll or income taxes.

2. **Title, Risk of Loss, Returns**

2.1. **Title.** Service Partner shall transfer to PSE good and merchantable title to the Deliverables and Product, free from all liens, encumbrances and claims of others, upon delivery of the Deliverables and Product to Destination Site and its receipt by PSE, at which time title and risk of loss shall vest fully in PSE, unless notice of rejection is provided to Service Partner's authorized representative within five (5) business days of after such delivery.

2.2. **Returns.** All returns shall be made in accordance with Schedule G, entitled Warranty Process.

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Schedule F – Maintenance and Repair

1. **Initial Contact Water Heater Maintenance and/or Repair.**
 - 1.1. **Contractor Schedules Maintenance with Customer**
 - 1.1.1. Contractor conducts scheduled standard maintenance
 - 1.1.1.1. Standard Scope of Work is included in pricing sheets
 - 1.1.2. Contractor notes and reports to PSE the need for repairs above maintenance scope
 - 1.1.2.1. PSE approves repairs
 - 1.1.2.2. PSE provides work notification for repairs
 - 1.1.2.3. Contractor coordinates with PSE Customer to perform repairs.
 - 1.1.3. Service Partner has right of refusal
 - 1.1.3.1. PSE posts to website for backup repair contractor
 - 1.1.3.2. Backup Contractor selects job
2. **Reporting, Invoicing, and Payment Terms**

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Schedule G – Warranty Process
[[[under development]]]

1. Water Heater
2. HVAC

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Schedule H – General Terms and Conditions

1. Term, Termination

- 1.1. **Term of Agreement.** This Agreement will commence on the Effective Date and will continue until the earlier of: (i) three (3) years, or ii) when one party notifies the other party of its intent to terminate by providing the other party with ninety (90) days prior written notice of such intent.
- 1.2. **Term of Order Forms.** Except for Termination for Default, if the term of an Order Form extends beyond the expiration of this Agreement, this Agreement shall be deemed to have been automatically extended for purposes of such Order Form(s) only through the remaining then-current term of the Order Form.
- 1.3. **Termination for Default.** Either party may terminate this Agreement in whole or in part by giving the defaulting party a written "Notice of Termination for Default", specifying one or more of the following causes or circumstances and the party in default does not cure such failure within ten (10) calendar days (or such longer period as the non defaulting party may authorize in writing) after receipt of notice from the non defaulting party specifying such failure:
 - a. if a party becomes insolvent or makes a general assignment for the benefit of creditors; or
 - b. if a petition under the Bankruptcy Code is filed by or against a party; or
 - c. if material and adverse developments affecting a party's business come to the attention of the non defaulting party, and it seeks but fails to receive from the party in default reasonable assurances, in writing, as to its ability and intention to perform and complete its obligations under this Agreement; or
 - d. if a party becomes involved in legal proceedings that in the non defaulting party's reasonable opinion materially interferes or will materially interfere with the non defaulting party's obligations under this Agreement; or
 - e. if the defaulting party fails to perform any of the other material provisions of this Agreement.
- 1.4. **Order Cancellation.** An Order may be cancelled follows:
 - 1.4.1. PSE shall have the right to cancel or postpone, in whole or in part, any Order, without penalty, provided that notice of such cancellation or postponement is received by Service Partner prior to shipment of the ordered Products.
 - 1.4.2. If PSE cancels an Order following shipment of the Products but prior to delivery, PSE shall pay all freight and handling charges for shipment and return shipment of such Products to Service Partner. All returns shall be made in accordance with Service Partner Return Policy.
 - 1.4.3. Notwithstanding the foregoing, any such cancellations shall be subject to restocking charges, if any, imposed by the OEM associated with the return of Product.
- 1.5. **Other Remedies.** The parties' rights and remedies set forth in this Section are not exclusive, and are in addition to any other rights and remedies provided at law, in equity, or under this Agreement.

2. Confidential Information.

- 2.1. PSE exclusively owns all PSE Confidential and PSE Information. "PSE Confidential and PSE Information" includes: any trade secrets or other confidential or proprietary information of PSE, whether of a technical, business or other nature, and any information about any PSE PSE that Service Partner obtains from PSE or any other source in connection with the Program, and which may include (without limitation), PSE names, addresses, account information, usage data, credit information, demographic information and similar. Service Partner shall keep all such information confidential, and protect all PSE Confidential and PSE Information from disclosure using the highest practical degree of care. Service Partner may not disclose PSE Confidential and PSE Information to third parties, or use PSE Confidential and PSE Information for any purpose other than to perform services pursuant to the terms of this Agreement. A breach of this Section by an employee or agent of Service Partner will be deemed a breach by Service Partner, and Service Partner agrees, at its sole expense, to take all reasonable measures (including but not limited to court proceedings) to restrain its employees or agents from prohibited or unauthorized disclosure of the PSE Confidential and PSE Information. Service Partner shall immediately notify PSE of any actual, probable or reasonably suspected disclosure or unauthorized access to the PSE Confidential and PSE Information. This section shall survive termination of this Agreement.
- 2.2. **Exclusions.** This confidentiality undertaking shall not apply to any part of the proprietary and/or Confidential Information of which the recipient party can prove that: (i) it was known to it prior to being furnished to the recipient party hereunder (as evidenced by written record predating such disclosure); (ii) it is, or becomes public knowledge through no fault or breach of the terms of this Agreement by the recipient party; (iii) is received by the recipient party from a third party in good faith and not in breach of any agreement; or (iv) is independently acquired by the recipient party as a result of work carried out by an employee of the recipient party to whom no disclosure of this proprietary and/or Confidential Information has been made.

- 2.3. **Return of Confidential Information.** Upon expiration or termination of this Agreement, each party will cease all use of the other party's Confidential Information and will promptly return, or at the other party's request, destroy all proprietary or Confidential Information in tangible form and all copies of Confidential Information. Upon request, the Receiving Party will certify in writing its compliance with the foregoing.
3. **Representations and Warranties.**
- 3.1. Service Partner hereby represents and warrants to PSE that for the term of this Agreement:
- 3.1.1. Service Partner shall perform the Services in a timely manner and with a high degree of professional skill and care using customarily accepted good and sound professional practices and procedures in the industry.
- 3.1.2. Service Partner will maintain all necessary local, state, and federal licenses and certifications that may be required in order to legally deliver the Product and Deliverables described in the Order(s). Service Partner understands and acknowledges that Service Partner is wholly responsible for ensuring compliance with all federal, state, and local laws associated with the delivery of all Services associated with this Agreement and associated SOW(s) and Order(s).
- 3.1.3. Service Partner has all rights, approvals, and/or authorizations necessary to perform the Services hereunder, and provide the Product and/or Deliverables.
- 3.1.4. Service Partner is authorized to execute this Agreement, is qualified to perform the Services, and has good title to the materials, supplies and equipment constituting the Services, free from all liens, encumbrances and claims of others.
- 3.2. **Remedy.** If a defect occurs or appears in the Deliverables or Services provided hereunder, it shall be presumed that Service Partner failed to meet such standards, and Service Partner shall promptly and at its own expense, correct or re-perform any such Services which fail to meet such standards within a reasonable time frame acceptable to PSE at no additional cost.
- 3.3. **Warranty of OEM Product.** Service Partner is a reseller of Product, not the OEM, and therefore disclaims any warranty responsibility regarding Product provided under this Agreement. Service Partner's sole responsibility shall be to forward the appropriate End User Agreements regarding such Product to PSE for review prior to Order placement and, to the extent granted by the OEM, PSE shall be the beneficiary of the OEM's warranties with respect to the Product. Service Partner is not a party to any such terms between PSE and OEM and, provided Service Partner has fulfilled its obligations to provide all applicable documentation and proper OEM Product Registration as set forth in Schedule B, Section 5, PSE agrees to look solely to the OEM for satisfaction of any and all warranty claims related to that OEM's Product and PSE shall be deemed to have made its own selection of the Products to be ordered hereunder
4. **Indemnification, Insurance and Limitation of Liability.**
- 4.1. **Service Partner General Indemnity.** Service Partner (a) hereby indemnifies, saves and holds harmless each PSE Indemnitee from all settlements, damages, expenses (including attorneys' fees) and costs arising out of a third party claim based on Service Partner's breach of this Agreement or its reseller agreements with an OEM or any failure by Service Partner to comply with applicable laws and regulations; and (b) without limitation as to amount, anything to the contrary in this Agreement notwithstanding, Service Partner hereby agrees to fully indemnify each PSE Indemnitee and assume the defense of and save and hold each PSE Indemnitee harmless from any and all liability, claims, demands, damages and costs of every kind and nature for personal injury to or death of any and all persons, including, without limitation, employees or agents of each PSE Indemnitee to the extent caused by the negligence or misconduct of Service Partner.
- 4.2. **PSE General Indemnity.** PSE (a) hereby agrees to indemnify, save and hold harmless each Service Partner Indemnitee from all settlements, damages, expenses (including attorneys' fees) and costs arising out of a third party claim based on PSE's breach of this Agreement or any failure by PSE to comply with applicable laws and regulations; and (b) without limitation as to amount, anything to the contrary in this Agreement notwithstanding, PSE hereby agrees to fully indemnify each Partner Indemnitee and assume the defense of and save and hold each Partner Indemnitee harmless from any and all liability, claims, demands, damages and costs of every kind and nature for personal injury to or death of any and all persons, including, without limitation, employees or agents of each Partner Indemnitee to the extent caused by the negligence or misconduct of PSE.
- 4.3. **Defense and Settlement Procedure.** Upon either party's receipt of notice of a claim with respect to which the other party has the obligation to defend, the defending party shall be entitled to have, and shall promptly take, sole control over the defense and settlement of such claim with counsel selected by the defending party, provided, however, that (i)

the Indemnitee shall be entitled to participate in the defense of such claim and to employ counsel at its own expense to assist in the handling of such claim, and (ii) no settlement or compromise that imposes any liability or obligation on the Indemnitee shall be made without the prior written consent of the Indemnitee, and (iii) The Indemnitee shall cooperate to the extent reasonably requested by the defending party in writing in the defense.

- 4.4. **Cooperation.** The indemnified party shall have the right, at its sole discretion, on its own behalf, to participate in such defense to whatever extent it deems necessary to protect its own interest and shall cooperate fully with the indemnifying party in any such participation. The indemnified party shall notify the other of all claims, demands, suits, actions and proceedings for which the indemnifying party has, or potentially has, indemnification responsibility under this Agreement, and shall furnish the indemnifying party all information, authority and assistance needed to enable it to defend the same. The indemnifying party's defense shall be through counsel selected by it.
- 4.5. **OEM Product Indemnification.** Service Partner is a reseller of Product, not the OEM or licensor, and therefore disclaims any indemnification responsibility regarding Product provided under this Agreement. Service Partner's sole responsibility shall be to forward the appropriate Warranty Documentation regarding such Product to PSE for review prior to Order billing and PSE shall be the beneficiary of the OEM's indemnifications with respect to the Product. Service Partner is not a party to any such terms between PSE and OEM and provided all necessary Warranty Documentation are delivered to PSE by Service Partner, PSE agrees to look solely to the OEM for satisfaction of any and all indemnification claims related to that OEM's Product.
- 4.6. **LIMITATION OF LIABILITY.** EXCEPT WITH REGARD TO CLAIMS INDEMNIFIABLE UNDER SECTIONS 4.1 AND 4.2 AND BREACH OF CONFIDENTIALITY OBLIGATIONS IN THIS SCHEDULE H, (1) NEITHER PARTY SHALL BE LIABLE TO THE OTHER PARTY FOR ANY INDIRECT, INCIDENTAL, SPECIAL, PUNITIVE, EXEMPLARY OR CONSEQUENTIAL DAMAGES ARISING IN CONNECTION WITH THIS AGREEMENT, WHETHER IN AN ACTION IN CONTRACT, TORT, STRICT LIABILITY OR NEGLIGENCE, OR OTHER ACTIONS, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGES, AND (2) NEITHER PARTY'S PER OCCURRENCE LIABILITY TO THE OTHER PARTY SHALL EXCEED THE TOTAL AMOUNT OF FEES ACTUALLY PAID OR PAYABLE BY CUSTOMER TO SERVICE PARTNER UNDER THIS AGREEMENT FOR THE YEAR PREVIOUS TO THE INCIDENT WHICH GAVE CAUSE FOR SUCH LIABILITY. CUSTOMER ACKNOWLEDGES THAT SUCH AMOUNT REFLECTS THE ALLOCATION OF RISK SET FORTH IN THIS AGREEMENT AND THAT SERVICE PARTNER WOULD NOT ENTER INTO THIS AGREEMENT WITHOUT THESE LIMITATIONS ON ITS LIABILITY.
- 4.7. **Insurance.** Throughout the term of this Agreement, Service Partner shall at its own expense, obtain and maintain the following insurance: (i) Commercial General Liability, with coverage of not less than \$1,000,000 per occurrence and \$2,000,000 in the aggregate for bodily injury and property damage; (ii) Motor Vehicle Liability insurance for owned, non-owned and hired vehicles, with limits of not less than \$1,000,000 combined single limit for bodily injury and property damage; (iii) Workers' Compensation insurance in the amount required by statute for all states in which the project or work is to be performed; and (iv) Professional Errors and Omissions Liability Insurance with limits of not less than \$1,000,000 per claim. All policies required by this Agreement shall be written by insurance carriers licensed to do business in the state in which the service is performed. The insurance afforded to PSE hereunder shall be primary for all purposes and without any right of contribution from any insurance carried by PSE. Service Partner will notify PSE in writing of any material change to its coverage as described herein. Service Partner shall furnish certificates of insurance evidencing coverage or other acceptable evidence of self-insurance to PSE upon request.
5. **Record-Keeping and Audit Rights.**
- 5.1. During the term of this Agreement and for three (3) years thereafter, Service Partner shall maintain adequate books and records relating to each item of information provided in Reports or submitted to PSE in relation to the Program.
- 5.2. Upon thirty (30) days advance notice to Service Partner, PSE or its representatives may audit the applicable records and facilities of Service Partner to verify its compliance with the terms of this Agreement. Service Partner shall provide PSE's designated audit or inspection team access to the relevant records and Service Partner's facilities.
- 5.3. Such audit by PSE may occur no more than twice in any given calendar year, and any audit will be conducted during Service Partner's normal business hours.
- 5.4. Service Partner shall promptly correct any errors and omissions disclosed by such audit, and Service Partner shall pay PSE the full amount of any overpayment revealed by the audit plus interest at the rate of one percent (1%) per month or the maximum rate permitted by applicable law from the date such payments were due under the terms of this Agreement.

- 5.5. Notwithstanding the foregoing, if such audit reveals an overpayment by Service Partner of more than five percent (5%) for the period covered by the audit report, Service Partner shall also pay all of the fees and costs associated with such audit. PSE, in its sole discretion, may terminate this Agreement immediately should any audit disclose that Service Partner has underreported the number and/or price of sales and/or installations during the audit period.
6. **Relationship of the Parties; Independent Service Partner.** Service Partner and PSE are independent contractors. Neither party has the authority to bind or make any commitment on behalf of the other party. None of either party's employees are entitled to any employment rights or benefits of the other party.
7. **Assignment and Subcontracting.**
- 7.1. Neither party may assign, subcontract, or transfer the Agreement or any part thereof without the other party's prior written consent, and any such assignment or transfer without such consent shall be null and void. However, either party will have the right to assign this Agreement and its rights and obligations under it, in whole or in part, to any present or future Affiliate or to any entity which acquires from it the operating assets to fulfill its obligations under this Agreement.
- 7.2. Notwithstanding PSE's written consent to a proposed subcontract, Service Partner shall remain responsible for all subcontracted Product and the payment therefor, and Service Partner shall be fully liable to PSE for the acts and omissions of any subcontracted entity, their agents, representatives and persons directly or indirectly employed by them as Service Partner is for the acts and omissions of Service Partner's own employees.
- 7.3. This Agreement shall be binding upon and inure to the benefit of the parties and their respective successors and assigns permitted by this Agreement.
8. **Publicity.** During or after the term of this Agreement, the parties shall not release any information (other than to its subcontractors on a need to know basis), including news releases, publicity, promotional, marketing, or other materials, media, or activities, any name, trade name, trademark, service mark, logo, or any other designation relating to the other party to this Agreement, its Affiliates, or this Agreement, without the other party's prior written approval and compliance with any terms and conditions related to such use which the owner of the mark provides to the other party. Except as specifically set out in this Agreement, nothing in this Agreement shall grant, suggest or imply any authority for one party to use the name, trademarks, service marks or trade names of the other for any purpose whatsoever.
9. **Remedies.** Unless expressly stated otherwise herein, all rights and remedies of the parties are separate and cumulative, and no one of them, whether exercised or not, shall be deemed to exclude, limit or prejudice any other rights or remedies which the parties may have.
10. **Choice of Law and Arbitration.** This contract shall be interpreted and construed in accordance with the laws of the State of Washington without regard to its conflict of laws provisions. Service Partner shall not commence or prosecute any suit, proceeding or claim to enforce the provisions of this Agreement, to recover damages for breach or default under this Agreement, or otherwise arising under or by reason of this Agreement, other than in the state and federal courts sitting in King County, Washington. Service Partner hereby irrevocably consents to the jurisdiction of the courts of the State of Washington with venue laid in King County, and of the U.S. District Court for the Western Division District of Washington in Seattle, Washington.
11. **Waiver.** The parties shall not be deemed to waive any of their rights or remedies under this Agreement unless such waiver is in writing and signed by the party to be bound. No delay or omission on the part of either party in exercising any right or remedy shall operate as a waiver of such right or remedy or any other right or remedy. A waiver of any right or remedy on any one occasion shall not be construed as a bar to or waiver of such right or remedy or any other right or remedy on any future occasion.
12. **Headings.** The headings used in this Agreement are for convenience only and shall not be used to interpret this Agreement.
13. **No Third Party Beneficiaries.** No provisions of this Agreement are intended or shall be construed to confer upon or give to any person or entity other than Service Partner and PSE (and any of their permitted assignees hereunder) any rights, remedies or other benefits under or by reason of this Agreement.

14. **Entire Agreement.** This Agreement, when executed, and the documents referenced herein encompass the entire Agreement between PSE and Service Partner with respect to the subject matter hereof and supersede all prior representations, agreements and understandings, written or oral. This Agreement may not be altered, amended or modified except by written instrument signed by the duly authorized representatives of both parties. In the event of any conflict or inconsistency between this Agreement and any schedules or exhibits hereto, the terms of this Agreement shall prevail.
15. **Invalidity.** If any provision, or portion thereof, of this Agreement is or becomes invalid under any applicable statute or rule of law, it is to be deemed stricken and the rest of the Agreement shall remain in full force and effect.
16. **Laws, Regulations and Permit.** Service Partner shall at all times comply with all applicable federal, state and local laws, ordinances, statutes, rules or regulations including but not limited to those relating to wages, taxes, hours, environmental, fair employment practices, equal opportunity, antidiscrimination, safety, fire prevention and working conditions.
17. **Force Majeure.** Notwithstanding anything else in this Agreement, and except for the obligation to pay money, no default, delay or failure to perform on the part of either party will be considered a breach of this Agreement if such default, delay or failure to perform is shown to be due to riots, civil disturbances, epidemics, war, terrorism, severe weather, fire, earthquakes, acts of God or the public enemy, or nuclear disasters. The party experiencing the delay shall be prompt in restoring normal conditions, establishing new schedules and resuming operations as soon as the event causing the failure or delay has ceased. Service Partner shall notify PSE promptly of any such delay and shall specify the effect on the Product as soon as practical.
18. **Survival.** Each provision of this Agreement reasonably intended by its terms to survive termination or expiration of this Agreement shall so survive.
19. **Orders.** The terms and conditions appearing on any Service Partner Order Form or PSE Purchase Order or clickthrough terms issued by PSE or Service Partner for this Agreement, if any, shall not change, add to, or modify the terms or conditions of the parties' agreement, as reflected in this Agreement, in any way.

Schedule I - Fee Schedule

[Under development. Product fees and consulting fees to be provided by Service Partner.]

DRAFT

Exhibit 1 – Water Heater Specifications

Under development.. Reference pricing Sheet.

DRAFT

DRAFT

Exhibit 2 – Residential HVAC Specifications

Under development.. Reference pricing Sheet.

DRAFT

Exhibit 3 – Water Heater Scope of Work

TBD. Reference pricing Sheet.

DRAFT

Puget Sound Energy Trade Ally Service Zones

Zone	City	Zip Code	Zone	City	Zip Code
Zone #01	Toledo/Mossy Rock	98591	Zone #09	Kitsap Peninsula	98329
	Toledo/Mossy Rock	98596		Kitsap Peninsula	98332
Zone #02	Centralia	98531		Kitsap Peninsula	98335
Zone #03	Chehalis	98532		Kitsap Peninsula	98388
	Chehalis	98568	Zone #10	Federal Way/Auburn	98001
Zone #04	Little Rock/Bucoda	98530		Federal Way/Auburn	98003
	Little Rock/Bucoda	98576		Federal Way/Auburn	98023
	Little Rock/Bucoda	98579	Zone #11	Auburn/Black Diamond	98002
	Little Rock/Bucoda	98589		Auburn/Black Diamond	98010
Little Rock/Bucoda	98597	Auburn/Black Diamond		98047	
Auburn/Black Diamond		Auburn/Black Diamond		98051	
Zone #05	Olympia/Lacey	98501	Auburn/Black Diamond	98092	
	Olympia/Lacey	98502	Zone #12	Enumclaw	98022
	Olympia/Lacey	98503		Zone #13A	Seattle Metro North
	Olympia/Lacey	98506	Seattle Metro North		98102
	Olympia/Lacey	98512	Seattle Metro North		98103
	Olympia/Lacey	98513	Seattle Metro North		98104
Olympia/Lacey	98516	Seattle Metro North	98105		
Zone #06	Graham/Orting	98328	Seattle Metro North		98107
	Graham/Orting	98338	Seattle Metro North		98109
	Graham/Orting	98344	Seattle Metro North		98112
	Graham/Orting	98558	Seattle Metro North		98119
	Graham/Orting	98580	Seattle Metro North		98121
Zone #07	Puyallup/Lake Tapps	98321	Seattle Metro North	98122	
	Puyallup/Lake Tapps	98323	Seattle Metro North	98174	
	Puyallup/Lake Tapps	98360	Seattle Metro North	98195	
	Puyallup/Lake Tapps	98371	Seattle Metro North	98199	
	Puyallup/Lake Tapps	98372	Zone #13B	Seattle Metro South	98106
	Puyallup/Lake Tapps	98374		Seattle Metro South	98108
	Puyallup/Lake Tapps	98375		Seattle Metro South	98116
	Puyallup/Lake Tapps	98385		Seattle Metro South	98118
	Puyallup/Lake Tapps	98390		Seattle Metro South	98126
	Puyallup/Lake Tapps	98391		Seattle Metro South	98134
	Puyallup/Lake Tapps	98396		Seattle Metro South	98136
Zone #08	Tacoma Metro	98327		Seattle Metro South	98144
	Tacoma Metro	98354		Seattle Metro South	98178
	Tacoma Metro	98373		Zone #14	Greater Eastside
	Tacoma Metro	98387	Greater Eastside		98005
	Tacoma Metro	98402	Greater Eastside		98006
	Tacoma Metro	98403	Greater Eastside		98007
	Tacoma Metro	98404	Greater Eastside		98008
	Tacoma Metro	98405	Greater Eastside		98025
	Tacoma Metro	98406	Greater Eastside		98027
	Tacoma Metro	98407	Greater Eastside		98029
	Tacoma Metro	98408	Greater Eastside		98033
	Tacoma Metro	98409	Greater Eastside		98034
	Tacoma Metro	98416	Greater Eastside		98039
	Tacoma Metro	98418	Greater Eastside		98050
	Tacoma Metro	98421	Greater Eastside	98052	
	Tacoma Metro	98422	Greater Eastside	98053	
	Tacoma Metro	98424	Greater Eastside	98074	
	Tacoma Metro	98433	Greater Eastside	98075	
	Tacoma Metro	98439	Zone #14A	Kent/Maple Valley	98030
	Tacoma Metro	98443		Kent/Maple Valley	98031
	Tacoma Metro	98444		Kent/Maple Valley	98032
	Tacoma Metro	98445		Kent/Maple Valley	98038
	Tacoma Metro	98446	Kent/Maple Valley	98042	
Tacoma Metro	98447	Zone #14B	Mercer Island	98040	
Tacoma Metro	98465		Zone #14C	Renton/Newcastle	98055
Tacoma Metro	98466	Renton/Newcastle		98056	
Tacoma Metro	98467	Renton/Newcastle		98057	
Tacoma Metro	98498	Renton/Newcastle		98058	
Tacoma Metro	98499	Renton/Newcastle		98059	

Puget Sound Energy Trade Ally Service Zones

Zone	City	Zip Code	Zone	City	Zip Code	
Zone #14D	Normandy Park-Sea Ta	98146	Zone #25	Skagit	98221	
	Normandy Park-Sea Ta	98148		Skagit	98232	
	Normandy Park-Sea Ta	98158		Skagit	98233	
	Normandy Park-Sea Ta	98166		Skagit	98235	
	Normandy Park-Sea Ta	98168		Skagit	98237	
	Normandy Park-Sea Ta	98188		Skagit	98238	
Zone #15	Snoqualmie/North Ben	98198	Skagit	98255		
	Snoqualmie/North Ben	98014	Skagit	98257		
	Snoqualmie/North Ben	98019	Skagit	98263		
	Snoqualmie/North Ben	98024	Skagit	98267		
	Snoqualmie/North Ben	98045	Skagit	98273		
Zone #16	Snoqualmie/North Ben	98065	Skagit	98274		
	Grotto/Skykomish	98224	Skagit	98283		
Zone #17	Grotto/Skykomish	98288	Skagit	98284		
	Northgate/Lake City	98115	Zone #26	Island	98236	
	Northgate/Lake City	98117		Island	98239	
	Northgate/Lake City	98125		Island	98249	
	Northgate/Lake City	98133		Island	98253	
	Northgate/Lake City	98155		Island	98260	
Northgate/Lake City	98177	Island		98277		
Zone #18	Bothell/Woodinville	98011	Zone #28	Kitsap County	98340	
	Bothell/Woodinville	98028		Kitsap County	98342	
	Bothell/Woodinville	98072		Kitsap County	98345	
	Bothell/Woodinville	98077		Kitsap County	98346	
Zone #19	Edmonds/Lynnwood	98012	Kitsap County	98364		
	Edmonds/Lynnwood	98020	Kitsap County	98370		
	Edmonds/Lynnwood	98021	Kitsap County	98392		
	Edmonds/Lynnwood	98026	Kitsap County	98383		
	Edmonds/Lynnwood	98036	Zone #28A	Kitsap County	98310	
	Edmonds/Lynnwood	98037		Kitsap County	98311	
	Edmonds/Lynnwood	98043		Kitsap County	98312	
	Edmonds/Lynnwood	98087		Kitsap County	98322	
Zone #20	Edmonds/Lynnwood	98275	Kitsap County	98337		
	Snohomish/Monroe	98205	Kitsap County	98353		
	Snohomish/Monroe	98258	Kitsap County	98359		
	Snohomish/Monroe	98272	Kitsap County	98366		
	Snohomish/Monroe	98290	Kitsap County	98367		
Zone #21	Snohomish/Monroe	98296	Kitsap County	98380		
	Gold Bar/Sultan	98251	Kitsap County	98386		
	Gold Bar/Sultan	98252	Kitsap County	98393		
Zone #22	Gold Bar/Sultan	98294	Zone #29	Kittitas	98926	
	Everett/Marysville	98201		Kittitas	98934	
	Everett/Marysville	98203		Kittitas	98946	
	Zone #23	Everett/Marysville	98204	Zone #29A	Upper Kittitas	98068
		Everett/Marysville	98208		Upper Kittitas	98922
		Everett/Marysville	98270		Upper Kittitas	98925
Everett/Marysville		98271	Upper Kittitas		98940	
Zone #24	Stanwood/Arlington	98223	Upper Kittitas	98941		
	Stanwood/Arlington	98282	Upper Kittitas	98943		
	Stanwood/Arlington	98292	Zone #30	Vashon Island	98013	
Zone #25	Whatcom	98220		Vashon Island	98070	
	Whatcom	98225	Zone #31	Bainbridge Island	98110	
	Whatcom	98226				
	Whatcom	98229				
	Whatcom	98230				
	Whatcom	98240				
	Whatcom	98244				
	Whatcom	98247				
	Whatcom	98248				
	Whatcom	98262				
	Whatcom	98264				
	Whatcom	98266				
	Whatcom	98276				
	Whatcom	98281				
	Whatcom	98295				



MUTUAL NONDISCLOSURE AGREEMENT

Puget Sound Energy, Inc. a Washington corporation with offices at 10885 NE 4th St., Bellevue, WA ("PSE") and the "Other Party" identified on the signature page below are considering a business transaction (the "Transaction").

The parties, intending to be legally bound, agree that:

I. Confidentiality.

1. In connection with the Transaction, each party (a "Disclosing Party") is prepared to make available to the other party (a "Receiving Party") certain Confidential Information regarding the Disclosing Party's business.

2. "Confidential Information" means: (i) any and all information with respect to the status of or the terms of the Transaction, and (ii) any trade secrets or other confidential or proprietary information of the Disclosing Party, whether of a technical, business or other nature (including, without limitation, the relationship between the parties, and information relating to the Disclosing Party's technology, software, products, services, designs, methodologies, know how, business plans, finances, marketing plans, customers, employees, prospects or other affairs).

3. Receiving Party may not disclose Confidential Information to third parties; provided, however, that notwithstanding the foregoing, Receiving Party may disclose Confidential Information to its employees, consultants, advisors, or other agents (its "Representatives") only to the extent necessary for such Representatives to assist the Receiving Party in evaluating the Transaction, provided that such Representatives agree to keep such Confidential Information confidential in accordance with this Agreement.

4. Receiving Party will not use or allow others to use Confidential Information for any purpose other than evaluating the Transaction.

5. At Disclosing Party's request, Receiving Party will return all materials furnished by Disclosing Party that contain Confidential Information and will destroy or deliver to Disclosing Party any other materials containing Confidential Information, including materials prepared by Receiving Party, unless such Confidential Information is required to be retained by the Receiving Party to comply with applicable law, regulatory requirements or internal document retention policies.

backup media, then such information shall in all respects remain subject to the terms and conditions of this Agreement.

6. The provisions of this Part I shall not apply to Confidential Information that: (a) is or becomes publicly available through no fault of Receiving Party; (b) is or has been received in good faith by Receiving Party without restriction on use or disclosure from a third party having no obligation of confidentiality to Disclosing Party; or (c) is or has been independently developed by Receiving Party without reference to Confidential Information received from Disclosing Party, as evidenced by Receiving Party's written records.

7. The fact that portions of Confidential Information may be publicly available or otherwise not subject to this Agreement will not affect Receiving Party's obligations with respect to the remaining portion.

8. If Receiving Party is required by judicial or administrative process to disclose Confidential Information, Receiving Party shall promptly notify Disclosing Party and allow Disclosing Party a reasonable time to oppose such process. If disclosure is nonetheless required, Receiving Party may disclose only the Confidential Information that, in the written opinion of counsel acceptable to Disclosing Party, Receiving Party is legally required to disclose.

9. This Agreement will not apply to information disclosed to Receiving Party after Receiving Party receives written notice from Disclosing Party that further disclosures will not be treated as confidential.

10. In providing Confidential Information pursuant to this Agreement, Disclosing Party makes no representation, either express or implied, as to adequacy, sufficiency, or freedom from fault of such Confidential Information and incurs no responsibility nor obligation whatsoever by reason thereof, and the furnishing of such Confidential Information will not convey any rights or license with respect to such Confidential Information.

II. No Commitment to Enter Into Transaction. The parties acknowledge that nothing in this Agreement is intended to create or constitute any agency or partnership among the parties, or any legally binding obligation for either party to enter into, or negotiate to enter into, the Transaction.

III. Miscellaneous.

1. This Agreement shall continue in full force and effect for two (2) years from the Effective Date, unless terminated earlier or extended by mutual agreement of the parties.

2. In the event of a default under this Agreement, the non-breaching party will be entitled to injunctive relief, without posting bond, in addition to any other available remedies, including damages. In any litigation concerning this Agreement, the prevailing party will be entitled to recover all reasonable expenses of litigation, including reasonable attorney fees at trial and on any appeal.

3. Any failure by a party to enforce another party's strict performance of any provision of this Agreement will not constitute a waiver of its right to subsequently enforce such provision or any other provision of this Agreement.

4. This Agreement will be governed by and construed and enforced in accordance with the internal laws of the state of Washington, without regard to contrary principles of conflicts of law. The federal and state courts within the State of Washington shall have exclusive jurisdiction to adjudicate any dispute arising out of and relating to this Agreement. Venue for purposes of any litigation arising under this Agreement will be in King County, Washington.

5. All additions or modifications to this Agreement must be in writing and executed by all parties.

EFFECTIVE DATE: January 19, 2016

Puget Sound Energy, Inc.

Authorized Signature: [Handwritten Signature]

Name: Jill R. Larson, MBA, CPSM

Title: Senior Buyer

Date: January 19, 2016

Other Party: _____

Authorized Signature: _____

Name: _____

Title: _____

Date: _____

BID SHEET INSTRUCTIONS

- * There are six tabs included in this bid sheet, each representing a separate product category.
- * Each tab includes details outlining what should and should not be included in each pricing category
- * All pricing should be entered as a flat rate, absent of taxes, unless noted otherwise
- * All input cells, defined below, must be completed for each product a proposer is submitting to manage

Input cells

Orange Cells - only these input cells should be edited

Application	Category	Type	Fuel	Capacity (kBtu/hr)	AFUE Efficiency (%)	Blower Motor	Combustion Stages	Product Certification	Standard Installation (Flat Rate)	Standard Maintenance - Every Two (2) Years (Flat Rate)	Repair & Service (Hourly labor rate)
Residential	HVAC	Forced Air Furnace	Gas	40	> 80	High Efficiency	Single				
Residential	HVAC	Forced Air Furnace	Gas	60	> 80	High Efficiency	Single				
Residential	HVAC	Forced Air Furnace	Gas	40	> 80	High Efficiency	Two				
Residential	HVAC	Forced Air Furnace	Gas	60	> 80	High Efficiency	Two				
Residential	HVAC	Forced Air Furnace	Gas	40	> 95	High Efficiency	Single	AHRI or ENERGY STAR Certified			
Residential	HVAC	Forced Air Furnace	Gas	60	> 95	High Efficiency	Single	AHRI or ENERGY STAR Certified			
Residential	HVAC	Forced Air Furnace	Gas	40	> 95	High Efficiency	Two	AHRI or ENERGY STAR Certified			
Residential	HVAC	Forced Air Furnace	Gas	60	> 95	High Efficiency	Two	AHRI or ENERGY STAR Certified			
STANDARD INSTALLATION	Cost Component	Site Check	<p>1. Perform leak loss & Manual J calculations</p> <p>2. Take material measurement</p> <p>3. Verify installation will meet code (venting, combustion air, gas pipe, clearances, etc.)</p> <p>4. Draft work order for installation</p> <p>5. Schedule installation date</p> <p>6. Secure customer signature on PSE form(s)</p> <p>1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable</p> <p>1. Conduct duct blaster</p> <p>2. Shut off power</p> <p>3. Shut off gas line and disconnect</p> <p>4. Disconnect 115 v and 24 V wiring</p> <p>5. Remove and dispose of old furnace</p> <p>6. Design and build transitions</p> <p>7. Cut sheet metal to transition points</p> <p>8. Install furnace</p> <p>9. Install new sheet metal, filter channel and standard filtration system</p> <p>10. Seal internal and external joints</p> <p>11. Install and/or reconnect venting</p> <p>12. Hook up, inspect and test fuel line</p> <p>13. Hook up, 115v wiring from J-box to furnace</p> <p>14. Install fan switch or connect to t-stat</p> <p>15. Hook up internal 24 v controls and t-stat</p> <p>16. Fire off unit, check combustion and firing rate</p> <p>17. Set fan speed, check all controls, run through heating cycle</p> <p>18. Check all safety operations</p> <p>19. Clean site</p> <p>20. Review T-stat settings with customer to optimize their goals/system performance</p> <p>21. Discuss installation and operation with homeowner</p>								
STANDARD MAINTENANCE	Cost Component	Standard Maintenance	<p>1. Inspect, clean and lubricate blower assembly (includes blower housing, blower wheel and motor)</p> <p>2. Check combustion blower housing for lint and debris and clean as necessary</p> <p>3. Inspect, drain pan and condensate drain lines. Clean as needed</p> <p>4. Test condensate pump</p> <p>5. Check gas pressure and adjust as necessary</p> <p>6. Inspect for gas leaks</p> <p>7. Inspect burner assembly—clean and adjust as needed</p> <p>8. Inspect ignition system and safety controls—clean and adjust as needed</p> <p>9. Inspect heat exchanger or heating elements</p> <p>10. Inspect flue system—check for proper attachment to the furnace, any disconnected sections, and for signs of corrosion.</p> <p>11. Check Amp draw</p> <p>12. Inspect control box, associated controls, wiring and connections</p> <p>13. Clean or replace air filters</p> <p>14. Fire unit from T-stat and review settings with customer to optimize their goals/system performance</p> <p>15. Check temperature rise</p> <p>16. Check all safety operations</p> <p>17. Discuss service with homeowner</p>								

Application	Category	Type	Fuel	Capacity (tons)	HSPF	SEER	Blower Motor	Product Certification	Standard Installation (Flat Rate)	Standard Maintenance-Every Two (2) Years (Flat Rate)	Repair & Service (Hourly labor rate)
Residential	HVAC	Heat Pump	Electric	2	>9	>14	High Efficiency Blower	AHRI Certified			
Residential	HVAC	Heat Pump	Electric	2.5	>9	>14	High Efficiency Blower	AHRI Certified			
Residential	HVAC	Heat Pump	Electric	3	>9	>14	High Efficiency Blower	AHRI Certified			

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Perform heat loss & Manual J calculations 2. Take material measurement 3. Verify installation will meet code 4. Draft work order for installation 5. Schedule installation date 6. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical & electrical) and associated labor and inspection time – where applicable 1. Conduct duct blaster 2. Shut off power 3. Disconnect wiring 4. Remove and dispose of old refrigerant and lines 5. Remove and dispose of old air handler and outdoor unit 6. Design and build transitions and fittings 7. Cut sheet metal to transition points 8. Install new air handler and indoor coil 9. Install new sheet metal, filter channel and standard filtration system 10. Seal internal and external joints 11. Install new outdoor unit 12. Install new R410A compatible refrigerant lines & refrigerant 13. Complete all electrical connections 14. Charge, inspect and test refrigerant lines 15. Check all controls, run through heating and cooling cycles 16. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 17. Check all safety operations 18. Cleanup 19. Discuss installation and operation with homeowner 	N/A
	Standard Installation		<ol style="list-style-type: none"> 1. Craw space or attic installation 2. Relocation of indoor air handler 3. Relocating outdoor unit 4. Pad for outdoor unit and ground prep 5. Relocating refrigerant line 6. Additional supply or return runs 7. Increasing duct size 8. Code upgrades <ol style="list-style-type: none"> a. Outdoor thermostat & lockout b. Condensate/ Condensate pump 9. T-stat relocation or rewiring installs 10. Installing new or smart T-stat 11. Advanced air filtration system 12. Sound Blanket for outdoor coil 13. Hard Start kit 14. Whole house duct sealing
STANDARD MAINTENANCE	Indoor Unit	<ol style="list-style-type: none"> 1. Inspect and clean blower assembly (includes blower housing, blower wheel and motor) 2. Inspect evaporator coil, drain pan and condensate drain lines. Clean as needed 3. Test condensate pump 4. Inspect refrigerant lines and connection 5. Check Amp draw 6. Inspect control box, associated controls, wiring and connections 7. Clean or replace air filters 8. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 9. Check all safety operations 	N/A
	Standard Maintenance	<ol style="list-style-type: none"> 1. Inspect unit for proper refrigerant level and adjust if necessary 2. Clean dirt, leaves and debris from inside cabinet 3. Inspect base pan for restricted drain openings - remove obstructions as necessary 4. Inspect coil and cabinet - clean as needed 5. Inspect fan motor and fan blades for wear and damage - lubricate as needed 6. Check outdoor temperature sensors 7. Inspect control box, associated controls/accessories, wiring and connections. Controls may include contactors, relays, circuit boards, capacitors, sump heat and other accessories. All control box and electrical parts should be checked for wear or damage. 8. Inspect compressor and associated tubing for damage 9. Check all safety operations 10. Discuss service with homeowner 	

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Venting	Product Certification	Standard Installation (Flat Rate)	Standard Maintenance - Years six (6) and Fifteen (15) (Flat Rate)	Repair & Service (Hourly labor rate)
Residential	Water Heat	Tank Style	Gas	40	≥ 0.65	Standard	ENERGY STAR Certified and Meets 2015 NAECA Standards			
Residential	Water Heat	Tank Style	Gas	50	≥ 0.65	Standard	ENERGY STAR Certified and Meets 2015 NAECA Standards			
Residential	Water Heat	Tank Style	Gas	40	≥ 0.65	Direct Vent	ENERGY STAR Certified and Meets 2015 NAECA Standards			
Residential	Water Heat	Tank Style	Gas	50	≥ 0.65	Direct Vent	ENERGY STAR Certified and Meets 2015 NAECA Standards			

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 1. Shut off power 2. Shut off gas line and disconnect 3. Check inlet water pressure 4. Disconnect wiring 5. Remove and dispose of old water heater 6. Install tank stand or plumb to the floor (do not include cost of stand) <ul style="list-style-type: none"> o Include 2 new water flex, 1 gas flex & sediment trap 7. Install new water heater 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank 12. Fire off unit, check combustion and firing rate <ul style="list-style-type: none"> o Check combustion of furnace if common venting used 13. Set temperature and check all controls 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with homeowner 	N/A
	Standard Installation		<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open loop systems 7. Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier Post o Water Alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Relighting other appliances if fuel line removed past G valve
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Inspect ignition system and safety controls—clean and adjust as needed 2. Inspect burner assembly—clean and adjust as needed 3. Inspect flue system—check for proper attachment to the water heater, any dislocated sections, and for signs of corrosion 4. Check gas pressure and adjust as necessary 5. Inspect for gas leaks 6. Test (TPR) temperature-pressure-release valve 7. Check the anode rod 8. Drain the tank and flush out sediment 9. Fill tank 10. Check temperature and adjust to 120 degrees as necessary 11. Inspect control box, associated controls, wiring and connections 12. Inspect for water leaks 13. Check all safety operations 14. Clean site 15. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Product Certification	Product Capabilities	Standard Installation (Flat Rate)	Standard Maintenance - Years six (6) and Fifteen (15) (Flat Rate)
Residential	Water Heat	Tank Style	Electric	40	> 0.95	ENERGY STAR Certified and 2015 NAECA Standards			
Residential	Water Heat	Tank Style	Electric	50	> 0.95	ENERGY STAR Certified and 2015 NAECA Standards			
Residential	Water Heat	Tank Style	Electric	40	> 0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CEA-2045*** or proprietary Modular Communications Interface (MCI) socket		
Residential	Water Heat	Tank Style	Electric	50	> 0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CEA-2045*** or proprietary Modular Communications Interface (MCI) socket		
Residential	Water Heat	Heat Pump	Electric	50	> 1.8*	NEEA Northern Climate Specification approved and 2015 NAECA Standards			
Residential	Water Heat	Heat Pump	Electric	50	> 1.8*	NEEA Northern Climate Specification approved and 2015 NAECA Standards	ANSI/CEA-2045*** or proprietary Modular Communications Interface (MCI) socket		

* Northern Climate Energy Factor
 ** <http://neea.org/docs/default-source/northern-climate-heat-pump-water-heater-specification/qualified-products-list.pdf>
 *** CEA-2045 socket

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Install tank stand or plumb to the floor (do not include cost of stand) 6. Install new water heater o Include 2 new water flex 7. Connect wiring with 2 new wire nuts 8. Fill Tank 9. Set temperature and check all controls 10. Check all safety operations 11. Clean site 12. Discuss installation and operation with homeowner 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Drain the tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with homeowner 	<ol style="list-style-type: none"> 1. Crawli space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Open loop systems 5. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier Post o Water Alarm o Relief line
STANDARD MAINTENANCE	Standard Maintenance		N/A

Application	Category	Type	Fuel	Size (gal.)	Capacity (kBtu/hr)	Energy Factor	Thermal Efficiency	Venting	Product Certification	Standard Installation (Flat Rate)	Standard Maintenance-Annual (Flat Rate)	Repair & Service (Hourly labor rate)
Commercial	Water Heat	Tank Style	Gas	50	≥ .67	Standard	ENERGY STAR Certified					
Commercial	Water Heat	Tank Style	Gas	50	≥ .67	Direct Vent	ENERGY STAR Certified					
Commercial	Water Heat	Tank Style	Gas	75	upto.199	Standard	≥.95	Standard				
Commercial	Water Heat	Tank Style	Gas	75	upto.199	Direct Vent	≥.95	Direct Vent				

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> Verify installation will meet code (venting, combustion air, gas pipe, clearances, etc.) Draft work order for installation Schedule installation date Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 	N/A
	Standard Installation	<ol style="list-style-type: none"> Shut off power Shut off gas line and disconnect Check inlet water pressure Disconnect wiring Remove and dispose of old water heater Install tank stand or plumb to the floor (do not include cost of stand) Install new water heater <ul style="list-style-type: none"> o Include 2 new water flex, 1 gas flex & sediment trap Install and/or reconnect venting Hook up, inspect and test fuel line Connect wiring Fill Tank <ul style="list-style-type: none"> o Fire off unit, check combustion and firing rate o Check combustion of furnace if common venting used Set temperature and check all controls Check all safety operations Clean site Discuss installation and operation with owner 	<ol style="list-style-type: none"> Crawl space or attic installation Relocation of water heater Relocation of plumbing lines Relocating gas line Relocating venting Open loop systems Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier post o Water alarm o Relief line Extending gas lines for additional appliances Priming and painting gas line Relighting other appliances if fuel line removed past G valve
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> Inspect ignition system and safety controls—clean and adjust as needed Inspect burner assembly—clean and adjust as needed Inspect flue system—check for proper attachment to the water heater, any dislocated sections, and for signs of corrosion Check gas pressure and adjust as necessary Inspect for gas leaks Test (TPR) temperature-pressure-release valve Check the anode rod Drain the tank and flush out sediment Fill tank Check temperature and adjust to 120 degrees as necessary Inspect control box, associated controls, wiring and connections Inspect for water leaks Check all safety operations Clean site Discuss service with owner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Thermal Efficiency	Product Capabilities	Standard Installation (Flat Rate)	Standard Maintenance - Annual (Flat Rate)	Repair & Service (Hourly labor rate)
Commercial	Water Heat	Tank Style	Electric	50	> 0.95		ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket			
Commercial	Water Heat	Tank Style	Electric	75		> 97	ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket			

* CEA-2045 socket

Costs Category	Components	What should be included in flat rates	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Verify installation will meet code 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Install tank stand or plumb to the floor (do not include cost of stand) 6. Install new water heater <ul style="list-style-type: none"> o include 2 new water flex 7. Connect wiring with 2 new wire nuts 8. Fill tank 9. Set temperature and check all controls 10. Check all safety operations 11. Clean site 12. Discuss installation and operation with owner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Open loop systems 5. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier post o Water Alarm o Relief line
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Drain the tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with owner 	

BID SHEET INSTRUCTIONS

- * There are six tabs included in this bid sheet, each representing a separate product category.
- * Each tab includes details outlining what should and should not be included in each pricing category
- * All pricing should be entered as a flat rate, absent of taxes, unless noted otherwise
- * All input cells, defined below, must be completed for each product a proposer is submitting to manage

Input cells

Orange Cells - only these input cells should be edited

Application	Category	Type	Fuel	Capacity (Btu/hr)	AFUE Efficiency (%)	Blower Motor	Combustion Stages	Product Certification	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Maintenance - Every Two (2) Years (Flat Rate)	Repair & Service (Hourly labor rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	HVAC	Forced Air Furnace	Gas	40	> 80	High Efficiency	Single								
Residential	HVAC	Forced Air Furnace	Gas	60	> 80	High Efficiency	Single								
Residential	HVAC	Forced Air Furnace	Gas	40	> 80	High Efficiency	Two								
Residential	HVAC	Forced Air Furnace	Gas	60	> 80	High Efficiency	Two								
Residential	HVAC	Forced Air Furnace	Gas	40	> 95	High Efficiency	Single	AHRI or ENERGY STAR Certified							
Residential	HVAC	Forced Air Furnace	Gas	60	> 95	High Efficiency	Single	AHRI or ENERGY STAR Certified							
Residential	HVAC	Forced Air Furnace	Gas	40	> 95	High Efficiency	Two	AHRI or ENERGY STAR Certified							
Residential	HVAC	Forced Air Furnace	Gas	60	> 95	High Efficiency	Two	AHRI or ENERGY STAR Certified							

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> Perform heat loss & Manual J calculations Take material measurement Verify installation will meet code (venting, combustion air, gas pipe, clearances, etc.) Draft work order for installation Schedule installation date Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable Conduct duct blaster Shut off power Disconnect 115 v and 24 V wiring Remove and dispose of old furnace Design and build transitions Cut sheet metal to transition points Install furnace Install/replace metal filter channel and standard filtration system Seal internal and external joints Install and/or reconnect venting Hook up, inspect and test fuel line Hook up, 115v wiring from -box to furnace Install fan switch or connect to t-stat Hook up internal 24 v controls and t-stat Fire off unit, check combustion and firing rate Check combustion of water heater, if common venting used) Set fan speed, check all controls, run through heating cycle Check all safety operations Clean site Review T-stat settings with customer to optimize their goals/system performance Discuss installation and operation with homeowner 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Craw space or attic installation 2. Relocating of furnace 3. Relocating gas line 4. Relocating venting over 5. Additional supply or return runs 6. Changing duct size 7. Code upgrades 8. Adding combustion air 9. B vent 10. PVC/Condensate/ Condensate pump 11. Increasing gas line size per code 12. Securing gas line to code 13. Extending gas lines for additional appliances 14. Priming and painting gas line 15. T-stat relocation or rewiring installs 16. Installing new or smart t-stat 17. Advanced air filtration system 18. Controls add-ons (temperature/humidity sensor) 19. Cutting sheetrock 20. Reighting other appliances if fuel line removed past G valve 21. Whole house duct sealing 22. Air conditioning 	
EQUIPMENT	Equipment	<ol style="list-style-type: none"> Source Equipment to meet above specification Warehouse & inventory management Provide warranty management BTU rating on the pricing sheet indicates input BTU ECM motors or X-13 motors will considered high-efficiency for pricing purposes Inspect, clean and lubricate blower assembly (includes blower housing, blower wheel and motor) Check combustion blower housing for lint and debris and clean as necessary Inspect, drain pan and condensate drain lines. Clean as needed Test condensate pump Check gas pressure and adjust as necessary Inspect for gas leaks Inspect burner assembly—clean and adjust as needed Inspect ignition system and safety controls—clean and adjust as needed Inspect heat exchanger or heating elements Inspect flue system—check for proper attachment to the furnace, any dislocated sections, and for signs of corrosion. Check Armp draw Inspect control box, associated controls, wiring and connections Clean or replace air filters Fire unit from T-stat and review settings with customer to optimize their goals/system performance Check temperatures, rise Check all safety operations Discuss service with homeowner 	
STANDARD MAINTENANCE	Standard Maintenance		N/A

Application	Category	Type	Fuel	Capacity (tons)	HSPF	SEER	Blower Motor	Product Certification	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every Two (2) Years (Flat Rate)	Repair & Service (Hourly labor rate)	Model	Warranty Term (Years)
Residential	HVAC	Heat Pump	Electric	2	> 9	> 14	High Efficiency Blower	AHRI Certified						
Residential	HVAC	Heat Pump	Electric	2.5	> 9	> 14	High Efficiency Blower	AHRI Certified						
Residential	HVAC	Heat Pump	Electric	3	> 9	> 14	High Efficiency Blower	AHRI Certified						

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Perform heat loss & Manual J calculations 2. Take material measurement 3. Verify installation will meet code 4. Draft work order for installation 5. Schedule installation date 6. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical & electrical) and associated labor and inspection time - where applicable 1. Conduct duct blaster 2. Shut off power 3. Disconnect wiring 4. Remove and dispose of old refrigerant and lines 5. Remove and dispose of old air handler and outdoor unit 6. Design and build transitions and fittings 7. Cut sheet metal to transition points 8. Install new air handler and indoor coil 9. Install new sheet metal, filter channel and standard filtration system 10. Seal internal and external joints 11. Install new outdoor unit 12. Install new R410A compatible refrigerant lines & refrigerant 13. Complete all electrical connections 14. Charge, inspect and test refrigerant lines 15. Check all controls, run through heating and cooling cycles 16. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 17. Check all safety operations 18. Cleanup 19. Discuss installation and operation with homeowner 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 4. Include outdoor compressor, indoor coil, air-handler, new R410A compatible refrigerant lines and refrigerant in pricing 	<ol style="list-style-type: none"> 1. Conal space or attic installation 2. Relocation of indoor air handler 3. Relocating outdoor unit 4. Pad for outdoor unit and ground prep 5. Relocating refrigerant line 6. Additional supply or return runs 7. Increasing duct size 8. Code upgrades <ul style="list-style-type: none"> o Outdoor thermostat & lockout o Condensate/ Condensate pump 9. T-stat relocation or rewiring installs 10. Installing new or smart t-stat 11. Advanced air filtration system 12. Sound Blanket for outdoor coil 13. Hard Start Kit 14. Whole house duct sealing
EQUIPMENT	Equipment	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 4. Include outdoor compressor, indoor coil, air-handler, new R410A compatible refrigerant lines and refrigerant in pricing 	<ol style="list-style-type: none"> 1. Note above
STANDARD MAINTENANCE	Standard Maintenance	<p>Indoor Unit</p> <ol style="list-style-type: none"> 1. Inspect and clean blower assembly (includes blower housing, blower wheel and motor) 2. Inspect evaporator coil, drain pan and condensate drain lines. Clean as needed 3. Test condensate pump 4. Inspect refrigerant lines and connection 5. Check Amp draw 6. Inspect control box, associated controls, wiring and connections 7. Clean or replace air filters 8. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 9. Check all safety operations <p>Outdoor Unit</p> <ol style="list-style-type: none"> 1. Inspect unit for proper refrigerant level and adjust if necessary 2. Clean dirt, leaves and debris from inside cabinet 3. Inspect base pan for restricted drain openings - remove obstructions as necessary 4. Inspect coil and cabinet - clean as needed 5. Inspect fan motor and fan blades for wear and damage - lubricate as needed 6. Check outdoor temperature sensors 7. Inspect control box, associated controls, wiring and connections. Controls may include contactors, relays, circuit boards, capacitors, sump heat and other accessories. All control box and electrical parts should be checked for wear or damage. 8. Inspect compressor and associated tubing for damage 9. Check all safety operations 10. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Venting	Product Certification	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Years six (6) and Fifteen (15) (Flat Rate)	Repair & Service (Hourly labor rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	Water Heat	Tank Style	Gas	40	>0.65	Standard	ENERGY STAR Certified and Meets 2015 NAECA Standards							
Residential	Water Heat	Tank Style	Gas	50	>0.65	Standard	ENERGY STAR Certified and Meets 2015 NAECA Standards							
Residential	Water Heat	Tank Style	Gas	40	>0.65	Direct Vent	ENERGY STAR Certified and Meets 2015 NAECA Standards							
Residential	Water Heat	Tank Style	Gas	50	>0.65	Direct Vent	ENERGY STAR Certified and Meets 2015 NAECA Standards							

Cost Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Permit/Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time—where applicable 2. Shut off power 3. Check inlet gas line and disconnect 4. Disconnect wiring 5. Remove and dispose of old water heater 6. Install tank stand or plumb to the floor (do not include cost of stand) 7. Install new water heater <ul style="list-style-type: none"> o Include 2 new water flex, 1 gas flex, & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank 12. Fire off unit, check combustion and firing rate <ul style="list-style-type: none"> o Check combustion of furnace if common venting used 13. Set temperature and check all controls 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with homeowner 	N/A
	Equipment	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	<ol style="list-style-type: none"> 1. Craw space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open loop systems <ul style="list-style-type: none"> o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code 7. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier Post o Water Alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Reighting other appliances if fuel line removed past C value
STANDARD MAINTENANCE	Equipment	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	N/A
	Standard Maintenance	<ol style="list-style-type: none"> 1. Inspect ignition system and safety controls—clean and adjust as needed 2. Inspect burner assembly—clean and adjust as needed 3. Inspect flue system—check for proper attachment to the water heater, any disconnected sections, and for signs of corrosion 4. Check gas pressure and adjust as necessary 5. Inspect for gas leaks 6. Test (TPR) temperature-pressure release valve 7. Check the anode rod 8. Flush the tank and flush out sediment 9. Fill tank with water 10. Check temperature and adjust to 120 degrees as necessary 11. Inspect control box, associated controls, wiring and connections 12. Inspect for water leaks 13. Check all safety operations 14. Clean site 15. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Product Certification	Product Capabilities	Standard Installation (flat rate)	Equipment Cost (flat rate)	Standard Maintenance - Years six (6) and fifteen (15) (flat rate)	Repair & Service (hourly labor rate)	Make (brand)	Model	Warranty Term (years)
Residential	Water Heat	Tank Style	Electric	40	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards								
Residential	Water Heat	Tank Style	Electric	50	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards								
Residential	Water Heat	Tank Style	Electric	40	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CEA-2005*** or proprietary Modular Communications Interface (MCI) socket							
Residential	Water Heat	Tank Style	Electric	50	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CEA-2005*** or proprietary Modular Communications Interface (MCI) socket							
Residential	Water Heat	Heat Pump	Electric	50	≥ 1.18*	Specification approved and 2015 NEFA Northern Climate	ANSI/CEA-2005*** or proprietary Modular Communications Interface (MCI) socket							
Residential	Water Heat	Heat Pump	Electric	50	≥ 1.18**	Specification approved and 2015 NAECA Standards								

* Northern Climate Energy Factor
<http://www.nce.com/docs/default-source/northern-climate-hot-water-heater-specification/qualified-products-list.pdf>
 ** CEA 2005 socket

Cost Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Permit/Handling	1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Install tank stand or plumb to the floor (do not include cost of stand) 6. Install new water heater 7. Connect wiring with 2 new wire nuts 8. Fill tank 9. Check temperature and check all controls 10. Check all safety operations 11. Clean site 12. Discuss installation and operation with homeowner	N/A
	Standard Installation		1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Open loop systems 5. Code upgrades 6. Expansion tank 7. Drip pan 8. Antiquates straps & 2x4 bracing 9. Water alarm 10. Relief line
EQUIPMENT	Equipment	1. Source equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management	1. Note above
STANDARD MAINTENANCE	Standard Maintenance	1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Drain the tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with homeowner	N/A

Application	Category	Type	Fuel	Size (gal.)	Capacity (klb/hr)	Energy Factor	Thermal Efficiency	Venting	Product Certification	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance-Annual (Flat Rate)	Repair & Service (Hourly/Labor rate)	Make (Brand)	Model	Warranty Term (Years)
Commercial	Water Heat	Tank Style	Gas	50		> 67		Standard	ENERGY STAR Certified							
Commercial	Water Heat	Tank Style	Gas	50		> 67		Direct Vent	ENERGY STAR Certified							
Commercial	Water Heat	Tank Style	Gas	75	upto 199		> 95	Standard								
Commercial	Water Heat	Tank Style	Gas	75	upto 199		> 95	Direct Vent								

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	1. Verify installation will meet code (venting, combustion air, gas pipe, clearances, etc.) 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s)	N/A
	Permit Handling	1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable	N/A
	Standard Installation	1. Shut off power 2. Shut off gas line and disconnect 3. Check inlet water pressure 4. Disconnect wiring 5. Remove and dispose of old water heater 6. Install tank stand or plumb to the floor (do not include cost of stand) 7. Install new water heater o Include 2 new water flex, 1 gas flex & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank 12. Fire off unit, check combustion and firing rate o Check combustion of furnace if common venting used 13. Set temperature and check all controls 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with owner	1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open loop systems 7. Code upgrades o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier post o Water alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Relighting other appliances, if fuel line removed past G valve
EQUIPMENT	Equipment	1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management	
STANDARD MAINTENANCE	Standard Maintenance	1. Inspect ignition system and safety controls—clean and adjust as needed 2. Inspect burner assembly—clean and adjust as needed 3. Inspect flue system—check for proper attachment to the water heater, any disconnected sections, and for signs of corrosion 4. Check gas pressure and adjust as necessary 5. Inspect for gas leaks 6. Test (TPR) temperature-pressure-release valve 7. Check the anode rod 8. Drain the tank and flush out sediment 9. Fill tank 10. Check temperature and adjust to 120 degrees as necessary 11. Inspect control box, associated controls, wiring and connections 12. Inspect for water leaks 13. Check all safety operations 14. Clean site 15. Discuss service with owner	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Thermal Efficiency	Product Capabilities	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Annual (Flat Rate)	Repair & Service (Hourly Labor Rate)	Make (Brand)	Model	Warranty Term (Years)
Commercial	Water Heat	Tank Style	Electric	50	> 0.95		ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket							
Commercial	Water Heat	Tank Style	Electric	75		≥ 97	ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket							

* CEA-2045 socket

Costs Category	Components	What should be included in flat rates	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Verify installation will meet code 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Install tank stand or plumb to the floor (do not include cost of stand) 6. Install new water heater 7. Connect wiring with 2 new wire nuts 8. Fill tank 9. Set temperature and check all controls 10. Check all safety operations 11. Clean site 12. Discuss installation and operation with owner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Open loop systems 5. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier post o Water Alarm o Relief line
EQUIPMENT	Equipment	<ol style="list-style-type: none"> 1. Source equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	<ol style="list-style-type: none"> 1. Note above
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Drain the tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with owner 	

BID SHEET INSTRUCTIONS

- * There are six tabs included in this bid sheet, each representing a separate product category.
- * Each tab includes details outlining what should and should not be included in each pricing category
- * All pricing should be entered as a flat rate, absent of taxes, unless noted otherwise
- * All input cells, defined below, must be completed for each product a proposer is submitting to manage

Input cells

Orange Cells - only these input cells should be edited

Application	Category	Type	Fuel	Capacity (btu/hr)	AFUE Efficiency (%)	Blower Motor	Combustion Stages	Product Certification	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every 12 Months (Flat Rate)	Repair & Service (Hourly Labor Rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	HVAC	Forced Air Furnace	Gas	40	> 80	High Efficiency	Single									
Residential	HVAC	Forced Air Furnace	Gas	60	> 80	High Efficiency	Single									
Residential	HVAC	Forced Air Furnace	Gas	40	> 80	High Efficiency	Two									
Residential	HVAC	Forced Air Furnace	Gas	60	> 80	High Efficiency	Two	AHR or ENERGY STAR Certified								
Residential	HVAC	Forced Air Furnace	Gas	40	> 95	High Efficiency	Single	AHR or ENERGY STAR Certified								
Residential	HVAC	Forced Air Furnace	Gas	60	≥ 95	High Efficiency	Single	AHR or ENERGY STAR Certified								
Residential	HVAC	Forced Air Furnace	Gas	40	≥ 95	High Efficiency	Two	AHR or ENERGY STAR Certified								
Residential	HVAC	Forced Air Furnace	Gas	60	≥ 95	High Efficiency	Two	AHR or ENERGY STAR Certified								
Costs Category																
What should be included in flat rate?																
<ol style="list-style-type: none"> 1. Conduct customer outreach activities. 2. Identify potential customers and conduct eligibility assessment 3. Coordinate customer qualification and approval process with PSE 4. Secure customer signature on PSE form(s) 																
What should be included from flat rates, or considered as supplemental?																
N/A																
<ol style="list-style-type: none"> 1. Perform heat loss & Manual J calculations 2. Take material measurement 3. Verify installation will meet code (venting combustion air gas pipe clearances etc.) 4. Obtain permit for installation 5. Obtain customer signature on PSE form(s) 6. Secure customer signature on PSE form(s) as appropriate 																
<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable 																
<ol style="list-style-type: none"> 1. Conduct duct blaster 2. Shut off power 3. Shut off gas line and disconnect 4. Disconnect 115v and 24 v wiring 5. Remove and dispose of old furnace 6. Remove old furnace and vent pipe 7. Get sheet metal to transition points 8. Install furnace 9. Install new sheet metal filter channel and standard filtration system 10. Seal internal and external joints 11. Install and/or reconnect venting 12. Hook up inspect and test fuel line 13. Hook up inspect and test gas line 14. Install fan switch or connect to T-stat 15. Hook up internal 24v controls and T-stat 16. Fire off unit check combustion and firing rate 17. Set fan speed check all controls run through heating cycle 18. Check a safety operations 19. Discuss installation and operation with homeowner 20. Review T-stat settings with customer to optimize their goals/system performance 21. Discuss installation and operation with homeowner 																
<ol style="list-style-type: none"> 1. Source equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 4. BTU rating on the pricing sheet indicates input BTU 5. ECM motors or X-13 motors will be considered high efficiency for pricing purposes 																
<ol style="list-style-type: none"> 1. Inspect clean and lubricate blower assembly (includes blower housing blower wheel and motor) 2. Check combustion blower housing for fat and debris and clean as necessary 3. Inspect drain pan and condensate drain lines. Clean as needed 4. Check gas pressure and adjust as necessary 5. Check gas pressure and adjust as necessary 6. Inspect for gas leaks 7. Inspect burner assembly—clean and adjust as needed 8. Inspect ignition system and safety controls—clean and adjust as needed 9. Inspect heat exchanger or heating elements 10. Inspect fuse system—check for proper attachment to the furnace any dislocated sections and for proper wire connections 11. Check Amp draw 12. Inspect control box associated controls wiring and connections 13. Clean or replace air filters 14. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 15. Check temperature rise 16. Discuss service with homeowner 17. Discuss service with homeowner 																
N/A																

Application	Category	Type	Fuel	Capacity (tons)	HSFP	SEER	Blower Motor	Product Certification	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every Two (2) Years (Flat Rate)	Repair & Service (Hourly labor rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	HVAC	Heat Pump	Electric	2	≥ 9	≥ 14	High Efficiency Blower	AHRI Certified								
Residential	HVAC	Heat Pump	Electric	2.5	≥ 9	≥ 14	High Efficiency Blower	AHRI Certified								
Residential	HVAC	Heat Pump	Electric	3	≥ 9	≥ 14	High Efficiency Blower	AHRI Certified								

Costs Category	Cost Component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> 1. Conduct customer outreach activities 2. Identify potential customers and conduct eligibility assessment 3. Coordinate customer qualification and approval process with PSE 4. Secure customer signature on PSE form(s) 	N/A
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Perform load tests & Manual T calculations 2. Take material measurement 3. Verify installation will meet code 4. Draft work order for installation 5. Schedule installation date 6. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical & electrical) and associated labor and inspection time – where applicable 1. Conduct duct blaster 2. Shut off power 3. Disconnect wiring 4. Remove and dispose of old refrigerant and lines 5. Remove and dispose of old air handler and outdoor unit 6. Design and build transition and fittings 7. Cut sheet metal to transition points 8. Install new air handler and condenser coil 9. Install new indoor blower, filter, drain and standard filtration system 10. Seal internal and external joints 11. Install new outdoor unit 12. Install new R410A compatible refrigerant lines & refrigerant 13. Complete all electrical connections 14. Charge, inspect and test refrigerant lines 15. Check all controls, run through heating and cooling cycles 16. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 17. Check all safety operations 18. Cleanup 19. Discuss installation and operation with homeowner 	<ol style="list-style-type: none"> 1. Craw space or attic installation 2. Relocation of indoor air handler 3. Relocating outdoor unit 4. Pad for outdoor unit and ground prep 5. Relocating refrigerant line 6. Additional supply or return runs 7. Increasing duct size 8. Coil upgrades 9. Condensate treatment & lockout 10. Condensate/ Condensate pump 11. T-stat relocation or rewiring installs 10. Installing new or smart stat 11. Advanced air filtration system 12. Sound Blanket for outdoor coil 13. Hand Start Kit 14. Whole house duct sealing
EQUIPMENT	Equipment	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 4. Include outdoor compressor, indoor coil, air handler, new R410A compatible refrigerant lines and refrigerant in pricing 	<ol style="list-style-type: none"> 1. Note above
STANDARD MAINTENANCE	Standard Maintenance	<p>Indoor Unit</p> <ol style="list-style-type: none"> 1. Clean blower assembly (includes blower housing, blower wheel and motor) 2. Inspect evaporator coil, drain pan and condensate drain lines. Clean as needed 3. Test condensate pump 4. Inspect refrigerant lines and connection 5. Check Amp draw 6. Inspect control box, associated controls, wiring and connections 7. Clean or replace air filters 8. Fire unit from T-stat and review settings with customer to optimize their goal/system performance <p>Outdoor Unit</p> <ol style="list-style-type: none"> 9. Check all safety operations 1. Inspect unit for proper refrigerant level and adjust if necessary 2. Clean dirt, leaves and debris from inside cabinet 3. Inspect base pan for restricted drain openings - remove obstructions as necessary 4. Inspect coil and cabinet - clean as needed 5. Check for signs of rust, corrosion, wear and damage - lubricate as needed 6. Check outdoor temperature sensor 7. Inspect control box, associated controls/accessories, wiring and connections. Controls may include capacitors, relays, circuit boards, capacitors, sump heat and other accessories. All control box and electrical parts should be checked for wear or damage. 8. Inspect compressor and associated tubing for damage 9. Check all safety operations 10. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Venting	Product Certification	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - (Every 12) Years (Flat Rate)	Repair & Service (Hourly/Labor rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	Water Heat	Tank Style	Gas	40	>0.65	Standard	ENERGYSTAR Certified and Meets 2015 IECC Standards								
Residential	Water Heat	Tank Style	Gas	50	>0.65	Standard	ENERGYSTAR Certified and Meets 2015 IECC Standards								
Residential	Water Heat	Tank Style	Gas	40	>0.65	Direct Vent	ENERGYSTAR Certified and Meets 2015 IECC Standards								
Residential	Water Heat	Tank Style	Gas	50	>0.65	Direct Vent	ENERGYSTAR Certified and Meets 2015 IECC Standards								

Cost Category	Cost Component	What should be included in flat rate?	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> 1. Conduct customer outreach activities 2. Identify potential customers and conduct eligibility assessment 3. Coordinate customer qualification and approval process with PSE 4. Secure customer signature on PSE form(s) 	N/A
STANDARD INSTALLATION	Permit/Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable 1. Shut off power 2. Shut off gas line and disconnect 3. Check inlet water pressure 4. Disconnect existing gas line 5. Disconnect existing venting of old water heater 6. Install tank stand or plumb to the floor (do not include cost of stand) 7. Install new water heater <ul style="list-style-type: none"> o Include 2 new water flex, 1 gas flex & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank 12. Check combustion and firing rate 13. Check combustion of furnace if common venting used 14. Set temperature and check all controls 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with homeowner 	<ol style="list-style-type: none"> 1. Craw space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open fire systems 7. Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code o Expansion tank o Trip pin o Gas line straps & 2x4 bracing o Barrier Post o Water Alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Realigning other appliances if fuel line removed past G valve
	Equipment	<ol style="list-style-type: none"> 1. Source equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	N/A
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Inspect ignition system and safety controls—clean and adjust as needed 2. Inspect burner assembly—clean and adjust as needed 3. Inspect flue system—check for proper attachment to the water heater, any disconnected sections and for signs of corrosion 4. Check gas pressure and adjust as necessary 5. Inspect for gas leaks 6. Inspect for water leaks—pressure-release valve 7. Check the anode rod 8. Drain the tank and flush out sediment 9. Fill tank 10. Check temperature and adjust to 120 degrees as necessary 11. Inspect control box, associated controls, wiring and connections 12. Inspect for water leaks 13. Check all safety operations 14. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Product Certification	Product Capabilities	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every Two (2) Years (Hourly Labor Rate)	Repair & Service (Hourly Labor Rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	Water Heat	Tank Style	Electric	40	≥0.95	ENERGY STAR Certified and 2015 NAECA Standards									
Residential	Water Heat	Tank Style	Electric	50	≥0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CSA-2015*** or proprietary Modular Communications Interface (MCI) socket								
Residential	Water Heat	Tank Style	Electric	40	≥0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CSA-2015*** or proprietary Modular Communications Interface (MCI) socket								
Residential	Water Heat	Tank Style	Electric	50	≥0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CSA-2015*** or proprietary Modular Communications Interface (MCI) socket								
Residential	Water Heat	Heat Pump	Electric	50	≥1.8*	NEEA Northern Climate Specification approved and 2015 NAECA Standards	ANSI/CSA-2015*** or proprietary Modular Communications Interface (MCI) socket								
Residential	Water Heat	Heat Pump	Electric	50	≥1.8*	NEEA Northern Climate Specification approved and 2015 NAECA Standards	ANSI/CSA-2015*** or proprietary Modular Communications Interface (MCI) socket								

* Northern Climate Energy Factor
 ** <http://www.ncca.org/docs/default-source/northern-climate-heat-pump-water-heater-specification-qualified-products-list.pdf>
 *** CSA-2015 socket

Cost Category	Cost Component	What should be included in flat rate?	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> Conduct customer outreach activities Obtain permit, if applicable, fees meet Coordinate customer qualification and approval process with PSE Secure customer signature on PSE forms 	N/A
STANDARD INSTALLATION	Permit Handling	<ol style="list-style-type: none"> Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - Where applicable Shut off power Disconnect wiring Check inlet water pressure Remove and dispose of old water heater Install tank stand or plumb to the floor (do not include cost of stand) Include 2 new water flex Connect wiring with 2 new wire nuts Fl Tank Set temperature and check all controls Check all safety operations Test all safety operations Discuss installation and operation with homeowner 	N/A
	Equipment	<ol style="list-style-type: none"> Source equipment to meet above specification Warehouse & inventory management Provide warranty management 	<ol style="list-style-type: none"> Crawl space or attic installation Relocation of water heater Relocation of plumbing lines Open loop systems Expansion tank <ul style="list-style-type: none"> Drip pan Earthquake straps & 2x4 bracing Barrier Post Water Alarm Beefy line
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> Test (TPR) temperature-pressure-release valve Check the anode rod Drain the tank and flush out sediment Check temperature and adjust to 120 degrees as necessary Inspect control box, associated controls, wiring and connections Inspect for water leaks Check all safety operations Clean site Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal)	Capacity (kBtu/hr)	Energy Factor	Thermal Efficiency	Venting	Product Certification	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every Two (2) Years (Flat Rate)	Repair & Service (Hourly labor rate)	Model	Warranty Term (Years)
Commercial	Water Heat	Tank Style	Gas	50	> 67	> 67	Standard	ENERGY STAR Certified								
Commercial	Water Heat	Tank Style	Gas	50	> 67	> 67	Direct Vent	ENERGY STAR Certified								
Commercial	Water Heat	Tank Style	Gas	75	upto 199	> 95	Standard									
Commercial	Water Heat	Tank Style	Gas	75	upto 199	> 95	Direct Vent									

Costs Category	Cost Component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> Conduct customer outreach activities Identify potential customers and conduct eligibility assessment Coordinate customer qualification and approval process with PSE Secure customer signature on PSE form(s) 	N/A
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> Verify installation will meet code (venting, combustion air, gas pipe, etc.) Draft work order for installation Schedule installation date Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time—where applicable 	N/A
	Standard Installation	<ol style="list-style-type: none"> Shut off power Shut off gas line and disconnect Check inlet water pressure Disconnect wiring Remove and dispose of old water heater Install tanks/stands or pump to the floor (do not include cost of stand) Install venting system <ul style="list-style-type: none"> o Include 2" new water flow, 1 gas flex & sediment trap Install and/or reconnect venting Hook up, inspect and test fuel line Connect wiring Fill Tank Fire off unit, check combustion and firing rate <ul style="list-style-type: none"> o Check combustion of furnace if common venting used Set temperature and check all controls Check all safety operations Clean site Discuss installation and operation with owner 	<ol style="list-style-type: none"> Conduit space or attic installation Relocation of water heater Relocation of plumbing lines Relocating gas line Relocating venting Open loop systems Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code o Expansion tank o Drip pan o Barnhooks, straps & 2"x4 bracing o Support posts o Water alarm o Relief line Extending gas lines for additional appliances Priming and painting gas line Relighting other appliances if fuel line removed past G valve
EQUIPMENT	Equipment	<ol style="list-style-type: none"> Source Equipment to meet above specification Warehouse & inventory management Provide warranty management 	
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> Inspect ignition system and safety controls—clean and adjust as needed Inspect burner assembly—clean and adjust as needed Inspect flue system—check for proper attachment to the water heater, any dedicated sections, and for signs of corrosion Check gas pressure and adjust as necessary Inspect for gas leaks Test (TPR) temperature-pressure-release valve Check the anode rod Drain the tank and flush out sediment Fill tank Check temperature and adjust to 120 degrees as necessary Inspect control box, associated controls, wiring and connections Inspect for water leaks Check all safety operations Discuss service with owner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Thermal Efficiency	Product Capabilities	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every Two (2) Years (Flat Rate)	Repair & Service (Hourly labor rate)	Make (Brand)	Model	Warranty Term (Years)
Commercial	Water Heat	Tank Style	Electric	50	> 0.95		ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket								
Commercial	Water Heat	Tank Style	Electric	75	> 97		ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket								

* CEA-2045 socket

Costs Category	Components	What should be included in flat rates	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> 1. Conduct customer outreach activities 2. Identify potential customers and conduct eligibility assessment 3. Coordinate customer qualification and approval process with PSE 4. Secure customer signature on PSE form(s) 	N/A
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Verify installation will meet code 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Install tank stand or plumb to the floor (do not include cost of stand) 6. Install new water heater 9. Include 2 new water heater 7. Connect wiring with 2 new wire nuts 8. Fill tank 9. Set temperature and check all controls 10. Check all safety operations 11. Clean site 12. Discuss installation and operation with owner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Open loop systems 5. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier post o Water Alarm o Relief line
EQUIPMENT	Equipment	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	<ol style="list-style-type: none"> 1. Note above
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Drain the tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with owner 	

From: [REDACTED]
Sent: Wednesday, February 03, 2016 6:13 AM
To: LeaseBid -- mail --
Subject: RFQ
Attachments: Puget Sound Energy.doc

See attached



BID SHEET INSTRUCTIONS

- * There are six tabs included in this bid sheet, each representing a separate product category.
- * Each tab includes details outlining what should and should not be included in each pricing category
- * All pricing should be entered as a flat rate, absent of taxes, unless noted otherwise
- * All input cells, defined below, must be completed for each product a proposer is submitting to manage

Input cells

Orange Cells - only these input cells should be edited

Application	Category	Type	Fuel	Capacity (kBtu/hr)	AFUE Efficiency (%)	Blower Motor	Combustion Stages	Product Certification	Standard Installation (Flat Rate)	Standard Maintenance - Every Two (2) Years (Flat Rate)	Repair & Service (Hourly labor rate)
Residential	HVAC	Forced Air Furnace	Gas	40	> 80	High Efficiency	Single				
Residential	HVAC	Forced Air Furnace	Gas	60	> 80	High Efficiency	Single				
Residential	HVAC	Forced Air Furnace	Gas	40	> 80	High Efficiency	Two				
Residential	HVAC	Forced Air Furnace	Gas	60	> 80	High Efficiency	Two				
Residential	HVAC	Forced Air Furnace	Gas	40	> 95	High Efficiency	Single	AHRI or ENERGY STAR Certified			
Residential	HVAC	Forced Air Furnace	Gas	60	> 95	High Efficiency	Single	AHRI or ENERGY STAR Certified			
Residential	HVAC	Forced Air Furnace	Gas	40	> 95	High Efficiency	Two	AHRI or ENERGY STAR Certified			
Residential	HVAC	Forced Air Furnace	Gas	60	> 95	High Efficiency	Two	AHRI or ENERGY STAR Certified			

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Perform leak loss & Manual J calculations 2. Take material measurement. 3. Verify installation will meet code (venting, combustion air, gas pipe, clearances, etc.) 4. Draft work order for installation 5. Schedule installation date 6. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 1. Conduct duct blaster 2. Shut off power 3. Shut off gas line and disconnect 4. Disconnect 115 v and 24 V wiring 5. Remove and dispose of old furnace 6. Design and build transitions 7. Cut sheet metal to transition points 8. Install furnace 9. Install new sheet metal, filter channel and standard filtration system 10. Seal internal and external joints 11. Install and/or reconnect venting 12. Hook up, inspect and test fuel line 13. Hook up, 115v wiring from J-box to furnace 14. Install fan switch or connect to t-stat 15. Hook up internal 24 v controls and t-stat 16. Fire off unit, check combustion and firing rate 17. Set fan speed, check all controls, run through heating cycle 18. Check all safety operations 19. Clean site 20. Review T-stat settings with customer to optimize their goals/system performance 21. Discuss installation and operation with homeowner 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Craw space or attic installation 2. Relocation of furnace 3. Relocating gas line 4. Relocating venting over 5. Additional supply or return runs 6. Increasing duct size 7. Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o PVC/Condensate/ Condensate pump o Increasing gas line size per code o Securing gas line to code 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. T-stat relocation or rewiring installs 11. Installing new or smart t-stat 12. Advanced air filtration system 13. Controls add-ons (temperature/humidity sensor) 14. Cutting sheetrock 15. Relighting other appliances if fuel line removed past G valve 16. Whole house duct sealing 17. Air conditioning 	N/A
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Inspect, clean and lubricate blower assembly (includes blower housing, blower wheel and motor) 2. Check combustion blower housing for lint and debris and clean as necessary 3. Inspect, drain pan and condensate drain lines. Clean as needed 4. Test condensate pump 5. Check gas pressure and adjust as necessary 6. Inspect for gas leaks 7. Inspect burner assembly—clean and adjust as needed 8. Inspect ignition system and safety controls—clean and adjust as needed 9. Inspect heat exchanger or heating elements 10. Inspect flue system—check for proper attachment to the furnace, any disconnected sections, and for signs of corrosion. 11. Check Amp draw 12. Inspect control box, associated controls, wiring and connections 13. Clean or replace air filters 14. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 15. Check temperature rise 16. Check all safety operations 17. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Capacity (tons)	HSPF	SEER	Blower Motor	Product Certification	Standard Installation (Flat Rate)	Standard Maintenance-Every Two (2) Years (Flat Rate)	Repair & Service (Hourly labor rate)
Residential	HVAC	Heat Pump	Electric	2	>9	>14	High Efficiency Blower	AHRI Certified			
Residential	HVAC	Heat Pump	Electric	2.5	>9	>14	High Efficiency Blower	AHRI Certified			
Residential	HVAC	Heat Pump	Electric	3	>9	>14	High Efficiency Blower	AHRI Certified			

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Perform heat loss & Manual J calculations 2. Take material measurement 3. Verify installation will meet code 4. Draft work order for installation 5. Schedule installation date 6. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical & electrical) and associated labor and inspection time – where applicable 1. Conduct duct blaster 2. Shut off power 3. Disconnect wiring 4. Remove and dispose of old refrigerant and lines 5. Remove and dispose of old air handler and outdoor unit 6. Design and build transitions and fittings 7. Cut sheet metal to transition points 8. Install new air handler and indoor coil 9. Install new sheet metal, filter channel and standard filtration system 10. Seal internal and external joints 11. Install new outdoor unit 12. Install new R410A compatible refrigerant lines & refrigerant 13. Complete all electrical connections 14. Charge, inspect and test refrigerant lines 15. Check all controls, run through heating and cooling cycles 16. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 17. Check all safety operations 18. Cleanup 19. Discuss installation and operation with homeowner 	N/A
	Standard Installation		<ol style="list-style-type: none"> 1. Craw space or attic installation 2. Relocation of indoor air handler 3. Relocating outdoor unit 4. Pad for outdoor unit and ground prep 5. Relocating refrigerant line 6. Additional supply or return runs 7. Increasing duct size 8. Code upgrades <ol style="list-style-type: none"> o Outdoor thermostat & lockout o Condensate/ Condensate pump 9. T-stat relocation or rewiring installs 10. Installing new or smart T-stat 11. Advanced air filtration system 12. Sound Blanket for outdoor coil 13. Hard Start kit 14. Whole house duct sealing
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Inspect and clean blower assembly (includes blower housing, blower wheel and motor) 2. Inspect evaporator coil, drain pan and condensate drain lines. Clean as needed 3. Test condensate pump 4. Inspect refrigerant lines and connection 5. Check Amp draw 6. Inspect control box, associated controls, wiring and connections 7. Clean or replace air filters 8. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 9. Check all safety operations <p>Outdoor Unit</p> <ol style="list-style-type: none"> 1. Inspect unit for proper refrigerant level and adjust if necessary 2. Clean dirt, leaves and debris from inside cabinet 3. Inspect base pan for restricted drain openings - remove obstructions as necessary 4. Inspect coil and cabinet - clean as needed 5. Inspect fan motor and fan blades for wear and damage - lubricate as needed 6. Check outdoor temperature sensors 7. Inspect control box, associated controls/accessories, wiring and connections. Controls may include contactors, relays, circuit boards, capacitors, sump heat and other accessories. All control box and electrical parts should be checked for wear or damage. 8. Inspect compressor and associated tubing for damage 9. Check all safety operations 10. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Venting	Product Certification	Standard Installation (Flat Rate)	Standard Maintenance - Years six (6) and Fifteen (15) (Flat Rate)	Repair & Service (Hourly labor rate)
Residential	Water Heat	Tank Style	Gas	40	≥ 0.65	Standard	ENERGY STAR Certified and Meets 2015 NAECA Standards			
Residential	Water Heat	Tank Style	Gas	50	≥ 0.65	Standard	ENERGY STAR Certified and Meets 2015 NAECA Standards			
Residential	Water Heat	Tank Style	Gas	40	≥ 0.65	Direct Vent	ENERGY STAR Certified and Meets 2015 NAECA Standards			
Residential	Water Heat	Tank Style	Gas	50	≥ 0.65	Direct Vent	ENERGY STAR Certified and Meets 2015 NAECA Standards			

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 2. Shut off power 3. Shut off gas line and disconnect 4. Check inlet water pressure 5. Disconnect wiring 6. Remove and dispose of old water heater 7. Install tank stand or plumb to the floor (do not include cost of stand) <ul style="list-style-type: none"> o Include 2 new water flex, 1 gas flex & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank 12. Fire off unit, check combustion and firing rate <ul style="list-style-type: none"> o Check combustion of furnace if common venting used 13. Set temperature and check all controls 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with homeowner 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Inspect ignition system and safety controls—clean and adjust as needed 2. Inspect burner assembly—clean and adjust as needed 3. Inspect flue system—check for proper attachment to the water heater, any disconnected sections, and for signs of corrosion 4. Check gas pressure and adjust as necessary 5. Inspect for gas leaks 6. Test (TPR) temperature-pressure-release valve 7. Check the anode rod 8. Drain the tank and flush out sediment 9. Fill tank 10. Check temperature and adjust to 120 degrees as necessary 11. Inspect control box, associated controls, wiring and connections 12. Inspect for water leaks 13. Check all safety operations 14. Clean site 15. Discuss service with homeowner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open loop systems 7. Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier Post o Water Alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Relighting other appliances if fuel line removed past G valve
STANDARD MAINTENANCE	Standard Maintenance		N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Product Certification	Product Capabilities	Standard Installation (Flat Rate)	Standard Maintenance - Years six (6) and Fifteen (15) (Flat Rate)	Repair & Service (Hourly labor rate)
Residential	Water Heat	Tank Style	Electric	40	> 0.95	ENERGY STAR Certified and 2015 NAECA Standards				
Residential	Water Heat	Tank Style	Electric	50	> 0.95	ENERGY STAR Certified and 2015 NAECA Standards				
Residential	Water Heat	Tank Style	Electric	40	> 0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CEA-2045*** or proprietary Modular Communications Interface (MCI) socket			
Residential	Water Heat	Tank Style	Electric	50	> 0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CEA-2045*** or proprietary Modular Communications Interface (MCI) socket			
Residential	Water Heat	Heat Pump	Electric	50	> 1.8*	NEEA Northern Climate Specification approved and 2015 NAECA Standards				
Residential	Water Heat	Heat Pump	Electric	50	> 1.8*	NEEA Northern Climate Specification approved and 2015 NAECA Standards	ANSI/CEA-2045*** or proprietary Modular Communications Interface (MCI) socket			

* Northern Climate Energy Factor
 ** <http://neea.org/docs/default-source/northern-climate-heat-pump-water-heater-specification/qualified-products-list.pdf>
 *** CEA-2045 socket

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Install tank stand or plumb to the floor (do not include cost of stand) 6. Install new water heater o Include 2 new water flex 7. Connect wiring with 2 new wire nuts 8. Fill Tank 9. Set temperature and check all controls 10. Check all safety operations 11. Clean site 12. Discuss installation and operation with homeowner 	N/A
	Standard Installation		<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Open loop systems 5. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier Post o Water Alarm o Relief line
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Drain the tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Capacity (kBtu/hr)	Energy Factor	Thermal Efficiency	Venting	Product Certification	Standard Installation (Flat Rate)	Standard Maintenance-Annual (Flat Rate)	Repair & Service (Hourly labor rate)	
Commercial	Water Heat	Tank Style	Gas	50		≥ .67		Standard	ENERGY STAR Certified				
Commercial	Water Heat	Tank Style	Gas	50		≥ .67		Direct Vent	ENERGY STAR Certified				
Commercial	Water Heat	Tank Style	Gas	75	upto 199		≥ .95	Standard					
Commercial	Water Heat	Tank Style	Gas	75	upto 199		≥ .95	Direct Vent					
Costs Category	Cost component		What should be included in flat rates?					What should be excluded from flat rates, or considered as supplemental?					
STANDARD INSTALLATION	Site Check		<ol style="list-style-type: none"> 1. Verify installation will meet code (venting, combustion air, gas pipe, clearances, etc.) 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s) 					N/A					
	Permit Handling		<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 1. Shut off power 2. Shut off gas line and disconnect 3. Check inlet water pressure 4. Disconnect wiring 5. Remove and dispose of old water heater 6. Install tank stand or plumb to the floor (do not include cost of stand) 7. Install new water heater <ul style="list-style-type: none"> o Include 2 new water flex, 1 gas flex & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank 12. Fire off unit, check combustion and firing rate <ul style="list-style-type: none"> o Check combustion of furnace if common venting used 13. Set temperature and check all controls 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with owner 					N/A					
	Standard Installation		<ol style="list-style-type: none"> 1. Craw space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open loop systems 7. Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier post o Water alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Relighting other appliances if fuel line removed past G valve 										
STANDARD MAINTENANCE	Standard Maintenance		<ol style="list-style-type: none"> 1. Inspect ignition system and safety controls—clean and adjust as needed 2. Inspect burner assembly—clean and adjust as needed 3. Inspect flue system—check for proper attachment to the water heater, any disconnected sections, and for signs of corrosion 4. Check gas pressure and adjust as necessary 5. Inspect for gas leaks 6. Test (TPR) temperature-pressure-release valve 7. Check the anode rod 8. Drain the tank and flush out sediment 9. Fill tank 10. Check temperature and adjust to 120 degrees as necessary 11. Inspect control box, associated controls, wiring and connections 12. Inspect for water leaks 13. Check all safety operations 14. Clean site 15. Discuss service with owner 					N/A					

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Thermal Efficiency	Product Capabilities	Standard Installation (Flat Rate)	Standard Maintenance - Annual (Flat Rate)	Repair & Service (Hourly labor rate)
Commercial	Water Heat	Tank Style	Electric	50	> 0.95		ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket			
Commercial	Water Heat	Tank Style	Electric	75		> 97	ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket			

* CEA-2045 socket

Costs Category	Components	What should be included in flat rates	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Verify installation will meet code 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Install tank stand or plumb to the floor (do not include cost of stand) 6. Install new water heater <ul style="list-style-type: none"> o include 2 new water flex 7. Connect wiring with 2 new wire nuts 8. Fill tank 9. Set temperature and check all controls 10. Check all safety operations 11. Clean site 12. Discuss installation and operation with owner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Open loop systems 5. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier post o Water Alarm o Relief line
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Drain the tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with owner 	

BID SHEET INSTRUCTIONS

- * There are six tabs included in this bid sheet, each representing a separate product category.
- * Each tab includes details outlining what should and should not be included in each pricing category
- * All pricing should be entered as a flat rate, absent of taxes, unless noted otherwise
- * All input cells, defined below, must be completed for each product a proposer is submitting to manage

Input cells

Orange Cells - only these input cells should be edited

Application	Category	Type	Fuel	Capacity (Btu/hr)	AFUE Efficiency (%)	Blower Motor	Combustion Stages	Product Certification	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Maintenance - Every Two (2) Years (Flat Rate)	Repair & Service (Hourly labor rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	HVAC	Forced Air Furnace	Gas	40	> 80	High Efficiency	Single								
Residential	HVAC	Forced Air Furnace	Gas	60	> 80	High Efficiency	Single								
Residential	HVAC	Forced Air Furnace	Gas	40	> 80	High Efficiency	Two								
Residential	HVAC	Forced Air Furnace	Gas	60	> 80	High Efficiency	Two								
Residential	HVAC	Forced Air Furnace	Gas	40	> 95	High Efficiency	Single	AHRI or ENERGY STAR Certified							
Residential	HVAC	Forced Air Furnace	Gas	60	> 95	High Efficiency	Single	AHRI or ENERGY STAR Certified							
Residential	HVAC	Forced Air Furnace	Gas	40	> 95	High Efficiency	Two	AHRI or ENERGY STAR Certified							
Residential	HVAC	Forced Air Furnace	Gas	60	> 95	High Efficiency	Two	AHRI or ENERGY STAR Certified							

Costs Category	Cost Component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> Perform heat loss & Manual J calculations Take material measurement Verify installation will meet code (venting, combustion air, gas pipe, clearances, etc.) Draft work order for installation Schedule installation date Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable Conduct duct blaster Shut off power Disconnect 115 v and 24 V wiring Remove and dispose of old furnace Design and build transitions Cut sheet metal to transition points Install furnace Install/replace metal filter chamber and standard filtration system Seal internal and external joints Soak internal and external joints Install and/or reconnect venting Hook up, inspect and test fuel line Hook up, 115v wiring from -box to furnace Install fan switch or connect to t-stat Hook up internal 24 v controls and t-stat Fire off unit, check combustion and firing rate <ul style="list-style-type: none"> Check combustion of water heater, if common venting used Set fan speed, check all controls, run through heating cycle Check all safety operations Clean site Review T-stat settings with customer to optimize their goals/system performance Discuss installation and operation with homeowner 	N/A
	Standard Installation	<ol style="list-style-type: none"> Inspect, clean and lubricate blower assembly (includes blower housing, blower wheel and motor) Check combustion blower housing for lint and debris and clean as necessary Inspect, drain pan and condensate drain lines. Clean as needed Test condensate pump Check gas pressure and adjust as necessary Inspect for gas leaks Inspect burner assembly—clean and adjust as needed Inspect ignition system and safety controls—clean and adjust as needed Inspect heat exchanger or heating elements Inspect flue system—check for proper attachment to the furnace, any dislocated sections, and for signs of corrosion. Check amp draw Inspect control box, associated controls, wiring and connections Clean or replace air filters Fire unit from T-stat and review settings with customer to optimize their goals/system performance Check temperatures, rise Check all safety operations Discuss service with homeowner 	N/A
EQUIPMENT	Equipment	<ol style="list-style-type: none"> Source equipment to meet above specification Warehouse & inventory management Provide warranty management BTU rating on the pricing sheet indicates input BTU ECM motors or X-13 motors will considered high-efficiency for pricing purposes 	<ol style="list-style-type: none"> Relocation of furnace Relocating gas line Relocating venting over Additional supply or return runs Changing duct size Code upgrades Adding combustion air <ul style="list-style-type: none"> B vent PVC/Condensate/ Condensate pump Increasing gas line size per code Securing gas line to code Extending gas lines for additional appliances Priming and painting gas line T-stat relocation or rewiring installs Installing new or smart t-stat Advanced air filtration system Controls add-ons (temperature/humidity sensor) Cutting sheetrock Reighting other appliances if fuel line removed past G valve Whole house duct sealing Air conditioning
STANDARD MAINTENANCE	Standard Maintenance		N/A

Application	Category	Type	Fuel	Capacity (tons)	HSPF	SEER	Blower Motor	Product Certification	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every Two (2) Years (Flat Rate)	Repair & Service (Hourly labor rate)	Model	Warranty Term (Years)
Residential	HVAC	Heat Pump	Electric	2	> 9	> 14	High Efficiency Blower	AHRI Certified						
Residential	HVAC	Heat Pump	Electric	2.5	> 9	> 14	High Efficiency Blower	AHRI Certified						
Residential	HVAC	Heat Pump	Electric	3	> 9	> 14	High Efficiency Blower	AHRI Certified						

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Perform heat loss & Manual J calculations 2. Take material measurement 3. Verify installation will meet code 4. Draft work order for installation 5. Schedule installation date 6. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical & electrical) and associated labor and inspection time - where applicable 1. Conduct duct blaster 2. Shut off power 3. Disconnect wiring 4. Remove and dispose of old refrigerant and lines 5. Remove and dispose of old air handler and outdoor unit 6. Design and build transitions and fittings 7. Cut sheet metal to transition points 8. Install new air handler and indoor coil 9. Install new sheet metal, filter channel and standard filtration system 10. Seal internal and external joints 11. Install new outdoor unit 12. Install new R410A compatible refrigerant lines & refrigerant 13. Complete all electrical connections 14. Charge, inspect and test refrigerant lines 15. Check all controls, run through heating and cooling cycles 16. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 17. Check all safety operations 18. Cleanup 19. Discuss installation and operation with homeowner 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 4. Include outdoor compressor, indoor coil, air-handler, new R410A compatible refrigerant lines and refrigerant in pricing 	<ol style="list-style-type: none"> 1. Conal space or attic installation 2. Relocation of indoor air handler 3. Relocating outdoor unit 4. Pad for outdoor unit and ground prep 5. Relocating refrigerant line 6. Additional supply or return runs 7. Increasing duct size 8. Code upgrades <ul style="list-style-type: none"> o Outdoor thermostat & lockout o Condensate/ Condensate pump 9. T-stat relocation or rewiring installs 10. Installing new or smart t-stat 11. Advanced air filtration system 12. Sound Blanket for outdoor coil 13. Hard Start Kit 14. Whole house duct sealing
EQUIPMENT	Equipment	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 4. Include outdoor compressor, indoor coil, air-handler, new R410A compatible refrigerant lines and refrigerant in pricing 	<ol style="list-style-type: none"> 1. Note above
STANDARD MAINTENANCE	Standard Maintenance	<p>Indoor Unit</p> <ol style="list-style-type: none"> 1. Inspect and clean blower assembly (includes blower housing, blower wheel and motor) 2. Inspect evaporator coil, drain pan and condensate drain lines. Clean as needed 3. Test condensate pump 4. Inspect refrigerant lines and connection 5. Check Amp draw 6. Inspect control box, associated controls, wiring and connections 7. Clean or replace air filters 8. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 9. Check all safety operations <p>Outdoor Unit</p> <ol style="list-style-type: none"> 1. Inspect unit for proper refrigerant level and adjust if necessary 2. Clean dirt, leaves and debris from inside cabinet 3. Inspect base pan for restricted drain openings - remove obstructions as necessary 4. Inspect coil and cabinet - clean as needed 5. Inspect fan motor and fan blades for wear and damage - lubricate as needed 6. Check outdoor temperature sensors 7. Inspect control box, associated controls/accessories, wiring and connections. Controls may include contactors, relays, circuit boards, capacitors, sump heat and other accessories. All control box and electrical parts should be checked for wear or damage. 8. Inspect compressor and associated tubing for damage 9. Check all safety operations 10. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Venting	Product Certification	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Years six (6) and Fifteen (15) (Flat Rate)	Repair & Service (Hourly labor rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	Water Heat	Tank Style	Gas	40	>0.65	Standard	ENERGY STAR Certified and Meets 2015 IECC Standards							
Residential	Water Heat	Tank Style	Gas	50	>0.65	Standard	ENERGY STAR Certified and Meets 2015 IECC Standards							
Residential	Water Heat	Tank Style	Gas	40	>0.65	Direct Vent	ENERGY STAR Certified and Meets 2015 IECC Standards							
Residential	Water Heat	Tank Style	Gas	50	>0.65	Direct Vent	ENERGY STAR Certified and Meets 2015 IECC Standards							

Cost Category	Cost Component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Permit/Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time—where applicable 2. Shut off power 3. Check inlet gas line and disconnect 4. Disconnect wiring 5. Remove and dispose of old water heater 6. Install tank stand or plumb to the floor (do not include cost of stand) 7. Install new water heater <ul style="list-style-type: none"> o Include 2 new water flex, 1 gas flex, & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank 12. Fire off unit, check combustion and firing rate <ul style="list-style-type: none"> o Check combustion of furnace if common venting used 13. Set temperature and check all controls 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with homeowner 	N/A
	Equipment	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	<ol style="list-style-type: none"> 1. Craw space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open loop systems <ul style="list-style-type: none"> o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code 7. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier Post o Water Alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Reighting other appliances if fuel line removed past C value
STANDARD MAINTENANCE	Equipment	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	N/A
	Standard Maintenance	<ol style="list-style-type: none"> 1. Inspect ignition system and safety controls—clean and adjust as needed 2. Inspect burner assembly—clean and adjust as needed 3. Inspect flue system—check for proper attachment to the water heater, any disconnected sections, and for signs of corrosion 4. Check gas pressure and adjust as necessary 5. Inspect for gas leaks 6. Test (PR) temperature-pressure release valve 7. Check the anode rod 8. Fill the tank and flush out sediment 9. Fill the tank 10. Check temperature and adjust to 120 degrees as necessary 11. Inspect control box, associated controls, wiring and connections 12. Inspect for water leaks 13. Check all safety operations 14. Clean site 15. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Product Certification	Product Capabilities	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Years six (6) and fifteen (15) (Flat Rate)	Repair & Service (Hourly Labor Rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	Water Heat	Tank Style	Electric	40	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards								
Residential	Water Heat	Tank Style	Electric	50	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards								
Residential	Water Heat	Tank Style	Electric	40	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CEA-2005*** or proprietary Modular Communications Interface (MCI) socket							
Residential	Water Heat	Tank Style	Electric	50	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CEA-2005*** or proprietary Modular Communications Interface (MCI) socket							
Residential	Water Heat	Heat Pump	Electric	50	≥ 1.18*	Specification approved and 2015 NECA Northern Climate	ANSI/CEA-2005*** or proprietary Modular Communications Interface (MCI) socket							
Residential	Water Heat	Heat Pump	Electric	50	≥ 1.18*	Specification approved and 2015 NAECA Standards								

* Northern Climate Energy Factor
<http://www.northernclimate.com/resources/northern-climate-hot-water-heater-specification/qualified-products-list.pdf>
 ** CEA-2005 socket

Cost Category	Cost Component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Permit/Handling	1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Install tank stand or plumb to the floor (do not include cost of stand) 6. Install new water heater 7. Connect wiring with 2 new wire nuts 8. Fill tank 9. Check venting and check all controls 10. Check all safety operations 11. Clean site 12. Discuss installation and operation with homeowner	N/A
	Standard Installation		1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Open loop systems 5. Code upgrades 6. Expansion tank 7. Drip pan 8. Antiquates straps & 2x4 bracing 9. Water alarm 10. Relief line
EQUIPMENT	Equipment	1. Source equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management	1. Note above
STANDARD MAINTENANCE	Standard Maintenance	1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Drain the tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with homeowner	N/A

Application	Category	Type	Fuel	Size (gal.)	Capacity (klb/hr)	Energy Factor	Thermal Efficiency	Venting	Product Certification	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance-Annual (Flat Rate)	Repair & Service (Hourly/labor rate)	Make (Brand)	Model	Warranty Term (Years)
Commercial	Water Heat	Tank Style	Gas	50		> 67		Standard	ENERGY STAR Certified							
Commercial	Water Heat	Tank Style	Gas	50		> 67		Direct Vent	ENERGY STAR Certified							
Commercial	Water Heat	Tank Style	Gas	75	upto 199		> 95	Standard								
Commercial	Water Heat	Tank Style	Gas	75	upto 199		> 95	Direct Vent								

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	1. Verify installation will meet code (venting, combustion air, gas pipe, clearances, etc.) 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s)	N/A
	Permit Handling	1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable	N/A
	Standard Installation	1. Shut off power 2. Shut off gas line and disconnect 3. Check inlet water pressure 4. Disconnect wiring 5. Remove and dispose of old water heater 6. Install tank stand or plumb to the floor (do not include cost of stand) 7. Install new water heater o Include 2 new water flex, 1 gas flex & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank 12. Fire off unit, check combustion and firing rate o Check combustion of furnace if common venting used 13. Set temperature and check all controls 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with owner	1. Craw space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open loop systems 7. Code upgrades o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier post o Water alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Relighting other appliances, if fuel line removed past G valve
EQUIPMENT	Equipment	1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management	
STANDARD MAINTENANCE	Standard Maintenance	1. Inspect ignition system and safety controls—clean and adjust as needed 2. Inspect burner assembly—clean and adjust as needed 3. Inspect flue system—check for proper attachment to the water heater, any disconnected sections, and for signs of corrosion 4. Check gas pressure and adjust as necessary 5. Inspect for gas leaks 6. Test (TPR) temperature-pressure-release valve 7. Check the anode rod 8. Drain the tank and flush out sediment 9. Fill tank 10. Check temperature and adjust to 120 degrees as necessary 11. Inspect control box, associated controls, wiring and connections 12. Inspect for water leaks 13. Check all safety operations 14. Clean site 15. Discuss service with owner	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Thermal Efficiency	Product Capabilities	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Annual (Flat Rate)	Repair & Service (Hourly labor rate)	Make (Brand)	Model	Warranty Term (Years)
Commercial	Water Heat	Tank Style	Electric	50	> 0.95		ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket							
Commercial	Water Heat	Tank Style	Electric	75		≥ 97	ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket							

* CEA-2045 socket

Costs Category	Components	What should be included in flat rates	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Verify installation will meet code 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Install tank stand or plumb to the floor (do not include cost of stand) 6. Install new water heater 7. Connect wiring with 2 new wire nuts 8. Fill tank 9. Set temperature and check all controls 10. Check all safety operations 11. Clean site 12. Discuss installation and operation with owner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Open loop systems 5. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier post o Water Alarm o Relief line
EQUIPMENT	Equipment	<ol style="list-style-type: none"> 1. Source equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	<ol style="list-style-type: none"> 1. Note above
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Drain the tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with owner 	

BID SHEET INSTRUCTIONS

- * There are six tabs included in this bid sheet, each representing a separate product category.
- * Each tab includes details outlining what should and should not be included in each pricing category
- * All pricing should be entered as a flat rate, absent of taxes, unless noted otherwise
- * All input cells, defined below, must be completed for each product a proposer is submitting to manage

Input cells

Orange Cells - only these input cells should be edited

Application	Category	Type	Fuel	Capacity (btu/hr)	AFUE Efficiency (%)	Blower Motor	Combustion Stages	Product Certification	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every 6 Months (Flat Rate)	Repair & Service (Hourly Labor Rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	HVAC	Forced Air Furnace	Gas	40	> 80	High Efficiency	Single									
Residential	HVAC	Forced Air Furnace	Gas	60	> 80	High Efficiency	Single									
Residential	HVAC	Forced Air Furnace	Gas	40	> 80	High Efficiency	Two									
Residential	HVAC	Forced Air Furnace	Gas	60	> 80	High Efficiency	Two	AHRI or ENERGY STAR Certified								
Residential	HVAC	Forced Air Furnace	Gas	40	> 95	High Efficiency	Single	AHRI or ENERGY STAR Certified								
Residential	HVAC	Forced Air Furnace	Gas	60	≥ 95	High Efficiency	Single	AHRI or ENERGY STAR Certified								
Residential	HVAC	Forced Air Furnace	Gas	40	≥ 95	High Efficiency	Two	AHRI or ENERGY STAR Certified								
Residential	HVAC	Forced Air Furnace	Gas	60	≥ 95	High Efficiency	Two	AHRI or ENERGY STAR Certified								
Costs Category																
What should be included in flat rate?																
<ol style="list-style-type: none"> 1. Conduct customer outreach activities. 2. Identify potential customers and conduct eligibility assessment 3. Coordinate customer qualification and approval process with PSE 4. Secure customer signature on PSE form(s) 																
Customer Acquisition																
<ol style="list-style-type: none"> 1. Perform heat loss & Manual J calculations 2. Take material measurement 3. Verify installation will meet code (venting combustion air gas pipe clearances etc.) 4. Obtain permit for installation 5. Schedule installation 6. Secure customer signature on PSE form(s) as appropriate 																
Site Check																
<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable 																
Permit Handling																
<ol style="list-style-type: none"> 1. Conduct duct blaster 2. Shut off power 3. Shut off gas line and disconnect 4. Disconnect 115v and 24 V wiring 5. Remove and dispose of old furnace 6. Remove old gas line and vent pipe 7. Get sheet metal to transition points 8. Install furnace 9. Install new sheet metal filter channel and standard filtration system 10. Seal internal and external joints 11. Install and/or reconnect venting 12. Hook up inspect and test fuel line 13. Hook up inspect and test gas line 14. Install fan switch or connect to T-stat 15. Hook up internal 24v controls and T-stat 16. Fire off unit check combustion and firing rate 17. Set fan speed check all controls run through heating cycle 18. Check a safety operations 19. Check for gas leaks 20. Review T-stat settings with customer to optimize their goals/system performance 21. Discuss installation and operation with homeowner 																
Standard Installation																
<ol style="list-style-type: none"> 1. Growl space or attic installation 2. Relocating of furnace 3. Relocating gas line 4. Relocating venting over 5. Relocating return air 6. Increasing duct size 7. Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o PVC/Condensate/ Condensate pump o Increasing gas line size per code 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. T-stat relocation or rewiring installs 11. Installing new or smart T-stat 12. Advanced air filtration system 13. Controls add-ons (temperature/humidity sensor) 14. Relocating of water heater 15. Relighting other appliances if fuel line removed past G valve 16. Whole house duct sealing 17. Air conditioning 																
Equipment																
<ol style="list-style-type: none"> 1. Note above 																
Equipment																
<ol style="list-style-type: none"> 1. Source equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 4. BTU rating on the pricing sheet indicates input BTU 5. ECM motors or X-13 motors will be considered high-efficiency for pricing purposes 																
Equipment																
<ol style="list-style-type: none"> 1. Inspect clean and lubricate blower assembly (includes blower housing blower wheel and motor) 2. Check combustion blower housing for fat and debris and clean as necessary 3. Check gas pressure and adjust as necessary 4. Inspect drain pan and condensate drain lines. Clean as needed 5. Check gas pressure and adjust as necessary 6. Inspect for gas leaks 7. Inspect burner assembly—clean and adjust as needed 8. Inspect ignition system and safety controls—clean and adjust as needed 9. Inspect heat exchanger or heating elements 10. Inspect fuse system—check for proper attachment to the furnace any dislocated sections and for proper wire connections 11. Check Amp draw 12. Inspect control box, associated controls, wiring and connections 13. Clean or replace air filters 14. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 15. Check temperature rise 16. Check for gas leaks 17. Discuss service with homeowner 																
Standard Maintenance																
<ol style="list-style-type: none"> 1. Note above 																
Standard Maintenance																
<ol style="list-style-type: none"> 1. Note above 																

Application	Category	Type	Fuel	Capacity (tons)	HSFP	SEER	Blower Motor	Product Certification	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every Two (2) Years	Repair & Service (Hourly labor rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	HVAC	Heat Pump	Electric	2	≥ 9	≥ 14	High Efficiency Blower	AHRI Certified								
Residential	HVAC	Heat Pump	Electric	2.5	≥ 9	≥ 14	High Efficiency Blower	AHRI Certified								
Residential	HVAC	Heat Pump	Electric	3	≥ 9	≥ 14	High Efficiency Blower	AHRI Certified								

Costs Category	Cost Component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> Conduct customer outreach activities Identify potential customers and conduct eligibility assessment Coordinate customer qualification and approval process with PSE Secure customer signature on PSE form(s) 	N/A
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> Perform load loss & Manual J calculations Take material measurement Verify installation will meet code Draft work order for installation Schedule installation date Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> Handling fee for obtaining standard permit (mechanical & electrical) and associated labor and inspection time - where applicable Conduct duct blaster Shut off power Disconnect wiring Remove and dispose of old refrigerant and lines Remove and dispose of old air handler and outdoor unit Design and build transition and fittings Cut sheet metal to transition points Install new air handler on roof coil Install new air handler, filter, blower cabinet and standard filtration system Seal internal and external joints Install new outdoor unit Install new R410A compatible refrigerant lines & refrigerant Complete all electrical connections Charge, inspect and test refrigerant lines Check all controls, run through heating and cooling cycles Fire unit from T-stat and review settings with customer to optimize their goals/system performance Check all safety operations Cleanup Discuss installation and operation with homeowner 	<ol style="list-style-type: none"> Crawl space or attic installation Relocation of indoor air handler Relocating outdoor unit Pad for outdoor unit and ground prep Relocating refrigerant line Additional supply or return runs Increasing duct size Cob upgrades Change thermostat & lockout Condensate/ Condensate pump T-stat relocation or rewiring installs Installing new or smart stat Advanced air filtration system Sound Blanket for outdoor coil Hard Start Kit Whole house duct sealing
	Equipment	<ol style="list-style-type: none"> Source equipment to meet above specification Warehouse & inventory management Provide warranty management Include outdoor compressor, indoor coil, air handler, new R410A compatible refrigerant lines and refrigerant in pricing 	<ol style="list-style-type: none"> Note above
STANDARD MAINTENANCE	Standard Maintenance	<p>Indoor Unit</p> <ol style="list-style-type: none"> Inspect and clean blower assembly (includes blower housing, blower wheel and motor) Inspect evaporator coil, drain pan and condensate drain lines. Clean as needed Test condensate pump Inspect refrigerant lines and connection Check Amp draw Inspect control box, associated controls, wiring and connections Clean or replace air filters Fire unit from T-stat and review settings with customer to optimize their goal/system performance <p>Outdoor Unit</p> <ol style="list-style-type: none"> Check all safety operations Inspect unit for proper refrigerant level and adjust if necessary Clean dirt, leaves and debris from inside cabinet Inspect base pan for restricted drain openings - remove obstructions as necessary Inspect coil and cabinet - clean as needed Inspect for signs of rust, corrosion, wear and damage - lubricate as needed Check outdoor temperature sensor wear and damage Inspect control box, associated controls/accessories, wiring and connections. Controls may include capacitors, relays, circuit boards, capacitors, sump heat and other accessories. All control box and electrical parts should be checked for wear or damage. Inspect compressor and associated tubing for damage Check all safety operations Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Venting	Product Certification	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - (Every 12 Years) (Flat Rate)	Repair & Service (Hourly labor rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	Water Heat	Tank Style	Gas	40	>0.65	Standard	ENERGY STAR Certified and Meets 2015 IECC Standards								
Residential	Water Heat	Tank Style	Gas	50	>0.65	Standard	ENERGY STAR Certified and Meets 2015 IECC Standards								
Residential	Water Heat	Tank Style	Gas	40	>0.65	Direct Vent	ENERGY STAR Certified and Meets 2015 IECC Standards								
Residential	Water Heat	Tank Style	Gas	50	>0.65	Direct Vent	ENERGY STAR Certified and Meets 2015 IECC Standards								

Cost Category	Cost Component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> 1. Conduct customer outreach activities 2. Identify potential customers and conduct eligibility assessment 3. Coordinate customer qualification and approval process with PSE 4. Secure customer signature on PSE form(s) 	N/A
STANDARD INSTALLATION	Permit/Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable 1. Shut off power 2. Shut off gas line and disconnect 3. Check inlet water pressure 4. Disconnect existing gas line 5. Disconnect existing gas line of old water heater 6. Install tank stand or plumb to the floor (do not include cost of stand) 7. Install new water heater <ul style="list-style-type: none"> o Include 2 new water flex, 1 gas flex & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill tank 12. Check combustion and firing rate 13. Check combustion of furnace if common venting used 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with homeowner 	<ol style="list-style-type: none"> 1. Craw space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open gas systems 7. Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code o Expansion tank o Drip pan o Gas line straps & 2x4 bracing o Barrier Post o Water Alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Realigning other appliances if fuel line removed past G valve
	Equipment	<ol style="list-style-type: none"> 1. Source equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	N/A
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Inspect ignition system and safety controls—clean and adjust as needed 2. Inspect burner assembly—clean and adjust as needed 3. Inspect flue system—check for proper attachment to the water heater, any disconnected sections and for signs of corrosion 4. Check gas pressure and adjust as necessary 5. Inspect for gas leaks 6. Inspect for water leaks—pressure-release valve 7. Check the anode rod 8. Drain the tank and flush out sediment 9. Fill tank 10. Check temperature and adjust to 120 degrees as necessary 11. Inspect control box, associated controls, wiring and connections 12. Inspect for water leaks 13. Check all safety operations 14. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Product Certification	Product Capabilities	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance Events (Flat Rate)	Repair & Service (Hourly/labor rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	Water Heat	Tank Style	Electric	40	≥0.95	ENERGY STAR Certified and 2015 NAECA Standards									
Residential	Water Heat	Tank Style	Electric	50	≥0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CSA-2015*** or proprietary Modular Communications Interface								
Residential	Water Heat	Tank Style	Electric	40	≥0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CSA-2015*** or proprietary Modular Communications Interface								
Residential	Water Heat	Tank Style	Electric	50	≥0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CSA-2015*** or proprietary Modular Communications Interface								
Residential	Water Heat	Heat Pump	Electric	50	≥1.8*	NECA Northern Climate Applications approved and 2015 NAECA Standards	ANSI/CSA-2015*** or proprietary Modular Communications Interface								
Residential	Water Heat	Heat Pump	Electric	50	≥1.8*	NECA Northern Climate Applications approved and 2015 NAECA Standards	ANSI/CSA-2015*** or proprietary Modular Communications Interface								

* Northern Climate Energy Factor
 ** <http://www.necanet.org/default-source/energy-factor/energy-factor-requirements-for-water-heaters.pdf>
 *** CSA-2015 socket

Cost Category	Cost Component	What should be included in flat rate?	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> Conduct customer outreach activities Obtain permit, if applicable, fees meet Coordinate customer qualification and approval process with PSE Secure customer signature on PSE forms 	N/A
STANDARD INSTALLATION	Permit Handling	<ol style="list-style-type: none"> Handling fee for obtaining standard permit (mechanical and associated labor and inspection time - Where applicable) Shut off power Disconnect wiring Check inlet water pressure Remove and dispose of old water heater Install tank stand or plumb to the floor (do not include cost of stand) Remove old water heater Include 2 new water flex Connect wiring with 2 new wire nuts Fl Tank Set temperature and check all controls Check all safety operations Test for leaks Discard installation and operation with homeowner 	<ol style="list-style-type: none"> Crawl space or attic installation Relocation of water heater Relocation of plumbing lines Open loop systems Expansion tank <ul style="list-style-type: none"> Drip pan Earthquake straps & 2x4 bracing Barrier Post Water Alarm Water line
	Equipment	<ol style="list-style-type: none"> Source Equipment to meet above specification Warehouse & inventory management Provide warranty management 	<ol style="list-style-type: none"> Note above
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> Test (TPR) temperature-pressure-release valve Check the anode rod Drain the tank and flush out sediment Check temperature and adjust to 120 degrees as necessary Inspect control box, associated controls, wiring and connections Inspect for water leaks Check all safety operations Clean site Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal)	Capacity (kBu/hr)	Energy Factor	Thermal Efficiency	Venting	Product Certification	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every Two (2) Years (Flat Rate)	Repair & Service (Hourly labor rate)	Model	Warranty Term (Years)
Commercial	Water Heat	Tank Style	Gas	50		≥ 67	Standard	Standard	ENERGY STAR Certified							
Commercial	Water Heat	Tank Style	Gas	50		≥ 67	Direct Vent	Direct Vent	ENERGY STAR Certified							
Commercial	Water Heat	Tank Style	Gas	75	upto 199	≥ 95	Standard	Standard								
Commercial	Water Heat	Tank Style	Gas	75	upto 199	≥ 95	Direct Vent	Direct Vent								

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> 1. Conduct customer outreach activities 2. Identify potential customers and conduct eligibility assessment 3. Coordinate customer qualification and approval process with PSE 4. Secure customer signature on PSE form(s) 	N/A
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Verify installation will meet code (venting, combustion air, gas pipe, etc.) 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time—where applicable 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Shut off power 2. Shut off gas line and disconnect 3. Check inlet water pressure 4. Disconnect wiring 5. Remove and dispose of old water heater 6. Install tanks/stands or pumps to the floor (do not include cost of stand) 7. Install venting 8. Include 2" new water flow, 1 gas flex & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank 12. Fire off unit, check combustion and firing rate 13. Check combustion of furnace if common venting used 14. Set temperature and check all controls 15. Check all safety operations 16. Clean site 16. Discuss installation and operation with owner 	<ol style="list-style-type: none"> 1. Cover space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open loop systems 7. Code upgrades 8. Adding combustion air 9. B vent 10. Increasing gas line size per code 11. Securing gas line to code 12. Expansion tank 13. Drip pan 14. Barnhooks, straps & 2"x4 bracing 15. Water pipes 16. Water alarm 17. Relief line 18. Extending gas lines for additional appliances 19. Priming and painting gas line 20. Realigning other appliances if fuel line removed past G valve
EQUIPMENT	Equipment	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Inspect ignition system and safety controls—clean and adjust as needed 2. Inspect burner assembly—clean and adjust as needed 3. Inspect flue system—check for proper attachment to the water heater, any disconnected sections, and for signs of corrosion 4. Check gas pressure and adjust as necessary 5. Inspect for gas leaks 6. Test (TPR) temperature-pressure-release valve 7. Check the anode rod 8. Drain the tank and flush out sediment 9. Fill tank 10. Check temperature and adjust to 120 degrees as necessary 11. Inspect control box, associated controls, wiring and connections 12. Inspect for water leaks 13. Check all safety operations 14. Discuss safety with owner 15. Discuss service with owner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Thermal Efficiency	Product Capabilities	Customer Acquisition (Flat Rate)	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Every Two (2) Years (Flat Rate)	Repair & Service (Hourly labor rate)	Make (Brand)	Model	Warranty Term (Years)
Commercial	Water Heat	Tank Style	Electric	50	> 0.95		ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket								
Commercial	Water Heat	Tank Style	Electric	75	> 97		ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket								

* CEA-2045 socket

Costs Category	Components	What should be included in flat rates	What should be excluded from flat rates, or considered as supplemental?
CUSTOMER ACQUISITION	Customer Acquisition	<ol style="list-style-type: none"> 1. Conduct customer outreach activities 2. Identify potential customers and conduct eligibility assessment 3. Coordinate customer qualification and approval process with PSE 4. Secure customer signature on PSE form(s) 	N/A
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> 1. Verify installation will meet code 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time - where applicable 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Install tank stand or plumb to the floor (do not include cost of stand) 6. Install new water heater 9. Include 2 new water flex 7. Connect wiring with 2 new wire nuts 8. Fill tank 9. Set temperature and check all controls 10. Check all safety operations 11. Clean site 12. Discuss installation and operation with owner 	N/A
	Standard Installation	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Open loop systems 5. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier post o Water Alarm o Relief line 	
EQUIPMENT	Equipment	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	<ol style="list-style-type: none"> 1. Note above
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> 1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Drain the tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with owner 	

From: [REDACTED]
Sent: Wednesday, February 10, 2016 9:14 AM
To: LeaseBid -- mail --
Subject: RE: PSE Lease Solutions Program RFQual
Attachments: Hybrid_Path_Bid_Sheet_Lease_Solutions_.xlsx

My apologies for not catching that. Here you go.

Thanks

[REDACTED]

From: LeaseBid -- mail -- [<mailto:LeaseBid@pse.com>]
Sent: Wednesday, February 10, 2016 8:25 AM
To: LeaseBid -- mail --; [REDACTED]
Subject: RE: PSE Lease Solutions Program RFQual
Importance: High

Dear [REDACTED]

Following up regarding the below email. In [REDACTED] May 2015 RFQ bid you included costs for installing and servicing commercial electric equipment, can you confirm whether they are still appropriate? If not we would like to have more current cost data.

Malcolm McCulloch
Manager, Leasing
PUGET SOUND ENERGY
425-424-6530 tel
425-213-9839 cell
www.PSE.com

From: LeaseBid -- mail --
Sent: Thursday, February 04, 2016 3:54 PM
To: [REDACTED] LeaseBid -- mail --
Subject: RE: PSE Lease Solutions Program RFQual

[REDACTED]

Thank you for your submittal. Could you please confirm which equipment costs should be used in reference to the Commercial 50 gallon tanks? Also, we do not see inclusion of Commercial electric units within the bid...was that omitted on purpose.

Sincerely

PSE Lease Solutions Selection Team

From: Steve Phillip [REDACTED]
Sent: Thursday, February 04, 2016 2:38 PM
To: LeaseBid -- mail --
Subject: RE: PSE Lease Solutions Program RFQual

Sorry about that. I've attached the excel sheet.

Thanks



From: LeaseBid -- mail -- [<mailto:LeaseBid@pse.com>]
Sent: Thursday, February 04, 2016 2:28 PM
To: [REDACTED]s
Subject: RE: PSE Lease Solutions Program RFQual



The bid sheet below is inserted as a picture rather than an attachment. Please send again as an attachment.

Thank you,
PSE Lease Solutions Selection Team

From: [REDACTED]
Sent: Thursday, February 04, 2016 12:58 PM
To: LeaseBid -- mail --
Subject: FW: PSE Lease Solutions Program RFQual

Attached is everything required?



Thanks



From: LeaseBid -- mail -- [<mailto:LeaseBid@pse.com>]
Sent: Wednesday, January 20, 2016 8:47 AM
To: LeaseBid -- mail --
Subject: RE: PSE Lease Solutions Program RFQual

Dear valued partners,

We are excited to introduce an enhanced business opportunity for your consideration in connection to PSEs Lease Solutions service. To effectively deliver a comprehensive lease offer, that will expand participation in the existing market by current non-participants, PSE would like to work with its valued service partners to facilitate the equipment distribution and in-home fulfillment tasks, including pre-installation site checks, permitting, installation, maintenance, and repair services. In addition, the expanded Lease Solutions service will offer the flexibility for contracted service partners to also source and manage the equipment, should that choice be preferred.

Since you represent the values PSE strives for in delivering safe, dependable and efficient products and services to its customers, we need your help to effectively deliver this service.

The attached Request for Qualifications and Rates document provides the details of the service as well as embedded files for review and the rate sheets for your response(s). Please open each attachment to be fully informed of the process and access the forms for your response.

NOTE: One of the embedded files is a Non-Disclosure Agreement (NDA) that is to be printed, signed, scanned and returned with your email response if your company did not provide an NDA in 2015 during the previous RFQ interest.

As per the instructions in the RFQ, all questions about the program and bid process are to be submitted via email to this email address within the documented schedule. PSE looks forward to receiving your questions to enable clarification for all bidders, which will allow PSE to evaluate the responses equally.

Thank you for your interest in supporting PSE with the decisions to be made concerning the Lease Solutions service.

Sincerely,
PSE Lease Solutions Selection Team

BID SHEET INSTRUCTIONS

- * There are six tabs included in this bid sheet, each representing a separate product category.
- * Each tab includes details outlining what should and should not be included in each pricing category
- * All pricing should be entered as a flat rate, absent of taxes, unless noted otherwise
- * All input cells, defined below, must be completed for each product a proposer is submitting to manage

Input cells

Orange Cells - only these input cells should be edited

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Venting	Product Certification	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance - Years six (6) and Fifteen (15) (Flat Rate)	Repair & Service (Hourly labor rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	Water Heat	Tank Style	Gas	40	>0.65	Standard	ENERGY STAR Certified and Meets 2015 IECC Standards							
Residential	Water Heat	Tank Style	Gas	50	>0.65	Standard	ENERGY STAR Certified and Meets 2015 IECC Standards							
Residential	Water Heat	Tank Style	Gas	40	>0.65	Direct Vent	ENERGY STAR Certified and Meets 2015 IECC Standards							
Residential	Water Heat	Tank Style	Gas	50	>0.65	Direct Vent	ENERGY STAR Certified and Meets 2015 IECC Standards							

Cost Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Permit/Handling	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time—where applicable 2. Shut off power 3. Check inlet gas line and disconnect 4. Disconnect wiring 5. Remove and dispose of old water heater 6. Install tank stand or plumb to the floor (do not include cost of stand) 7. Install new water heater <ul style="list-style-type: none"> o Include 2 new water flex, 1 gas flex, & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank 12. Fire off unit, check combustion and firing rate <ul style="list-style-type: none"> o Check combustion of furnace if common venting used 13. Set temperature and check all controls 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with homeowner 	N/A
	Equipment	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	<ol style="list-style-type: none"> 1. Craw space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open loop systems <ul style="list-style-type: none"> o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code 7. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier Post o Water Alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Reighting other appliances if fuel line removed past C value
STANDARD MAINTENANCE	Equipment	<ol style="list-style-type: none"> 1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management 	N/A
	Standard Maintenance	<ol style="list-style-type: none"> 1. Inspect ignition system and safety controls—clean and adjust as needed 2. Inspect burner assembly—clean and adjust as needed 3. Inspect flue system—check for proper attachment to the water heater, any disconnected sections, and for signs of corrosion 4. Check gas pressure and adjust as necessary 5. Inspect for gas leaks 6. Test (TPR) temperature-pressure release valve 7. Check the anode rod 8. Flush the tank and flush out sediment 9. Fill tank with water 10. Check temperature and adjust to 120 degrees as necessary 11. Inspect control box, associated controls, wiring and connections 12. Inspect for water leaks 13. Check all safety operations 14. Clean site 15. Discuss service with homeowner 	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Venting	Product Certification	Equipment Cost (Flat Rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	Water Heat	Tank Style	Gas	40	0.62	Standard	Meets 2015 NAECA Standards Meets 2015 NAECA Standards ENERGY STAR Certified and Meets				
					0.62		2015 NAECA Standards				
					0.69		ENERGY STAR Certified and Meets				
					0.67		2015 NAECA Standards				
Residential	Water Heat	Tank Style	Gas	50	0.6	Standard	Meets 2015 NAECA Standards				
					0.61		Meets 2015 NAECA Standards				
					0.6		Meets 2015 NAECA Standards				
					0.67		ENERGY STAR Certified and Meets				
					0.67		2015 NAECA Standards				
Residential	Water Heat	Tank Style	Gas	40	0.6	Direct Vent	ENERGY STAR Certified and Meets				
					0.6		2015 NAECA Standards				
Residential	Water Heat	Tank Style	Gas	50	0.6	Direct Vent	Meets 2015 NAECA Standards				

REDACTED VERSION

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Product Certification	Product Capabilities	Standard Installation (flat rate)	Equipment Cost (flat rate)	Standard Maintenance - Years six (6) and fifteen (15) (flat rate)	Repair & Service (hourly labor rates)	Make (brand)	Model	Warranty Term (years)
Residential	Water Heat	Tank Style	Electric	40	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards								
Residential	Water Heat	Tank Style	Electric	50	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards								
Residential	Water Heat	Tank Style	Electric	40	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CEA-2005*** or proprietary Modular Communications Interface (MCI) socket							
Residential	Water Heat	Tank Style	Electric	50	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CEA-2005*** or proprietary Modular Communications Interface (MCI) socket							
Residential	Water Heat	Heat Pump	Electric	50	≥ 1.18*	Specification approved and 2015 NEFA Northern Climate								
Residential	Water Heat	Heat Pump	Electric	50	≥ 1.18**	Specification approved and 2015 NAECA Standards								

* Northern Climate Energy Factor
<http://www.nce.com/docs/default-source/northern-climate-hot-water-heater-specification/qualified-products-list.pdf>
 ** CEA 2005 socket

Cost Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Permit/Handling	1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Install tank stand or plumb to the floor (do not include cost of stand) 6. Install new water heater 7. Connect wiring with 2 new wire nuts 8. Fill tank 9. Check temperatures and check all controls 10. Check all safety operations 11. Clean site 12. Discuss installation and operation with homeowner	N/A
	Standard Installation		1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Open loop systems 5. Code upgrades 6. Expansion tank 7. Drip pan 8. Antiquates straps & 2x4 bracing 9. Water alarm 10. Water alarm 11. Relief line
EQUIPMENT	Equipment	1. Source equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management	1. Note above
STANDARD MAINTENANCE	Standard Maintenance	1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Drain the tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with homeowner	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Product Certification	Product Capabilities	Equipment Cost (Flat Rate)	Make (Brand)	Model	Warranty Term (Years)
Residential	Water Heat	Tank Style	Electric	40	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards					
Residential	Water Heat	Tank Style	Electric	50	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards					
Residential	Water Heat	Tank Style	Electric	40	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CEA-2045*** or proprietary Modular Communications Interface (MCI) socket				
Residential	Water Heat	Tank Style	Electric	50	≥ 0.95	ENERGY STAR Certified and 2015 NAECA Standards	ANSI/CEA-2045*** or proprietary Modular Communications Interface (MCI) socket				
Residential	Water Heat	Heat Pump	Electric	50	> 1.8*	NEEA Northern Climate Specification approved and 2015 NAECA Standards					
Residential	Water Heat	Heat Pump	Electric	50	> 1.8*	NEEA Northern Climate Specification approved and 2015 NAECA Standards	ANSI/CEA-2045*** or proprietary Modular Communications Interface (MCI) socket				

REDACTED VERSION

Application	Category	Type	Fuel	Size (gal.)	Capacity (klb/hr)	Energy Factor	Thermal Efficiency	Venting	Product Certification	Standard Installation (Flat Rate)	Equipment Cost (Flat Rate)	Standard Maintenance-Annual (Flat Rate)	Repair & Service (Hourly/labor rate)	Make (Brand)	Model	Warranty Term (Years)
Commercial	Water Heat	Tank Style	Gas	50		> 67		Standard	ENERGY STAR Certified							
Commercial	Water Heat	Tank Style	Gas	50		> 67		Direct Vent	ENERGY STAR Certified							
Commercial	Water Heat	Tank Style	Gas	75	upto 199		> 95	Standard								
Commercial	Water Heat	Tank Style	Gas	75	upto 199		> 95	Direct Vent								

Costs Category	Cost component	What should be included in flat rates?	What should be excluded from flat rates, or considered as supplemental?
STANDARD INSTALLATION	Site Check	1. Verify installation will meet code (venting, combustion air, gas pipe, clearances, etc.) 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s)	N/A
	Permit Handling	1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable	N/A
	Standard Installation	1. Shut off power 2. Shut off gas line and disconnect 3. Check inlet water pressure 4. Disconnect wiring 5. Remove and dispose of old water heater 6. Install tank stand or plumb to the floor (do not include cost of stand) 7. Install new water heater o Include 2 new water flex, 1 gas flex & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank 12. Fire off unit, check combustion and firing rate o Check combustion of furnace if common venting used 13. Set temperature and check all controls 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with owner	1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open loop systems 7. Code upgrades o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier post o Water alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Relighting other appliances, if fuel line removed past G valve
EQUIPMENT	Equipment	1. Source Equipment to meet above specification 2. Warehouse & inventory management 3. Provide warranty management	
STANDARD MAINTENANCE	Standard Maintenance	1. Inspect ignition system and safety controls—clean and adjust as needed 2. Inspect burner assembly—clean and adjust as needed 3. Inspect flue system—check for proper attachment to the water heater, any disconnected sections, and for signs of corrosion 4. Check gas pressure and adjust as necessary 5. Inspect for gas leaks 6. Test (TPR) temperature-pressure-release valve 7. Check the anode rod 8. Drain the tank and flush out sediment 9. Fill tank 10. Check temperature and adjust to 120 degrees as necessary 11. Inspect control box, associated controls, wiring and connections 12. Inspect for water leaks 13. Check all safety operations 14. Clean site 15. Discuss service with owner	N/A

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Thermal Efficiency	Product Capabilities	Standard Installation (Flat Rate)	Standard Maintenance-Annual (Flat Rate)	Repair & Service (Hourly labor rate)
Commercial	Water Heat	Tank Style	Electric	50	> 0.95		ANS/CEA-2045* or proprietary Modular Communications Interface (MCI) socket			
Commercial	Water Heat	Tank Style	Electric	75	> 97		ANS/CEA-2045* or proprietary Modular Communications Interface (MCI) socket			

* CEA-2045 socket

Costs Category	Components	What should be included in flat rates	What should be excluded from flat rates, or considered as a
STANDARD INSTALLATION	Site Check	<ol style="list-style-type: none"> Verify installation will meet code Draft work order for installation Schedule installation date Secure customer signature on PSE form(s) 	N/A
	Permit Handling	<ol style="list-style-type: none"> Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time — where applicable 	N/A
	Standard Installation	<ol style="list-style-type: none"> Shut off power Disconnect wiring Check inlet water pressure Remove and dispose of old water heater Install tank stand or plumb to the floor (do not include cost of stand) Install new water heater Include 2 new water flex Connect wiring with 2 new wire nuts Fill tank Set temperature and check all controls Check all safety operations Clean site Discuss installation and operation with owner 	<ol style="list-style-type: none"> Crawl space or attic installation Relocation of water heater Relocation of plumbing lines Open loop systems Code upgrades <ul style="list-style-type: none"> Expansion tank Drip pan Earthquake straps & 2x4 bracing Barrier post Water Alarm Relief line
EQUIPMENT	Equipment	<ol style="list-style-type: none"> Source Equipment to meet above specification Warehouse & inventory management Provide warranty management 	<ol style="list-style-type: none"> Note above
STANDARD MAINTENANCE	Standard Maintenance	<ol style="list-style-type: none"> Test (TPR) temperature-pressure-release valve Check the anode rod Drain the tank and flush out sediment Fill tank Check temperature and adjust to 120 degrees as necessary Inspect control box, associated controls, wiring and connections Check for water leaks Check all safety operations Clean site Discuss service with owner 	

Application	Category	Type	Fuel	Size (gal.)	Energy Factor	Thermal Efficiency	Product Capabilities	Equipment Cost (Flat Rate)	Make (Brand)	Model	Warranty Term (Years)
Commercial	Water Heat	Tank Style	Electric	50	> 0.95		ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket				
Commercial	Water Heat	Tank Style	Electric	75		> 0.7	ANSI/CEA-2045* or proprietary Modular Communications Interface (MCI) socket				

REDACTED VERSION

From: LeaseBid -- mail --
Sent: Friday, May 22, 2015 12:20 PM
To: LeaseBid -- mail --
Subject: PSE New Lease Program
Attachments: Puget Sound Energy Leasing Platform Executive Summary.pdf; PSE_NDAMay2015.pdf

Dear Tier 1 Contractor Alliance Network HVAC Partners,

We are excited to introduce a new business opportunity for your consideration. Over the past year PSE has validated a general leasing platform and has developed a detailed business plan focused on deploying a comprehensive energy equipment leasing offer to its customers. PSE believes that by introducing a lease option, the existing market will grow. Since you represent the values PSE strives for in delivering safe, dependable and efficient products and services to its customers, we'll need your help to meet this new demand.

PSE is currently building out this leasing platform, which includes securing regulatory approval and building back office processes and capabilities. A critical component to help inform those activities is validating current market costs for fulfilment services (installation/maintenance/service); see the attached Executive Summary document for high level details on the platform design and capabilities.

In the coming weeks, PSE intends to issue a Request for Quotation (RFQ) to all interested Tier 1 CAN HVAC partners to provide a platform in which interested parties can submit its current rates for service. This RFQ will include more finite details regarding service level expectations, as well as an outline of in vs. out of scope activities to better assist bidders in estimating costs. This would then inform and lead to a contracted service agreement with the successful bidder(s).

If you would like to be considered as a potential bidder for this initial RFQ, please click on the following link LeaseBid@pse.com and acknowledge your interest by **3pm Wednesday May 27th, 2015**. Make sure to include in the body of your email response, the following details:

- Company Name
- Contact Name
- Contact Email
- Contact Phone

NOTE: The attached Non-Disclosure Agreement (NDA) is to be printed, signed, scanned and returned with your email in order to receive additional information and the RFQ.

Again, thank you for your continued partnership and consideration.

Sincerely,
PSE Lease Program Selection Team



Leasing Platform Executive Summary

Introduction

Puget Sound Energy (PSE) is Washington state’s oldest local energy utility, serving 1.1 million electric customers and 770,000 natural gas customers in 10 counties.

Over the past year PSE has validated a general leasing platform and has developed a detailed business plan focused on deploying a comprehensive equipment leasing platform.

Guiding Principles

- Increase customer choice
- Stimulate energy efficient product installations
- Expand business with our partners
- Flexibility to serve an evolving energy market

Customer Choice

In order to create a suite of products that allow for a successful launch, we first analyzed the existing market conditions for residential and commercial space heat and water heat equipment.

Additionally, it was important to understand our customers’ expectations regarding what should be included in the lease offer and how it can help deliver energy savings. The following outlines the market and customer metrics generated during the development phase.

Market Analysis

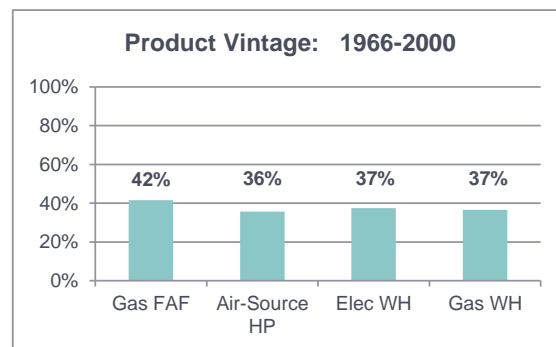
- 70% of PSE’s single-family residential customers use gas forced-air furnaces or air-source heat pumps to heat their homes
- In Washington State 97% of single-family residential water heat equipment is tank-style; 60% of PSE customers use natural gas to heat their water while 35% use electricity.
- In the commercial market 80% of PSE customers also use self-contained water heaters, and the largest sector within that is tank-style; both natural gas (42%) and electricity (54%) are used for fuel.

Market Potential

Focused on products detailed in our market analysis, and assuming a useful life of 18 years for heating

equipment and 14 years for water heating equipment, it is estimated there are approximately 50,000 HVAC and 87,000 water heater replacements annually under normal market conditions.

In addition, a review of regionally installed equipment suggests that many are exceeding the life expectancy.



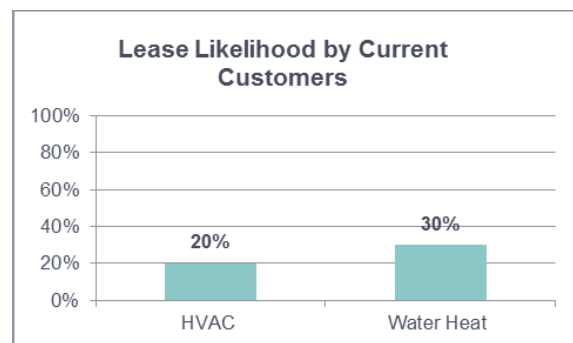
Source: 2012 Northwest Energy Efficiency Alliance Regional Building Stock Assessment

PSE believes, as a result of customer research, that by introducing a leasing option into the market, the market potential could grow between 5-10%.

Customer Insights

To determine potential participation in a lease offer, customers were provided a scenario regarding a lease package, and asked how likely they would be to lease.

As summarized below between 20-30% of customers expressed an interest in a lease offering.

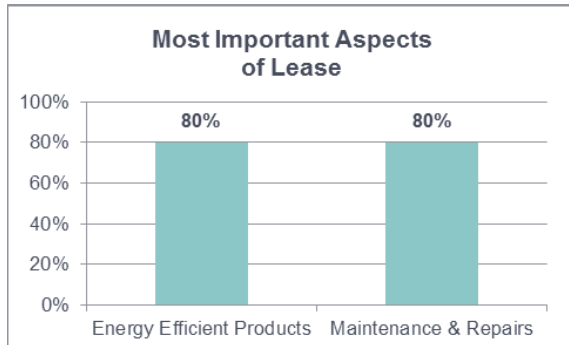


Source: PSE residential lease HVAC survey, (n = 805), PSE residential lease WH survey (n=797)



Leasing Platform Executive Summary

In addition, clearly the most important aspects of the lease package were access to higher efficiency equipment and the peace of mind provided by the inclusion of maintenance and repair.



Source: PSE residential lease HVAC survey, (n = 805), PSE residential lease WH survey (n=797)

Lease Components

In order to provide a best-in-class customer experience, it is critical to match the product offering with customer expectations. Based on market research and customer surveys, the lease offer will be structured to provide the below components:

- Energy efficient equipment choices
- Inclusive maintenance and repairs
- 24 hour customer service
- 24-48 hour service window
- Ability to transfer the lease when the property is sold

Market Forecast

Given the market analysis, PSE’s forecast for leased units is as follows:

Annual Steady State Installations (units)	
Residential Gas Furnace	2,860
Residential Heat Pump	208
Residential Water Heater	3,277
Commercial Water Heater	149

Over a 5 year period, growth is expected to reach 27,000 units.

Cumulative Leased Units

Year 1	Year 2	Year 3	Year 4	Year 5
2,480	8,207	14,701	21,195	27,689

Product Portfolio

The leasing platform is intended to enable evolution to additional products as the market and technology deem appropriate.

	Launch Products	Possible Expansion
Residential HVAC	Gas forced air furnace Air-source heat pump	Ductless heat pump A/C
Commercial HVAC		Packaged heat/DX cooling Boiler/chiller Boiler
Residential WH	Gas tank-style Electric tank-style	Gas tankless Electric heat pump Boiler
Commercial WH	Gas tank-style Electric tank-style	Boiler Boiler with storage tank
Additional Product Lines		Solar Generators EV equipment Storage/Batteries ...



Leasing Platform Executive Summary

Expand Business with our Partners

The leasing platform was developed to accommodate the full leasing program value chain: Acquisition, Financing, Fulfillment, Administration, Servicing, and Termination; with PSE staff and through strategic partnerships, as broadly outlined below.

Promotion through PSE

- PSE carries cost of acquisition; Marketing, intake, eligibility screening, credit check & lease agreement

Capital expenditure relief

- Equipment procurement and distribution costs managed by PSE

Steady business for partners

- Contracted installation
- Repeat service and repair activities

Transparent, fair and accountable partnership

- Defined eligibility criteria
- Open bidding process
- Unbiased assessment
- Contracted pricing
- Impartial job allocation model
- Clear performance expectations

Partner Selection

As PSE Tier 1 Contractor Alliance Network partners have already demonstrated competency, understand working with PSE and our systems, and represent the values PSE strives for in delivering safe, dependable and efficient products and services to our customers, PSE intends to utilize an RFP process to provide a fair and equitable platform in which interested parties can submit proposals for participation.

Service Level Agreement Criteria

Equipment Partners

- Negotiate and support equipment warranties with OEMs
- Stock and store all equipment models, sizes, efficiencies and quantities specified
- Provide just-in-time equipment distribution to PSE contracted fulfillment partners

- Notify PSE of any equipment price adjustments, including implementing automatic OEM price reductions
- Own all inventory until installation is verified by PSE
- Assume responsibility for all equipment defects or services under warranty, but allow for PSE personnel or subcontracted personnel to carry out warranty repairs

Fulfillment Partners

- Demonstrate existing Tier 1 status in PSE Contractor Alliance Network
- Document Commercial and/or General Liability as well as Commercial Automobile Liability of \$2MM per occurrence
- Document and maintain all required licenses, permits, and authorizations necessary to carry on its business, including a valid Washington state contractor license and Washington state business license, as applicable.
- Provide 24/7 customer service phone line
- Install and service our product portfolio
- Provide warranties for labor and parts not covered under OEM warranty
- Agree to specific service and maintenance fees
- Maintain all appropriate certifications
- Participate in any equipment or PSE designated training
- Adhere to specific supplemental work agreements

Both equipment and Fulfillment

- Be willing to undergo PSE process and systems training and testing
- Be willing to undergo strict performance reviews and QA/QC measures as detailed in the RFP and understand and accept consequences for non-compliance

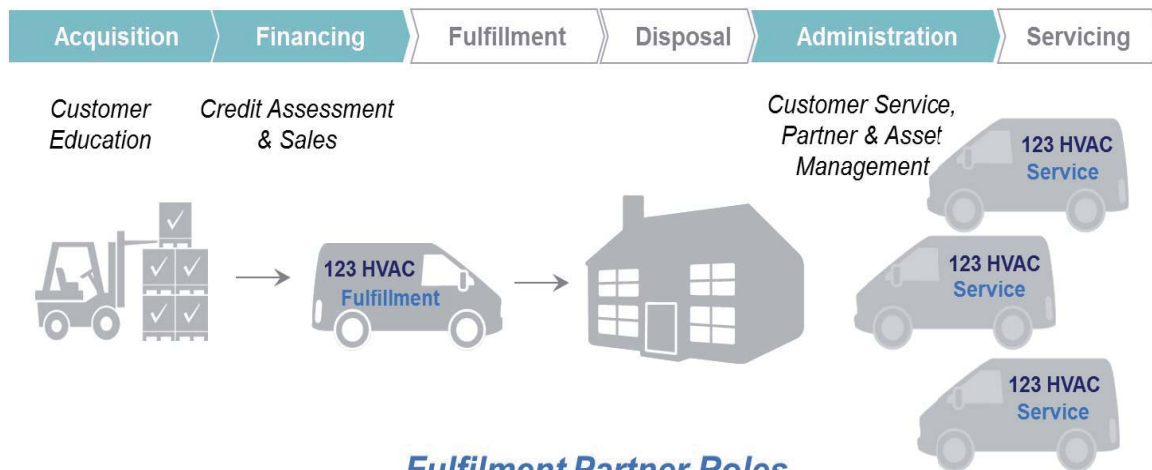


Leasing Platform Executive Summary

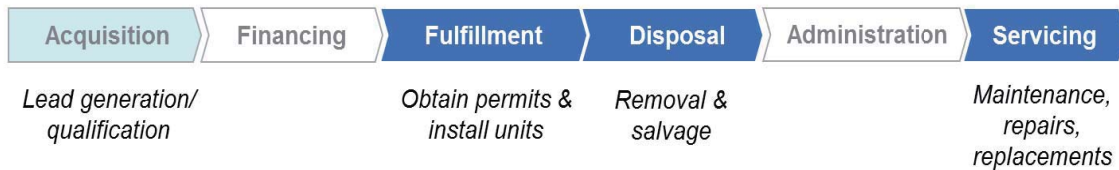
Field Operating Model

To effectively deliver a comprehensive lease offer, expanding the existing market, PSE will engage its valued trade partners to facilitate the equipment distribution and in-home fulfillment tasks, including pre-installation site checks, permitting, installation, maintenance and service. PSE's processes will ensure that the partner who performs the initial site check will be the same partner responsible for the equipment through installation, maintenance, and service. This promotes a greater sense of continuity from the customer's perspective while simultaneously increasing the potential for repeat business for our trade partners.

PSE Roles



Fulfilment Partner Roles





MUTUAL NONDISCLOSURE AGREEMENT

Puget Sound Energy, Inc. a Washington corporation with offices at 10885 NE 4th St., Bellevue, WA ("PSE") and the "Other Party" identified on the signature page below are considering a business transaction (the "Transaction"). In connection with the proposed Transaction, the parties are willing to disclose confidential information to each other on the terms and conditions stated in this agreement (this "Agreement").

The parties, intending to be legally bound, agree that:

I. Confidentiality.

1. In connection with the Transaction, each party (a "Disclosing Party") is prepared to make available to the other party (a "Receiving Party") certain Confidential Information regarding the Disclosing Party's business. The Receiving Party agrees to keep such information confidential, and protect all Confidential Information from disclosure by using the highest practical degree of care and at least the same care the Receiving Party uses to protect its own confidential information.

2. "Confidential Information" means: (i) any and all information with respect to the status of or the terms of the Transaction, and (ii) any trade secrets or other confidential or proprietary information of the Disclosing Party, whether of a technical, business or other nature (including, without limitation, the relationship between the parties, and information relating to the Disclosing Party's technology, software, products, services, designs, methodologies, know how, business plans, finances, marketing plans, customers, employees, prospects or other affairs). Confidential Information also includes any information that has been made available to the Disclosing Party by third parties that the Disclosing Party is obligated to keep confidential.

3. Receiving Party may not disclose Confidential Information to third parties; provided, however, that notwithstanding the foregoing, Receiving Party may disclose Confidential Information to its employees, consultants, advisors, or other agents (its "Representatives") only to the extent necessary for such Representatives to assist the Receiving Party in evaluating the Transaction, provided that such Representatives agree to keep such Confidential Information confidential in accordance with this Agreement. A breach of this Agreement by a Representative of Receiving Party will be deemed a breach by the Receiving Party, and Receiving Party agrees, at its sole expense, to take all reasonable measures (including but not limited to court proceedings) to restrain its Representatives from prohibited or unauthorized disclosure of the Confidential Information. Receiving Party shall immediately notify Disclosing Party of any actual, probable or reasonably suspected disclosure or unauthorized access to the Disclosing Party's Confidential Information.

4. Receiving Party will not use or allow others to use Confidential Information for any purpose other than evaluating the Transaction.

5. At Disclosing Party's request, Receiving Party will return all materials furnished by Disclosing Party that contain Confidential Information and will destroy or deliver to Disclosing Party any other materials containing Confidential Information, including materials prepared by Receiving Party, unless such Confidential Information is required to be retained by the Receiving Party to comply with applicable law, regulatory requirements or internal document retention policies. Notwithstanding the foregoing, the parties acknowledge that Receiving Party's computer systems may automatically back-up and retain electronic copies of the Confidential Information. To the extent that such systems create copies of the Confidential Information, the Receiving Party may retain such copies in its archival or back-up computer storage. If the Receiving Party retains a copy of any Confidential Information for any reason, including copies on electronic

backup media, then such information shall in all respects remain subject to the terms and conditions of this Agreement.

6. The provisions of this Part I shall not apply to Confidential Information that: (a) is or becomes publicly available through no fault of Receiving Party; (b) is or has been received in good faith by Receiving Party without restriction on use or disclosure from a third party having no obligation of confidentiality to Disclosing Party; or (c) is or has been independently developed by Receiving Party without reference to Confidential Information received from Disclosing Party, as evidenced by Receiving Party's written records.

7. The fact that portions of Confidential Information may be publicly available or otherwise not subject to this Agreement will not affect Receiving Party's obligations with respect to the remaining portion.

8. If Receiving Party is required by judicial or administrative process to disclose Confidential Information, Receiving Party shall promptly notify Disclosing Party and allow Disclosing Party a reasonable time to oppose such process. If disclosure is nonetheless required, Receiving Party may disclose only the Confidential Information that, in the written opinion of counsel acceptable to Disclosing Party, Receiving Party is legally required to disclose. Receiving Party shall use its best efforts to limit the dissemination of Confidential Information that is disclosed.

9. This Agreement will not apply to information disclosed to Receiving Party after Receiving Party receives written notice from Disclosing Party that further disclosures will not be treated as confidential.

10. In providing Confidential Information pursuant to this Agreement, Disclosing Party makes no representation, either express or implied, as to adequacy, sufficiency, or freedom from fault of such Confidential Information and incurs no responsibility nor obligation whatsoever by reason thereof; and the furnishing of such Confidential Information will not convey any rights or license with respect to such Confidential Information.

II. No Commitment to Enter Into Transaction. The parties acknowledge that nothing in this Agreement is intended to create or constitute any agency or partnership among the parties, or any legally binding obligation for either party to enter into, or negotiate to enter into, the Transaction.

III. Miscellaneous.

1. This Agreement shall continue in full force and effect for two (2) years from the Effective Date, unless terminated earlier or extended by mutual agreement of the parties.

2. In the event of a default under this Agreement, the non-breaching party will be entitled to injunctive relief, without posting bond, in addition to any other available remedies, including damages. In any litigation concerning this Agreement, the prevailing party will be entitled to recover all reasonable expenses of litigation, including reasonable attorney fees at trial and on any appeal.

3. Any failure by a party to enforce another party's strict performance of any provision of this Agreement will not constitute a waiver of its right to subsequently enforce such provision or any other provision of this Agreement.

4. This Agreement will be governed by and construed and enforced in accordance with the internal laws of the state of Washington, without regard to contrary principles of conflicts of law. The federal and state courts within the State of Washington shall have exclusive jurisdiction to adjudicate any dispute arising out of and relating to this Agreement. Venue for purposes of any litigation arising under this Agreement will be in King County, Washington.

5. All additions or modifications to this Agreement must be in writing and executed by all parties.

EFFECTIVE DATE: May 22, 2015

Puget Sound Energy, Inc.
Authorized Signature: Charlotte Lawson
Name: Charlotte Lawson
Title: Manager, Procurement
Date: May 22, 2015

Other Party:
Authorized Signature:
Name:
Title:
Date:

From: LeaseBid -- mail --
Sent: Friday, May 29, 2015 1:57 PM
To: LeaseBid -- mail --
Subject: PSE New Lease Program
Attachments: PSE WHHVAC-Request for Quals+Rate Sheet.doc; Procurement RFQ Matric Exhibit A.xlsx; Lease Bid NDA, Exhibit B.pdf; Exhibit C.zip; PSE Trade Ally Service Zones, Exhibit D.pdf

Greetings Interested Parties,

On May 22, 2015, PSE submitted to your company an overview of the new lease program and asked for interest in participation in the bid process. The time has arrived to provide the details of the work scopes and request that pricing be provided. Below is a brief description of the attached documents:

1. Request for Qualifications – The document that describes the information that PSE would like to receive from your company. The schedule of events is also listed to allow the bidders to plan the resources to prepare the response.
2. Exhibit A is the pricing sheet to be completed and returned.
3. Exhibit B is the Non-Disclosure Agreement to be signed and returned if not already submitted with the request for interest response.
4. Exhibit C is a folder that includes six specific work scopes for the types of material to be installed.
5. Exhibit D provides the territorial zones to be included in the service provided by the supplier.

As per the instructions in the RFQ attached, all questions are to be submitted via email to this email address to be addressed per the documented schedule. PSE looks forward to receiving your questions to enable clarification for all bidders, which will allow PSE to evaluate the responses equally.

Thank you for your interest in supporting PSE with the decisions to be made concerning the new lease program.

Sincerely,
PSE Lease Program Selection Team



REQUEST FOR QUALIFICATIONS AND RATE SHEET

Project: Energy Equipment Leasing

Statement of Need:

Puget Sound Energy, Inc. (PSE) is in need of expert resources to assist in PSE's new Leasing Program, specifically in the area of product installation and maintenance services for residential and commercial gas and electric water heaters and residential gas forced air furnaces and electric air-source heat pumps. PSE's existing program includes residential and commercial gas water heaters and the new program is designed to incorporate providing those products as well as expanding to add electric water heaters and electric and gas heating products.

Those firms, who meet the minimum qualifications to provide expert and supplemental resources, will be named Preferred Suppliers for the duration of this project. PSE will retain overall responsibility for the approach and project management control, and scheduling expert resources as needed. However, as well-defined specifications and scopes of work and other deliverables are identified, PSE will invite Preferred Suppliers to provide quotes tied to firm work commitments. Selection for awarded suppliers will be weighted toward the quality of business practices, value of service, and personnel performing as expert resources as well as the firm's commitment to a dependable, efficient result.

Evaluation Criteria for this Response:

The focus of PSE's evaluation will be on the relevant qualifications of your firm and available personnel with depth of relevant experience commensurate to the firm's billing rates. PSE will review referenced resources to assess qualifications. Relevant experience includes:

- PSE Tier 1 status in PSE Contractor Alliance Network
- Certified technical knowledge and experience for installation, maintenance, repair, replacement and disposal services
- Document Commercial and/or General Liability as well as Commercial Automobile Liability of \$2MM per occurrence
- PSE territory coverage
- Proven experience on similar projects in the utility industry
- Inventory management
- Provide 24/7 customer service phone line
- Warranty for labor and parts not covered under OEM warranty
- WA State Contractors and Business licenses
- Safety certifications
- Complete customer service calls within 24 hours of customer request
- Complete customer site inspections/installations within 48 hours of customer acceptance

Submittal Instructions for this Response:

This Request is by PSE’s invitation only. Responses from firms not expressly invited by PSE will not be considered. A responsive reply to this Request will include:

- Completed Pricing Sheet, Exhibit A, or Competitive Rate Sheet
 - Pricing should be based on detail noted in Exhibit C
- Completed Non-Disclosure Agreement (NDA), Exhibit B

Do not include project approach documents or product sales collateral at this time.
Upon review of submittals received, PSE may contact any or all of the firms regarding clarifications, further information, or interview scheduling. PSE also reserves the right to contract with multiple firms to fulfill its resource needs under this Request.

Schedule:

Friday, May 22, 2015	Request e-mailed to firms
Wednesday, May 27, 2015	Intent to Respond and Signed NDA Returned
Friday, May 29, 2015	Request for Qualifications e-mailed to firms
Monday, June 8, 2015	Questions/Comments from Bidders Due, if any
Thursday, June 11, 2015	PSE Responses to Questions/Comments Due
Friday, June 26, 2015	Response to Request for Qualifications Due

Questions:

The release of the RFQ begins a quiet period for Bidders participating in this project. Bidders should not call PSE employees with the intent of discussing the project or asking questions regarding the RFQ.

However, we realize it is critical to provide Bidders with a vehicle to ask questions so that quality responses can be prepared. Responses to all questions will be provided in writing to all Bidders without identifying which company posed the question. The last date for question submittal to LeaseBid@pse.com is found above in the Schedule.

Submit RFQ responses electronically by end of business Friday, June 26, 2015 to:

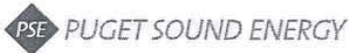
LeaseBid@pse.com

Exhibits:

- A. Pricing Sheet
- B. PSE signed NDA for countersignature
- C. Standard versus supplemental project scopes
- D. CAN zones list

Existing Equipment	Replacement Equipment	Site Check (flat cost)	Permit Handling Fee (flat cost)	Standard Installation (flat cost)	Maintenance - Annual (flat cost)	Repair & Service (Hourly labor rate)	PSE zones served	Brands Served
Commercial Water Heaters	Gas Tank-Style Water Heater							
	75-100 Gallon code compliant unit							
	80 Gallon code compliant unit							
	Electric Tank-Style Water Heater							
Residential Water Heaters	75-100 Gallon code compliant unit							
	Gas Tank-Style Water Heater							
	50 Gallon code compliant unit	N/A						
	50 Gallon code compliant unit	N/A						
	50 Gallon code compliant unit	N/A						
	Electric Tank-Style Water Heater							
Residential HVAC	50 Gallon code compliant unit							
	Gas Forced-Air Furnace							
	up to 50K BTU code compliant unit							
	up to 50K BTU code compliant unit							
	up to 50K BTU code compliant unit							
	up to 50K BTU code compliant unit							
	up to 50K BTU code compliant unit							
	up to 50K BTU code compliant unit							
	up to 50K BTU code compliant unit							
	up to 50K BTU code compliant unit							
2.5 ton code compliant unit	Air Source Heat Pump							
	9.00 HSPF / up to 16.00 SEER / up to 2.5 tons							

Note: Competitive pricing requested is intended for budgetary purposes at this point and not for a contract or order commitment.



MUTUAL NONDISCLOSURE AGREEMENT

Puget Sound Energy, Inc. a Washington corporation with offices at 10885 NE 4th St., Bellevue, WA ("PSE") and the "Other Party" identified on the signature page below are considering a business transaction (the "Transaction"). In connection with the proposed Transaction, the parties are willing to disclose confidential information to each other on the terms and conditions stated in this agreement (this "Agreement").

The parties, intending to be legally bound, agree that:

I. Confidentiality.

1. In connection with the Transaction, each party (a "Disclosing Party") is prepared to make available to the other party (a "Receiving Party") certain Confidential Information regarding the Disclosing Party's business. The Receiving Party agrees to keep such information confidential, and protect all Confidential Information from disclosure by using the highest practical degree of care and at least the same care the Receiving Party uses to protect its own confidential information.

2. "Confidential Information" means: (i) any and all information with respect to the status of or the terms of the Transaction, and (ii) any trade secrets or other confidential or proprietary information of the Disclosing Party, whether of a technical, business or other nature (including, without limitation, the relationship between the parties, and information relating to the Disclosing Party's technology, software, products, services, designs, methodologies, know how, business plans, finances, marketing plans, customers, employees, prospects or other affairs). Confidential Information also includes any information that has been made available to the Disclosing Party by third parties that the Disclosing Party is obligated to keep confidential.

3. Receiving Party may not disclose Confidential Information to third parties; provided, however, that notwithstanding the foregoing, Receiving Party may disclose Confidential Information to its employees, consultants, advisors, or other agents (its "Representatives") only to the extent necessary for such Representatives to assist the Receiving Party in evaluating the Transaction, provided that such Representatives agree to keep such Confidential Information confidential in accordance with this Agreement. A breach of this Agreement by a Representative of Receiving Party will be deemed a breach by the Receiving Party, and Receiving Party agrees, at its sole expense, to take all reasonable measures (including but not limited to court proceedings) to restrain its Representatives from prohibited or unauthorized disclosure of the Confidential Information. Receiving Party shall immediately notify Disclosing Party of any actual, probable or reasonably suspected disclosure or unauthorized access to the Disclosing Party's Confidential Information.

4. Receiving Party will not use or allow others to use Confidential Information for any purpose other than evaluating the Transaction.

5. At Disclosing Party's request, Receiving Party will return all materials furnished by Disclosing Party that contain Confidential Information and will destroy or deliver to Disclosing Party any other materials containing Confidential Information, including materials prepared by Receiving Party, unless such Confidential Information is required to be retained by the Receiving Party to comply with applicable law, regulatory requirements or internal document retention policies. Notwithstanding the foregoing, the parties acknowledge that Receiving Party's computer systems may automatically back-up and retain electronic copies of the Confidential Information. To the extent that such systems create copies of the Confidential Information, the Receiving Party may retain such copies in its archival or back-up computer storage. If the Receiving Party retains a copy of any Confidential Information for any reason, including copies on electronic

backup media, then such information shall in all respects remain subject to the terms and conditions of this Agreement.

6. The provisions of this Part I shall not apply to Confidential Information that: (a) is or becomes publicly available through no fault of Receiving Party; (b) is or has been received in good faith by Receiving Party without restriction on use or disclosure from a third party having no obligation of confidentiality to Disclosing Party; or (c) is or has been independently developed by Receiving Party without reference to Confidential Information received from Disclosing Party, as evidenced by Receiving Party's written records.

7. The fact that portions of Confidential Information may be publicly available or otherwise not subject to this Agreement will not affect Receiving Party's obligations with respect to the remaining portion.

8. If Receiving Party is required by judicial or administrative process to disclose Confidential Information, Receiving Party shall promptly notify Disclosing Party and allow Disclosing Party a reasonable time to oppose such process. If disclosure is nonetheless required, Receiving Party may disclose only the Confidential Information that, in the written opinion of counsel acceptable to Disclosing Party, Receiving Party is legally required to disclose. Receiving Party shall use its best efforts to limit the dissemination of Confidential Information that is disclosed.

9. This Agreement will not apply to information disclosed to Receiving Party after Receiving Party receives written notice from Disclosing Party that further disclosures will not be treated as confidential.

10. In providing Confidential Information pursuant to this Agreement, Disclosing Party makes no representation, either express or implied, as to adequacy, sufficiency, or freedom from fault of such Confidential Information and incurs no responsibility nor obligation whatsoever by reason thereof; and the furnishing of such Confidential Information will not convey any rights or license with respect to such Confidential Information.

II. No Commitment to Enter Into Transaction. The parties acknowledge that nothing in this Agreement is intended to create or constitute any agency or partnership among the parties, or any legally binding obligation for either party to enter into, or negotiate to enter into, the Transaction.

III. Miscellaneous.

1. This Agreement shall continue in full force and effect for two (2) years from the Effective Date, unless terminated earlier or extended by mutual agreement of the parties.

2. In the event of a default under this Agreement, the non-breaching party will be entitled to injunctive relief, without posting bond, in addition to any other available remedies, including damages. In any litigation concerning this Agreement, the prevailing party will be entitled to recover all reasonable expenses of litigation, including reasonable attorney fees at trial and on any appeal.

3. Any failure by a party to enforce another party's strict performance of any provision of this Agreement will not constitute a waiver of its right to subsequently enforce such provision or any other provision of this Agreement.

4. This Agreement will be governed by and construed and enforced in accordance with the internal laws of the state of Washington, without regard to contrary principles of conflicts of law. The federal and state courts within the State of Washington shall have exclusive jurisdiction to adjudicate any dispute arising out of and relating to this Agreement. Venue for purposes of any litigation arising under this Agreement will be in King County, Washington.

5. All additions or modifications to this Agreement must be in writing and executed by all parties.

EFFECTIVE DATE: May 29, 2015

Puget Sound Energy, Inc.

Authorized Signature: [Handwritten Signature]

Name: Jill R. Larson, MBA, CPSM

Title: Senior Buyer

Date: May 29, 2015

Other Party: _____

Authorized Signature: _____

Name: _____

Title: _____

Date: _____

Commercial Electric Water Heater Replacement

Cost component	What should be considered standard	What should be considered supplemental
Site Check	<ol style="list-style-type: none"> 1. Verify installation will meet code 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s) 	N/A
Permit	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 	N/A
Installation	<ol style="list-style-type: none"> 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Install tank stand or plumb to the floor (do not include cost of stand) 6. Install new water heater <ul style="list-style-type: none"> o Include 2 new water flex 7. Connect wiring with 2 new wire nuts 8. Fill tank 9. Set temperature and check all controls 10. Check all safety operations 11. Clean site 12. Discuss installation and operation with owner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Open loop systems 5. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier post o Water Alarm o Relief line
Standard Maintenance	<ol style="list-style-type: none"> 1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Drain the tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with owner 	N/A

Commercial Gas Water Heater Replacement

Cost component	What should be considered standard	What should be considered supplemental
Site Check	<ol style="list-style-type: none"> 1. Verify installation will meet code (venting, combustion air, gas pipe, clearances, etc.) 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s) 	
Permit	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 	
Installation	<ol style="list-style-type: none"> 1. Shut off power 2. Shut off gas line and disconnect 3. Check inlet water pressure 4. Disconnect wiring 5. Remove and dispose of old water heater 6. Install tank stand or plumb to the floor (do not include cost of stand) 7. Install new water heater <ul style="list-style-type: none"> o Include 2 new water flex, 1 gas flex & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank 12. Fire off unit, check combustion and firing rate <ul style="list-style-type: none"> o Check combustion of furnace if common venting used 13. Set temperature and check all controls 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with owner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open loop systems 7. Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier post o Water alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Relighting other appliances if fuel line removed past G valve

Commercial Gas Water Heater Replacement

<p style="text-align: center;">Standard Maintenance</p>	<ol style="list-style-type: none">1. Inspect ignition system and safety controls—clean and adjust as needed2. Inspect burner assembly—clean and adjust as needed3. Inspect flue system—check for proper attachment to the water heater, any dislocated sections, and for signs of corrosion4. Check gas pressure and adjust as necessary5. Inspect for gas leaks6. Test (TPR) temperature-pressure-release valve7. Check the anode rod8. Drain the tank and flush out sediment9. Fill tank10. Check temperature and adjust to 120 degrees as necessary11. Inspect control box, associated controls, wiring and connections12. Inspect for water leaks13. Check all safety operations14. Clean site15. Discuss service with owner	
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Residential Electric Water Heater Replacement

Cost component	What should be considered standard	What should be considered supplemental
Permit	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 	<p>N/A</p>
Installation	<ol style="list-style-type: none"> 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Install tank stand or plumb to the floor (do not include cost of stand) <ul style="list-style-type: none"> o Include 2 new water flex 6. Install new water heater <ul style="list-style-type: none"> o Include 2 new water flex 7. Connect wiring with 2 new wire nuts 8. Fill Tank 9. Set temperature and check all controls 10. Check all safety operations 11. Clean site 12. Discuss installation and operation with homeowner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Open loop systems 5. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier Post o Water Alarm o Relief line
Standard Maintenance	<ol style="list-style-type: none"> 1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Drain the tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with homeowner 	<p>N/A</p>

Residential Gas Furnace Replacement

Cost component	What should be considered standard	What should be considered supplemental
Site Check	<ol style="list-style-type: none"> 1. Perform heat loss & Manual J calculations 2. Take material measurement 3. Verify installation will meet code (venting, combustion air, gas pipe, clearances, etc.) 4. Draft work order for installation 5. Schedule installation date 6. Secure customer signature on PSE form(s) 	N/A
Permit	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 	N/A
Installation	<ol style="list-style-type: none"> 1. Conduct duct blaster 2. Shut off power 3. Shut off gas line and disconnect 4. Disconnect 115 v and 24 V wiring 5. Remove and dispose of old furnace 6. Design and build transitions 7. Cut sheet metal to transition points 8. Install furnace 9. Install new sheet metal, filter channel and standard filtration system 10. Seal internal and external joints 11. Install and/or reconnect venting 12. Hook up, inspect and test fuel line 13. Hook up 115v wiring from J-box to furnace 14. Install fan switch or connect to t-stat 15. Hook up internal 24 v controls and t-stat 16. Fire off unit, check combustion and firing rate <ul style="list-style-type: none"> o Check combustion of water heater if common venting used) 17. Set fan speed, check all controls, run through heating cycle 18. Check all safety operations 19. Clean site 20. Review T-stat settings with customer to optimize their goals/system performance 21. Discuss installation and operation with homeowner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of furnace 3. Relocating gas line 4. Relocating venting over 5. Additional supply or return runs 6. Increasing duct size 7. Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o PVC/Condensate/ Condensate pump o Increasing gas line size per code o Securing gas line to code 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. T-stat relocation or rewiring installs 11. Installing new or smart t-stat 12. Advanced air filtration system 13. Controls add-ons (temperature/humidity sensor) 14. Cutting sheetrock 15. Relighting other appliances if fuel line removed past G valve 16. Whole house duct sealing 17. Air conditioning

Residential Gas Furnace Replacement

<p>Standard Maintenance</p>	<ol style="list-style-type: none"> 1. Inspect, clean and lubricate blower assembly (includes blower housing, blower wheel and motor) 2. Check combustion blower housing for lint and debris and clean as necessary 3. Inspect drain pan and condensate drain lines. Clean as needed 4. Test condensate pump 5. Check gas pressure and adjust as necessary 6. Inspect for gas leaks 7. Inspect burner assembly—clean and adjust as needed 8. Inspect ignition system and safety controls—clean and adjust as needed 9. Inspect heat exchanger or heating elements 10. Inspect flue system—check for proper attachment to the furnace, any dislocated sections, and for signs of corrosion. 11. Check Amp draw 12. Inspect control box, associated controls, wiring and connections 13. Clean or replace air filters 14. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 15. Check temperature rise 16. Check all safety operations 17. Discuss service with homeowner 	<p>N/A</p>
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Residential Gas Water Heater Replacement

Cost component	What should be considered standard	What should be considered supplemental
Permit	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 	
Installation	<ol style="list-style-type: none"> 1. Shut off power 2. Shut off gas line and disconnect 3. Check inlet water pressure 4. Disconnect wiring 5. Remove and dispose of old water heater 6. Install tank stand or plumb to the floor (do not include cost of stand) 7. Install new water heater <ul style="list-style-type: none"> o Include 2 new water flex, 1 gas flex & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank 12. Fire off unit, check combustion and firing rate <ul style="list-style-type: none"> o Check combustion of furnace if common venting used 13. Set temperature and check all controls 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with homeowner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open loop systems 7. Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier Post o Water Alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Relighting other appliances if fuel line removed past G valve

Residential Gas Water Heater Replacement

<p style="text-align: center;">Standard Maintenance</p>	<ol style="list-style-type: none">1. Inspect ignition system and safety controls—clean and adjust as needed2. Inspect burner assembly—clean and adjust as needed3. Inspect flue system—check for proper attachment to the water heater, any dislocated sections, and for signs of corrosion4. Check gas pressure and adjust as necessary5. Inspect for gas leaks6. Test (TPR) temperature-pressure-release valve7. Check the anode rod8. Drain the tank and flush out sediment9. Fill tank10. Check temperature and adjust to 120 degrees as necessary11. Inspect control box, associated controls, wiring and connections12. Inspect for water leaks13. Check all safety operations14. Clean site15. Discuss service with homeowner	
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Residential Heat Pump Replacement

Cost component	What should be considered standard	What should be considered supplemental
Site Check	<ol style="list-style-type: none"> 1. Perform heat loss & Manual J calculations 2. Take material measurement 3. Verify installation will meet code 4. Draft work order for installation 5. Schedule installation date 6. Secure customer signature on PSE form(s) 	N/A
Permit	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical & electrical) and associated labor and inspection time – where applicable 	N/A
Installation	<ol style="list-style-type: none"> 1. Conduct duct blaster 2. Shut off power 3. Disconnect wiring 4. Remove and dispose of old refrigerant and lines 5. Remove and dispose of old air handler and outdoor unit 6. Design and build transitions and fittings 7. Cut sheet metal to transition points 8. Install new air handler and indoor coil 9. Install new sheet metal, filter channel and standard filtration system 10. Seal internal and external joints 11. Install new outdoor unit 12. Install new R410A compatible refrigerant lines & refrigerant 13. Complete all electrical connections 14. Charge, inspect and test refrigerant lines 15. Check all controls, run through heating and cooling cycles 16. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 17. Check all safety operations 18. Cleanup 19. Discuss installation and operation with homeowner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of indoor air handler 3. Relocating outdoor unit 4. Pad for outdoor unit and ground prep 5. Relocating refrigerant line 6. Additional supply or return runs 7. Increasing duct size 8. Code upgrades <ul style="list-style-type: none"> o Outdoor thermostat & lockout o Condensate/ Condensate pump 9. T-stat relocation or rewiring installs 10. Installing new or smart t-stat 11. Advanced air filtration system 12. Sound Blanket for outdoor coil 13. Hard Start Kit 14. Whole house duct sealing

Residential Heat Pump Replacement

<p>Standard Maintenance</p>	<p>Indoor Unit</p> <ol style="list-style-type: none"> 1. Inspect and clean blower assembly (includes blower housing, blower wheel and motor) 2. Inspect evaporator coil, drain pan and condensate drain lines. Clean as needed 3. Test condensate pump 4. Inspect refrigerant lines and connection 5. Check Amp draw 6. Inspect control box, associated controls, wiring and connections 7. Clean or replace air filters 8. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 9. Check all safety operations <p>Outdoor Unit</p> <ol style="list-style-type: none"> 1. Inspect unit for proper refrigerant level and adjust if necessary 2. Clean dirt, leaves and debris from inside cabinet 3. Inspect base pan for restricted drain openings -remove obstructions as necessary 4. Inspect coil and cabinet - clean as needed 5. Inspect fan motor and fan blades for wear and damage - lubricate as needed 6. Check outdoor temperature sensors 7. Inspect control box, associated controls/accessories, wiring and connections. Controls may include contactors, relays, circuit boards, capacitors, sump heat and other accessories. All control box and electrical parts should be checked for wear or damage. 8. Inspect compressor and associated tubing for damage 9. Check all safety operations 10. Discuss service with homeowner 	<p>N/A</p>
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Puget Sound Energy Trade Ally Service Zones

Zone	City	Zip Code	Zone	City	Zip Code
Zone #01	Toledo/Mossy Rock	98591	Zone #09	Kitsap Peninsula	98329
	Toledo/Mossy Rock	98596		Kitsap Peninsula	98332
Zone #02	Centralia	98531		Kitsap Peninsula	98335
Zone #03	Chehalis	98532		Kitsap Peninsula	98388
	Chehalis	98568	Zone #10	Federal Way/Auburn	98001
Zone #04	Little Rock/Bucoda	98530		Federal Way/Auburn	98003
	Little Rock/Bucoda	98576		Federal Way/Auburn	98023
	Little Rock/Bucoda	98579	Zone #11	Auburn/Black Diamond	98002
	Little Rock/Bucoda	98589		Auburn/Black Diamond	98010
Little Rock/Bucoda	98597	Auburn/Black Diamond		98047	
Auburn/Black Diamond		Auburn/Black Diamond		98051	
Zone #05	Olympia/Lacey	98501	Auburn/Black Diamond	98092	
	Olympia/Lacey	98502	Zone #12	Enumclaw	98022
	Olympia/Lacey	98503		Zone #13A	Seattle Metro North
	Olympia/Lacey	98506	Seattle Metro North		98102
	Olympia/Lacey	98512	Seattle Metro North		98103
	Olympia/Lacey	98513	Seattle Metro North		98104
Olympia/Lacey	98516	Seattle Metro North	98105		
Zone #06	Graham/Orting	98328	Seattle Metro North		98107
	Graham/Orting	98338	Seattle Metro North		98109
	Graham/Orting	98344	Seattle Metro North		98112
	Graham/Orting	98558	Seattle Metro North		98119
	Graham/Orting	98580	Seattle Metro North		98121
Zone #07	Puyallup/Lake Tapps	98321	Seattle Metro North	98122	
	Puyallup/Lake Tapps	98323	Seattle Metro North	98174	
	Puyallup/Lake Tapps	98360	Seattle Metro North	98195	
	Puyallup/Lake Tapps	98371	Seattle Metro North	98199	
	Puyallup/Lake Tapps	98372	Zone #13B	Seattle Metro South	98106
	Puyallup/Lake Tapps	98374		Seattle Metro South	98108
	Puyallup/Lake Tapps	98375		Seattle Metro South	98116
	Puyallup/Lake Tapps	98385		Seattle Metro South	98118
	Puyallup/Lake Tapps	98390		Seattle Metro South	98126
	Puyallup/Lake Tapps	98391		Seattle Metro South	98134
	Puyallup/Lake Tapps	98396		Seattle Metro South	98136
Zone #08	Tacoma Metro	98327		Seattle Metro South	98144
	Tacoma Metro	98354		Seattle Metro South	98178
	Tacoma Metro	98373		Zone #14	Greater Eastside
	Tacoma Metro	98387	Greater Eastside		98005
	Tacoma Metro	98402	Greater Eastside		98006
	Tacoma Metro	98403	Greater Eastside		98007
	Tacoma Metro	98404	Greater Eastside		98008
	Tacoma Metro	98405	Greater Eastside		98025
	Tacoma Metro	98406	Greater Eastside		98027
	Tacoma Metro	98407	Greater Eastside		98029
	Tacoma Metro	98408	Greater Eastside		98033
	Tacoma Metro	98409	Greater Eastside		98034
	Tacoma Metro	98416	Greater Eastside		98039
	Tacoma Metro	98418	Greater Eastside		98050
	Tacoma Metro	98421	Greater Eastside	98052	
	Tacoma Metro	98422	Greater Eastside	98053	
	Tacoma Metro	98424	Greater Eastside	98074	
	Tacoma Metro	98433	Greater Eastside	98075	
	Tacoma Metro	98439	Zone #14A	Kent/Maple Valley	98030
	Tacoma Metro	98443		Kent/Maple Valley	98031
	Tacoma Metro	98444		Kent/Maple Valley	98032
	Tacoma Metro	98445		Kent/Maple Valley	98038
	Tacoma Metro	98446		Kent/Maple Valley	98042
Tacoma Metro	98447	Zone #14B	Mercer Island	98040	
Tacoma Metro	98465		Zone #14C	Renton/Newcastle	98055
Tacoma Metro	98466	Renton/Newcastle		98056	
Tacoma Metro	98467	Renton/Newcastle		98057	
Tacoma Metro	98498	Renton/Newcastle		98058	
Tacoma Metro	98499	Renton/Newcastle		98059	

Puget Sound Energy Trade Ally Service Zones

Zone	City	Zip Code	Zone	City	Zip Code	
Zone #14D	Normandy Park-Sea Ta	98146	Zone #25	Skagit	98221	
	Normandy Park-Sea Ta	98148		Skagit	98232	
	Normandy Park-Sea Ta	98158		Skagit	98233	
	Normandy Park-Sea Ta	98166		Skagit	98235	
	Normandy Park-Sea Ta	98168		Skagit	98237	
	Normandy Park-Sea Ta	98188		Skagit	98238	
Zone #15	Snoqualmie/North Ben	98198	Skagit	98255		
	Snoqualmie/North Ben	98014	Skagit	98257		
	Snoqualmie/North Ben	98019	Skagit	98263		
	Snoqualmie/North Ben	98024	Skagit	98267		
	Snoqualmie/North Ben	98045	Skagit	98273		
Zone #16	Snoqualmie/North Ben	98065	Skagit	98274		
	Grotto/Skykomish	98224	Skagit	98283		
Zone #17	Grotto/Skykomish	98288	Skagit	98284		
	Northgate/Lake City	98115	Zone #26	Island	98236	
	Northgate/Lake City	98117		Island	98239	
	Northgate/Lake City	98125		Island	98249	
	Northgate/Lake City	98133		Island	98253	
	Northgate/Lake City	98155		Island	98260	
Northgate/Lake City	98177	Island		98277		
Zone #18	Bothell/Woodinville	98011	Zone #28	Kitsap County	98340	
	Bothell/Woodinville	98028		Kitsap County	98342	
	Bothell/Woodinville	98072		Kitsap County	98345	
	Bothell/Woodinville	98077		Kitsap County	98346	
Zone #19	Edmonds/Lynnwood	98012	Kitsap County	98364		
	Edmonds/Lynnwood	98020	Kitsap County	98370		
	Edmonds/Lynnwood	98021	Kitsap County	98392		
	Edmonds/Lynnwood	98026	Kitsap County	98383		
	Edmonds/Lynnwood	98036	Zone #28A	Kitsap County	98310	
	Edmonds/Lynnwood	98037		Kitsap County	98311	
	Edmonds/Lynnwood	98043		Kitsap County	98312	
	Edmonds/Lynnwood	98087		Kitsap County	98322	
Zone #20	Edmonds/Lynnwood	98275	Kitsap County	98337		
	Snohomish/Monroe	98205	Kitsap County	98353		
	Snohomish/Monroe	98258	Kitsap County	98359		
	Snohomish/Monroe	98272	Kitsap County	98366		
	Snohomish/Monroe	98290	Kitsap County	98367		
Zone #21	Snohomish/Monroe	98296	Kitsap County	98380		
	Gold Bar/Sultan	98251	Kitsap County	98386		
	Gold Bar/Sultan	98252	Kitsap County	98393		
Zone #22	Gold Bar/Sultan	98294	Zone #29	Kittitas	98926	
	Everett/Marysville	98201		Kittitas	98934	
	Everett/Marysville	98203		Kittitas	98946	
	Zone #23	Everett/Marysville	98204	Zone #29A	Upper Kittitas	98068
		Everett/Marysville	98208		Upper Kittitas	98922
		Everett/Marysville	98270		Upper Kittitas	98925
Everett/Marysville		98271	Upper Kittitas		98940	
Zone #24	Stanwood/Arlington	98223	Upper Kittitas	98941		
	Stanwood/Arlington	98282	Upper Kittitas	98943		
	Stanwood/Arlington	98292	Zone #30	Vashon Island	98013	
Zone #25	Whatcom	98220		Vashon Island	98070	
	Whatcom	98225	Zone #31	Bainbridge Island	98110	
	Whatcom	98226				
	Whatcom	98229				
	Whatcom	98230				
	Whatcom	98240				
	Whatcom	98244				
	Whatcom	98247				
	Whatcom	98248				
	Whatcom	98262				
	Whatcom	98264				
	Whatcom	98266				
	Whatcom	98276				
	Whatcom	98281				
	Whatcom	98295				

From: [REDACTED]
Sent: Wednesday, July 15, 2015 9:25 AM
To: LeaseBid -- mail --; McCulloch, Malcolm
Cc: Eric
Subject: Exhibit A: Lease program
Attachments: PSE Lease Program - Exhibit A.pdf

Please find attached the above referenced information. Feel free to contact us with questions.

Thank you,



From: LeaseBid -- mail -- [<mailto:LeaseBid@pse.com>]
Sent: Friday, July 10, 2015 1:13 PM
To: [REDACTED]
Cc: [REDACTED]
Subject: RE: Lease program



Thank you for your response. Below is a brief description of the attached documents:

1. Request for Qualifications – The document that describes the information that PSE would like to receive from your company. The schedule of events is also listed to allow the bidders to plan the resources to prepare the response.
2. **Exhibit A is the pricing sheet to be completed and returned.**
3. Exhibit B is the Non-Disclosure Agreement to be signed and returned if not already submitted with the request for interest response.
4. Exhibit C is a folder that includes six specific work scopes for the types of material to be installed.
5. Exhibit D provides the territorial zones to be included in the service provided by the supplier.
6. PSE Energy Equipment Lease RFQ Q&A installers

Your submittal should include item 2 above only, the other documents are for your reference to assist in your response. Thank you for your interest in supporting PSE with the decisions to be made concerning the new lease program.

Sincerely,
PSE Lease Program Selection Team

From: [REDACTED]
Sent: Friday, July 10, 2015 1:10 PM
To: McCulloch, Malcolm
Cc: [REDACTED]
Subject: Lease program

We have dug thru everything [REDACTED] has and cannot find the information regarding your program. If possible, can you send us what we need to get going on? We can have it done today or Monday.

Thanks,

[REDACTED]

From: [REDACTED]
Sent: Tuesday, July 07, 2015 8:51 AM
To: LeaseBid -- mail --
Subject: RE: PSE New Lease Program
Attachments: Procurement RFQ Matric Exhibit A.xlsx

Attached is the price sheet. I believe you already have NDA on file.
Let me know if you see any issues.

Thanks,



From: LeaseBid -- mail -- [<mailto:LeaseBid@pse.com>]
Sent: Monday, July 06, 2015 9:09 AM
To: [REDACTED]
Subject: RE: PSE New Lease Program

Yes, submission by Wednesday is fine. Please let us know if you need any further details.

Thank you,
PSE Lease Program Selection Team

From: [REDACTED]
Sent: Monday, July 06, 2015 9:02 AM
To: LeaseBid -- mail --
Subject: RE: PSE New Lease Program

Sorry for the delay. We should be able to get the bid in by Wednesday if that works?



From: LeaseBid -- mail -- [<mailto:LeaseBid@pse.com>]
Sent: Monday, July 06, 2015 8:51 AM
To: [REDACTED]
Subject: RE: PSE New Lease Program

Dear [REDACTED]

You returned the NDA form indicating interest in bidding on the lease program, however we do not receive your submission. Please let us know if additional time would allow your company to submit a bid.

Thank you,
PSE Lease Program Selection Team

From: [REDACTED]
Sent: Tuesday, May 26, 2015 4:07 PM
To: LeaseBid -- mail --
Subject: RE: PSE New Lease Program

[REDACTED]

[REDACTED]

From: LeaseBid -- mail -- [<mailto:LeaseBid@pse.com>]
Sent: Friday, May 22, 2015 12:20 PM
To: LeaseBid -- mail --
Subject: PSE New Lease Program

Dear Tier 1 Contractor Alliance Network HVAC Partners,

We are excited to introduce a new business opportunity for your consideration. Over the past year PSE has validated a general leasing platform and has developed a detailed business plan focused on deploying a comprehensive energy equipment leasing offer to its customers. PSE believes that by introducing a lease option, the existing market will grow. Since you represent the values PSE strives for in delivering safe, dependable and efficient products and services to its customers, we'll need your help to meet this new demand.

PSE is currently building out this leasing platform, which includes securing regulatory approval and building back office processes and capabilities. A critical component to help inform those activities is validating current market costs for

fulfilment services (installation/maintenance/service); see the attached Executive Summary document for high level details on the platform design and capabilities.

In the coming weeks, PSE intends to issue a Request for Quotation (RFQ) to all interested Tier 1 CAN HVAC partners to provide a platform in which interested parties can submit its current rates for service. This RFQ will include more finite details regarding service level expectations, as well as an outline of in vs. out of scope activities to better assist bidders in estimating costs. This would then inform and lead to a contracted service agreement with the successful bidder(s).

If you would like to be considered as a potential bidder for this initial RFQ, please click on the following link LeaseBid@pse.com and acknowledge your interest by **3pm Wednesday May 27th, 2015**. Make sure to include in the body of your email response, the following details:

- Company Name
- Contact Name
- Contact Email
- Contact Phone

NOTE: The attached Non-Disclosure Agreement (NDA) is to be printed, signed, scanned and returned with your email in order to receive additional information and the RFQ.

Again, thank you for your continued partnership and consideration.

Sincerely,
PSE Lease Program Selection Team

Existing Equipment	Replacement Equipment	Site Check (flat cost)	Permit Handling Fee (flat cost)	Standard Installation (flat cost)	Maintenance - Annual (flat cost)	Repair & Service (Hourly labor rate)	PSE zones served	Brands Served
Commercial Water Heaters	Gas Tank-Style Water Heater							
	75-100 Gallon code compliant unit							NA
	80 Gallon code compliant unit							NA
	Electric Tank-Style Water Heater							Brands Served
Residential Water Heaters	75-100 Gallon code compliant unit							NA
	Gas Tank-Style Water Heater							Brands Served
	50 Gallon code compliant unit	N/A						
	50 Gallon code compliant unit	N/A						
	50 Gallon code compliant unit	N/A						
Residential HVAC	Electric Tank-Style Water Heater							
	50 Gallon code compliant unit							
	Gas Forced-Air Furnace							
	up to 50K BTU code compliant unit							
	up to 50K BTU code compliant unit							
	up to 50K BTU code compliant unit							
	up to 50K BTU code compliant unit							
	up to 50K BTU code compliant unit							
	up to 50K BTU code compliant unit							
	up to 50K BTU code compliant unit							
Note:	Air Source Heat Pump							
	2.5 ton code compliant unit							

Note: Competitive pricing requested is intended for budgetary purposes at this point and not for a contract or order commitment.

From: [REDACTED]
Sent: Thursday, October 15, 2015 3:08 PM
To: LeaseBid -- mail --; [REDACTED]
Cc: [REDACTED]
Subject: RE: PSE New Lease Program - [REDACTED] interview
Attachments: Procurement RFQ Matric Exhibit [REDACTED].xlsx

My apologies.

I have filled in these fields and also corrected the Standard Installation cost on the commercial electric installation.

Thank you,

[REDACTED]

From: LeaseBid -- mail -- [mailto:LeaseBid@pse.com]
Sent: Thursday, October 15, 2015 12:35 PM
To: [REDACTED]; LeaseBid -- mail --
Cc: [REDACTED]
Subject: RE: PSE New Lease Program - [REDACTED]

[REDACTED]

Thank you for forwarding the attached. Can you please confirm site check, permit handling fee, maintenance and repair costs for the commercial equipment? Also, please verify that same comments for PSE zones and Brands Served hold true.

Sincerely,

PSE Lease Solutions Selection Team

From: [REDACTED]
Sent: Thursday, October 15, 2015 10:48 AM
To: [REDACTED]; LeaseBid -- mail --
Cc: [REDACTED]
Subject: RE: PSE New Lease Program - [REDACTED]

All,

Attached is the revised matrix.

Please let us know if you have any other questions.

Thanks,

[REDACTED]

From: [REDACTED]
Sent: Thursday, October 15, 2015 10:04 AM
To: LeaseBid -- mail --
Cc: [REDACTED]
Subject: RE: PSE New Lease Program - [REDACTED]

PSE Solutions Team,
We will send this today.

One other note, we also [REDACTED] They are telling us they have a new product which is 100% aimed at Demand Response and meets all PSE criteria.

We will setup a call with them for next week.

Thanks,

[REDACTED]

From: LeaseBid -- mail -- [<mailto:LeaseBid@pse.com>]
Sent: Wednesday, October 14, 2015 4:00 PM
To: [REDACTED]; LeaseBid -- mail --
Cc: [REDACTED]
Subject: RE: PSE New Lease Program - [REDACTED]

Thank you for the below detail on DR capabilities, no further follow up necessary at this juncture. We'll keep an eye out for your updated cost matrix.

Sincerely,

PSE Lease Solutions Selection Team

From: [REDACTED]
Sent: Tuesday, October 13, 2015 10:59 AM
To: LeaseBid -- mail --
Cc: [REDACTED]
Subject: RE: PSE New Lease Program - FAST interview

All,
We have sent #2 and will send an updated Matrix later today.

With regards to #3:

[REDACTED]

[REDACTED]

We will follow up with the Matrix later today.

Thanks very much,

[REDACTED]

From: LeaseBid -- mail -- [<mailto:LeaseBid@pse.com>]

Sent: Wednesday, October 07, 2015 8:09 AM

To: [REDACTED]

Subject: PSE New Lease Program - [REDACTED]

[REDACTED]

Thank you for your time yesterday, it was a very productive meeting with your team. There are a few follow-up items we would like you to address to assist us in our process; see below.

1. Please provide an updated RFQ Matrix detailing standard cost of installation only without equipment costs included? Your original RFQ matrix submittal is attached.
2. Complete and return attached interview questionnaire.
3. Can you provide any details regarding demand response electric water heat equipment? Most specifically, do you know whether your manufacture partners have commercially viable residential equipment using OpenADR communication standard protocol? If so could you provide the incremental equipment cost as compared to the conventional equipment you proposed? Does [REDACTED] have any experience installing/maintaining DR capable equipment, and if so are there any pros/cons you could share?

Thanks,

PSE Lease Solutions Selection Team

From: [REDACTED]
Sent: Friday, July 10, 2015 8:02 AM
To: LeaseBid -- mail --
Subject: RE: Interest in lease RFQ
Attachments: PSE Lease-Bid Procurement RFQ.xlsx

Attached is the spreadsheet. We would not be participating in the water tank part of this so I did not fill out.

Let me know if you have any questions or if I should send a different direction.

Thank you,

[REDACTED]

Connect with us!



From: LeaseBid -- mail -- [<mailto:LeaseBid@pse.com>]
Sent: Monday, July 06, 2015 10:39 AM
To: [REDACTED]
Subject: RE: Interest in lease RFQ

Understood, we'll look for your response by the end of the week.

Thank you,
PSE Lease Program Selection Team

From: [REDACTED]
Sent: Monday, July 06, 2015 9:45 AM
To: LeaseBid -- mail --
Subject: RE: Interest in lease RFQ

Yes, with the extraordinary weather having a few days would be great. I should be able to get it to you by the end of this week.

[REDACTED]

Connect with us!



From: LeaseBid -- mail -- [<mailto:LeaseBid@pse.com>]
Sent: Monday, July 06, 2015 8:49 AM
To: [REDACTED]
Subject: RE: Interest in lease RFQ

[REDACTED]

You returned the NDA form indicating interest in bidding on the lease program, however we do not receive your submission. Please let us know if additional time would allow your company to submit a bid.

Thank you,
PSE Lease Program Selection Team

From: [REDACTED]
Sent: Friday, May 22, 2015 2:19 PM
To: LeaseBid -- mail --
Subject: Interest in lease RFQ

I look forward to hearing more about it.

[REDACTED]

Thanks,

[REDACTED]

Connect with us!



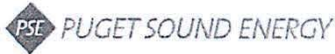
Existing Equipment	Replacement Equipment	Site Check (flat cost)	Permit Handling Fee (flat cost)	Standard Installation (flat cost)	Maintenance - Annual (flat cost)	Repair & Service (Hourly/Labor rate)	PSE zones served	Brands Served
Commercial Water Heaters	Gas Tank-Style Water Heater 75-100 Gallon / 125k - 200k BTUs / ≥ 80% thermal efficiency compliant unit	Site Check	Permit Handling Fee	Standard Installation	Maintenance - Annual	Repair & Service	PSE zones served	Brands Served
	80 Gallon code compliant unit	Site Check	Permit Handling Fee	Standard Installation	Maintenance - Annual	Repair & Service	PSE zones served	Brands Served
	75-100 Gallon code compliant unit	Site Check	Permit Handling Fee	Standard Installation	Maintenance - Every 6 yrs.	Repair & Service	PSE zones served	Brands Served
	Gas Tank-Style Water Heater 75-100 Gallon / ≥ 0.97 - 0.00.132V, EF	Site Check	Permit Handling Fee	Standard Installation	Maintenance - Every 6 yrs.	Repair & Service	PSE zones served	Brands Served
Residential Water Heaters	Gas Tank-Style Water Heater 50 Gallon code compliant unit	N/A	Permit Handling Fee	Standard Installation	Maintenance - Every 6 yrs.	Repair & Service	PSE zones served	Brands Served
	50 Gallon code compliant unit	N/A	Permit Handling Fee	Standard Installation	Maintenance - Every 6 yrs.	Repair & Service	PSE zones served	Brands Served
	50 Gallon code compliant unit	N/A	Permit Handling Fee	Standard Installation	Maintenance - Every 6 yrs.	Repair & Service	PSE zones served	Brands Served
	Electric Tank-Style Water Heater 50 Gallon / Energy Star Certified / ≥ 0.67 EF compliant unit	Site Check	Permit Handling Fee	Standard Installation	Maintenance - Every 6 yrs.	Repair & Service	PSE zones served	Brands Served
Residential HVAC	Gas Forced-Air Furnace up to 50k BTU code compliant unit	Site Check	Permit Handling Fee	Standard Installation	Maintenance - Every 2 yrs.	Repair & Service	PSE zones served	Brands Served
	80% AFUE / Variable-speed blower motor / Two-stage heating / up to 50k BTUs	Site Check	Permit Handling Fee	Standard Installation	Maintenance - Every 2 yrs.	Repair & Service	PSE zones served	Brands Served
	up to 50k BTU code compliant unit	Site Check	Permit Handling Fee	Standard Installation	Maintenance - Every 2 yrs.	Repair & Service	PSE zones served	Brands Served
	80% AFUE / High efficiency blower motor / Single-stage heating / up to 50k BTUs compliant unit	Site Check	Permit Handling Fee	Standard Installation	Maintenance - Every 2 yrs.	Repair & Service	PSE zones served	Brands Served
95% AFUE / Energy Star Certified / High efficiency blower motor / up to 50k BTUs compliant unit	Site Check	Permit Handling Fee	Standard Installation	Maintenance - Every 2 yrs.	Repair & Service	PSE zones served	Brands Served	
95% AFUE / Energy Star Certified / High efficiency blower motor / up to 50k BTU condensing unit	Site Check	Permit Handling Fee	Standard Installation	Maintenance - Every 2 yrs.	Repair & Service	PSE zones served	Brands Served	
Air Source Heat Pump 9.00 HSPF / up to 16.00 SEER / up to 2.5 tons unit	Site Check	Permit Handling Fee	Standard Installation	Maintenance - Every 2 yrs.	Repair & Service	PSE zones served	Brands Served	

Note: Competitive pricing requested is intended for budgetary purposes at this point and not for a contract or order commitment.

From: [REDACTED]
Sent: Wednesday, June 24, 2015 10:37 AM
To: LeaseBid -- mail --
Cc: [REDACTED]
Subject: PSE New Lease Program
Attachments: [REDACTED]

If you have any question please call.





MUTUAL NONDISCLOSURE AGREEMENT

Puget Sound Energy, Inc. a Washington corporation with offices at 10885 NE 4th St., Bellevue, WA ("PSE") and the "Other Party" identified on the signature page below are considering a business transaction (the "Transaction"). In connection with the proposed Transaction, the parties are willing to disclose confidential information to each other on the terms and conditions stated in this agreement (this "Agreement").

The parties, intending to be legally bound, agree that:

I. Confidentiality.

1. In connection with the Transaction, each party (a "Disclosing Party") is prepared to make available to the other party (a "Receiving Party") certain Confidential Information regarding the Disclosing Party's business. The Receiving Party agrees to keep such information confidential, and protect all Confidential Information from disclosure by using the highest practical degree of care and at least the same care the Receiving Party uses to protect its own confidential information.

2. "Confidential Information" means: (i) any and all information with respect to the status of or the terms of the Transaction, and (ii) any trade secrets or other confidential or proprietary information of the Disclosing Party, whether of a technical, business or other nature (including, without limitation, the relationship between the parties, and information relating to the Disclosing Party's technology, software, products, services, designs, methodologies, know how, business plans, finances, marketing plans, customers, employees, prospects or other affairs). Confidential Information also includes any information that has been made available to the Disclosing Party by third parties that the Disclosing Party is obligated to keep confidential.

3. Receiving Party may not disclose Confidential Information to third parties; provided, however, that notwithstanding the foregoing, Receiving Party may disclose Confidential Information to its employees, consultants, advisors, or other agents (its "Representatives") only to the extent necessary for such Representatives to assist the Receiving Party in evaluating the Transaction, provided that such Representatives agree to keep such Confidential Information confidential in accordance with this Agreement. A breach of this Agreement by a Representative of Receiving Party will be deemed a breach by the Receiving Party, and Receiving Party agrees, at its sole expense, to take all reasonable measures (including but not limited to court proceedings) to restrain its Representatives from prohibited or unauthorized disclosure of the Confidential Information. Receiving Party shall immediately notify Disclosing Party of any actual, probable or reasonably suspected disclosure or unauthorized access to the Disclosing Party's Confidential Information.

4. Receiving Party will not use or allow others to use Confidential Information for any purpose other than evaluating the Transaction.

5. At Disclosing Party's request, Receiving Party will return all materials furnished by Disclosing Party that contain Confidential Information and will destroy or deliver to Disclosing Party any other materials containing Confidential Information, including materials prepared by Receiving Party, unless such Confidential Information is required to be retained by the Receiving Party to comply with applicable law, regulatory requirements or internal document retention policies. Notwithstanding the foregoing, the parties acknowledge that Receiving Party's computer systems may automatically back-up and retain electronic copies of the Confidential Information. To the extent that such systems create copies of the Confidential Information, the Receiving Party may retain such copies in its archival or back-up computer storage. If the Receiving Party retains a copy of any Confidential Information for any reason, including copies on electronic

backup media, then such information shall in all respects remain subject to the terms and conditions of this Agreement.

6. The provisions of this Part I shall not apply to Confidential Information that: (a) is or becomes publicly available through no fault of Receiving Party; (b) is or has been received in good faith by Receiving Party without restriction on use or disclosure from a third party having no obligation of confidentiality to Disclosing Party; or (c) is or has been independently developed by Receiving Party without reference to Confidential Information received from Disclosing Party, as evidenced by Receiving Party's written records.

7. The fact that portions of Confidential Information may be publicly available or otherwise not subject to this Agreement will not affect Receiving Party's obligations with respect to the remaining portion.

8. If Receiving Party is required by judicial or administrative process to disclose Confidential Information, Receiving Party shall promptly notify Disclosing Party and allow Disclosing Party a reasonable time to oppose such process. If disclosure is nonetheless required, Receiving Party may disclose only the Confidential Information that, in the written opinion of counsel acceptable to Disclosing Party, Receiving Party is legally required to disclose. Receiving Party shall use its best efforts to limit the dissemination of Confidential Information that is disclosed.

9. This Agreement will not apply to information disclosed to Receiving Party after Receiving Party receives written notice from Disclosing Party that further disclosures will not be treated as confidential.

10. In providing Confidential Information pursuant to this Agreement, Disclosing Party makes no representation, either express or implied, as to adequacy, sufficiency, or freedom from fault of such Confidential Information and incurs no responsibility nor obligation whatsoever by reason thereof; and the furnishing of such Confidential Information will not convey any rights or license with respect to such Confidential Information.

II. No Commitment to Enter Into Transaction. The parties acknowledge that nothing in this Agreement is intended to create or constitute any agency or partnership among the parties, or any legally binding obligation for either party to enter into, or negotiate to enter into, the Transaction.

III. Miscellaneous.

1. This Agreement shall continue in full force and effect for two (2) years from the Effective Date, unless terminated earlier or extended by mutual agreement of the parties.

2. In the event of a default under this Agreement, the non-breaching party will be entitled to injunctive relief, without posting bond, in addition to any other available remedies, including damages. In any litigation concerning this Agreement, the prevailing party will be entitled to recover all reasonable expenses of litigation, including reasonable attorney fees at trial and on any appeal.

3. Any failure by a party to enforce another party's strict performance of any provision of this Agreement will not constitute a waiver of its right to subsequently enforce such provision or any other provision of this Agreement.

4. This Agreement will be governed by and construed and enforced in accordance with the internal laws of the state of Washington, without regard to contrary principles of conflicts of law. The federal and state courts within the State of Washington shall have exclusive jurisdiction to adjudicate any dispute arising out of and relating to this Agreement. Venue for purposes of any litigation arising under this Agreement will be in King County, Washington.

5. All additions or modifications to this Agreement must be in writing and executed by all parties.

EFFECTIVE DATE

Puget Sound Energy, Inc.

Authorized Signature: Jill R. Larson, MBA, CPSM

Name: Jill R. Larson, MBA, CPSM

Title: Senior Buyer

Date: May 29, 2015



Existing Equipment	Replacement Equipment	Site Check (flat cost)	Permit Handling Fee (flat cost)	Standard Installation (flat cost)	Maintenance - Annual (flat cost)	Repair & Service (Hourly labor rate)	PSE zones served	Brands Served
Commercial Water Heaters	Gas Tank-Style Water Heater 75-100 Gallon / 125k - 200k BTUs / ≥ 80% thermal efficiency compliant unit	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	80 Gallon code compliant unit	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Electric Tank-Style Water Heater 75-100 Gallon / ≥ 0.97 - 0.00 132V, EF compliant unit	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Gas Tank-Style Water Heater 50 Gallon code compliant unit	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Residential Water Heaters	50 Gallon code compliant unit	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	50 Gallon code compliant unit	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	50 Gallon code compliant unit	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	50 Gallon code compliant unit	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Residential HVAC	Gas Forced-Air Furnace up to 50k BTU code compliant unit	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	80% AFUE / High efficiency blower motor / Single-stage heating / up to 50k BTU code compliant unit	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	95% AFUE / Energy Star Certified / High efficiency blower motor / up to 50k BTU code compliant unit	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	95% AFUE / Energy Star Certified / High efficiency blower motor / up to 50k BTU code compliant unit	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Air-Source Heat Pump 9.00 HSPF / up to 16.00 SEER / up to 2.5 ton unit	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Note: Competitive pricing requested is intended for budgetary purposes at this point and not for a contract or order commitment.

From: [REDACTED]
Sent: Friday, June 26, 2015 12:29 PM
To: LeaseBid -- mail --
Cc: [REDACTED]
Subject: [REDACTED]
Attachments: 20150626122531147.pdf

PSE Lease Team,

Thank you for the opportunity to be considered for Preferred Supplier participation in the proposed PSE Lease Bid program.

Attached please find RFQ response from [REDACTED]

We look forward to continuing in the process.

Thank you again.

[REDACTED]



REQUEST FOR QUALIFICATIONS AND RATE SHEET

Puget Sound Energy Energy Equipment Leasing - HVAC

Submitted June 26, 2015



Table of Contents

Statement of Capability and Commitment	3
Qualification Summary	3 -5
Pricing Sheet	Exhibit A
Standard versus supplemental project scopes	Exhibit B
CAN Zone List	Exhibit C
Nondisclosure Agreement	Exhibit D
Certificate of Liability Insurance.....	Exhibit E
Company Information Sheet	Exhibit F

[REDACTED]

**REQUEST FOR QUALIFICATIONS AND RATE SHEET
Energy Equipment Leasing - HVAC**

Submitted June 26, 2015

Statement of Capability and Commitment:

[REDACTED] has both the capability and commitment required to expand its partnership with Puget Sound Energy to include success in the proposed new Leasing Program. [REDACTED] brings a nearly 40 year legacy of installation and maintenance excellence serving Puget Sound residential HVAC and water heater markets.

Qualifications Summary:

[REDACTED] is uniquely qualified to partner with PSE as a Preferred Supplier in the proposed HVAC Lease Program. Specific qualifications include:

1. PSE Tier 1 CAN partner

- o Highly engaged Tier 1 CAN partner
- o High volume, high performance partner with over \$100,000 / yr in instant rebates provided directly to PSE customers
- o Actively engaged with CAN referral program

2. Technical knowledge, capability and experience.

[REDACTED] has over 100 employees dedicated to HVAC design, sales, installation and service. The company maintains dedicated teams for Sales, Administrative Support, Installation, Equipment / Material Handling and Service (maintenance & repair).

[REDACTED] has the experience and expertise required to perform at a high level. In calendar year 2014 the company performed over 1,500 residential HVAC installations.

[REDACTED] provides ongoing training and development programming and employees hold various certifications and licenses. For example, EPA Certification, NATE certifications, 06A Electrical cards, Refrigeration licenses and manufacturer specific training certificates.

3. Insurance / Licensing Compliant

- o General Liability / Commercial Automobile Liability of \$2MM per occurrence
- o WA State Contractors and Business licenses
- o See Exhibit F

4. Coverage Territory Expansive

[REDACTED] serves the greater Puget Sound region extending from Tacoma to Everett. Generally speaking, the company does not provide service east of the Cascades or areas requiring ferry travel. A specific list of service zones is included in Exhibit C.

5. Proven experience

Many of the residential HVAC projects the company does have utility company program involvement. For example, PSE's CAN and related "instant rebate" program and Snohomish County PUD's Weatherization / Heating program.

█████ routinely uses financing as a tool to help consumers obtain energy efficient HVAC solutions they may not otherwise be able to afford. █████ typically utilizes Puget Sound Cooperative Credit Union for this financing and is familiar with benefits, selling and administration in a leased solution environment.

█████ has additional utility company interaction on a regular basis. For example, coordination of meter installation / upgrade is routine.

6. Robust Business Processes

Robust, efficient businesses processes are essential to enable the high volume of HVAC installations performed by the company. Following are examples of mature, core business processes currently in place:

- Lead handling / tracking – full time, dedicate Sales Coordinator. █████ uses Salesforce.com to track leads and manage customer relationship.
- Sales consultation scheduling / execution – Sales Consultants electronically receive (Outlook Calendar) appointments along with tax parcel ID which allows them to research project site prior to the consultation.
- Sales booking / contract processing
- Permit acquisition / administration – dedicated resource
- Installation scheduling and post install follow up – full time, dedicated Installation Coordinator
- Material and equipment purchasing and handling – two warehouses, four (4) full time personnel
- Installation by qualified and experienced personnel – over ten (10) full time Installation crews, multiple Electrical crews, additional installation resources available from new construction installation team. Installation process, including start up is well defined.
- Inventory management –high volume "just in time" relationship with key suppliers who make daily deliveries, Two warehouses, four full time personnel

7. 24/7 customer service

Service is available 24x7. After hours tech on call is always available and returns emergency service call requests promptly. Service department runs over 12,000 service calls annually and maintains a large team of qualified service technicians.

8. Warranty

Standard warranty coverage includes one year labor warranty from [REDACTED] plus manufacturer warranty for parts and equipment. Typical manufacturer warranty is ten (10) years for parts and equipment on furnaces and heat pumps.. Extended warranties which cover labor for ten (10) years are available for an additional cost. Water heater warranties typically range from five (5) to eight (8) years.

[REDACTED] does all warranty administration required by manufacturers, for no additional cost to the customer, when [REDACTED] purchases equipment. This proposal includes manufacturer warranty administration even though equipment is being purchased by PSE. Confirmation of process details is needed and will require collaboration of PSE and manufacturer(s).

Safety

[REDACTED] recognizes importance of safety and maintains on ongoing safety program. Safety programming includes written Safety Manual, regular safety training and maintenance of various safety certifications including EPA cards for field personnel.

[REDACTED] is an EPA Lead-Safe Certified Firm.

9. Customer service response time

[REDACTED] intends to complete customer site inspections/installations within 48 hours of customer acceptance and typically performs service calls the same or next day.

10. Customer Satisfaction

[REDACTED] has an unusually high customer satisfaction ethos. The company prides itself on providing exceptional customer service and prompt, professional resolution of any customer concerns. [REDACTED] has an A+ Better Business Bureau rating and enjoys Angie's List Super Service status.

[REDACTED] provides written Customer Satisfaction Survey upon completion of each project and receives a high volume of survey responses. Survey results indicate a 98%+ "would recommend" response with a perfect score being the most common result. In addition, the company follows up installation projects with a personal phone call to answer any question and confirm satisfaction.

EXHIBIT A

Existing Equipment	Replacement Equipment	Site Check (flat cost)	Permit Handling Fee (flat cost)	Standard Installation (flat cost)	Maintenance - Annual (flat cost)	Repair & Service (Hourly labor rate)	PSE zones served	Brands Served
Commercial Water Heaters	Gas Tank-Style Water Heater							
	75-100 Gallon code compliant unit	NA						
	80 Gallon code compliant unit	NA						
	Electric Tank-Style Water Heater							
	75-100 Gallon / ≥ 0.97 - 0.00 132V, EF compliant unit	NA						
Residential Water Heaters	Gas Tank-Style Water Heater							
	50 Gallon code compliant unit	N/A						
	50 Gallon code compliant unit	N/A						
	50 Gallon code compliant unit	N/A						
	Electric Tank-Style Water Heater							
	50 Gallon code compliant unit	N/A						
Residential HVAC	Gas Forced-Air Furnace							
	up to 50K BTU code compliant unit							
	80% AFUE / Variable-speed blower motor / Two-stage heating / up to 50K BTUs							
	up to 50K BTU code compliant unit							
	80% AFUE / High efficiency blower motor / Single-stage heating / up to 50K BTUs							
	up to 50K BTU code compliant unit							
	95% AFUE / Energy Star Certified / High efficiency blower motor / Single-stage heating / up to 50K BTUs							
up to 50K BTU code compliant unit								
	Air Source Heat Pump							
	2.5 ton code compliant unit							
	9.00 HSPF / up to 16.00 SEER / up to 2.5 tons							
<p>Note: Competitive pricing requested is intended for budgetary purposes at this point and not for a contract or order commitment.</p>								

EXHIBIT B

Commercial Gas Water Heater Replacement

Cost component	What should be considered standard	What should be considered supplemental
Site Check	<ol style="list-style-type: none"> 1. Verify installation will meet code (venting, combustion air, gas pipe, clearances, etc.) 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s) 	
Permit	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 	
Installation	<ol style="list-style-type: none"> 1. Shut off power 2. Shut off gas line and disconnect 3. Check inlet water pressure 4. Disconnect wiring 5. Remove and dispose of old water heater 6. Install tank stand or plumb to the floor (do not include cost of stand) 7. Install new water heater <ul style="list-style-type: none"> o Include 2 new water flex, 1 gas flex & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank 12. Fire off unit, check combustion and firing rate <ul style="list-style-type: none"> o Check combustion of furnace if common venting used 13. Set temperature and check all controls 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with owner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open loop systems 7. Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier post o Water alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Relighting other appliances if fuel line removed past G valve

PAGE 1 OF 10

Commercial Gas Water Heater Replacement

<p>Standard Maintenance</p>	<ol style="list-style-type: none">1. Inspect ignition system and safety controls—clean and adjust as needed2. Inspect burner assembly—clean and adjust as needed3. Inspect flue system—check for proper attachment to the water heater, any dislocated sections, and for signs of corrosion4. Check gas pressure and adjust as necessary5. Inspect for gas leaks6. Test (TPR) temperature-pressure-release valve7. Check the anode rod8. Drain the tank and flush out sediment9. Fill tank10. Check temperature and adjust to 120 degrees as necessary11. Inspect control box, associated controls, wiring and connections12. Inspect for water leaks13. Check all safety operations14. Clean site15. Discuss service with owner	
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PAGE 2 OF 10

PAGE 3 of 10

Commercial Electric Water Heater Replacement

Cost component	What should be considered standard	What should be considered supplemental
Site Check	<ol style="list-style-type: none"> 1. Verify installation will meet code 2. Draft work order for installation 3. Schedule installation date 4. Secure customer signature on PSE form(s) 	N/A
Permit	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 	N/A
Installation	<ol style="list-style-type: none"> 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Install tank stand or plumb to the floor (do not include cost of stand) 6. Install new water heater <ul style="list-style-type: none"> o Include 2 new water flex 7. Connect wiring with 2 new wire nuts 8. Fill tank 9. Set temperature and check all controls 10. Check all safety operations 11. Clean site 12. Discuss installation and operation with owner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Open loop systems 5. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier post o Water Alarm o Relief line
Standard Maintenance	<ol style="list-style-type: none"> 1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Drain the tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with owner 	N/A

PAGE 4 of 10

Residential Electric Water Heater Replacement

Cost component	What should be considered standard	What should be considered supplemental
Permit	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 	<p>N/A</p>
Installation	<ol style="list-style-type: none"> 1. Shut off power 2. Disconnect wiring 3. Check inlet water pressure 4. Remove and dispose of old water heater 5. Install tank stand or plumb to the floor (do not include cost of stand) <ul style="list-style-type: none"> o Include 2 new water flex 6. Install new water heater <ul style="list-style-type: none"> o Connect wiring with 2 new wire nuts 7. Fill Tank 8. Set temperature and check all controls 9. Check all safety operations 10. Clean site 11. Discuss installation and operation with homeowner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Open loop systems 5. Code upgrades <ul style="list-style-type: none"> o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier Post o Water Alarm o Relief line
Standard Maintenance	<ol style="list-style-type: none"> 1. Test (TPR) temperature-pressure-release valve 2. Check the anode rod 3. Drain the tank and flush out sediment 4. Fill tank 5. Check temperature and adjust to 120 degrees as necessary 6. Inspect control box, associated controls, wiring and connections 7. Inspect for water leaks 8. Check all safety operations 9. Clean site 10. Discuss service with homeowner 	<p>N/A</p>

PAGE 5 of 10

Residential Gas Furnace Replacement

Cost component	What should be considered standard	What should be considered supplemental
Site Check	<ol style="list-style-type: none"> 1. Perform heat loss & Manual J calculations 2. Take material measurement 3. Verify installation will meet code (venting, combustion air, gas pipe, clearances, etc.) 4. Draft work order for installation 5. Schedule installation date 6. Secure customer signature on PSE form(s) 	N/A
Permit	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 	N/A
Installation	<ol style="list-style-type: none"> 1. Conduct duct blaster 2. Shut off power 3. Shut off gas line and disconnect 4. Disconnect 115 v and 24 V wiring 5. Remove and dispose of old furnace 6. Design and build transitions 7. Cut sheet metal to transition points 8. Install furnace 9. Install new sheet metal, filter channel and standard filtration system 10. Seal internal and external joints 11. Install and/or reconnect venting 12. Hook up, inspect and test fuel line 13. Hook up 115v wiring from J-box to furnace 14. Install fan switch or connect to t-stat 15. Hook up internal 24 v controls and t-stat 16. Fire off unit, check combustion and firing rate <ul style="list-style-type: none"> o Check combustion of water heater if common venting used) 17. Set fan speed, check all controls, run through heating cycle 18. Check all safety operations 19. Clean site 20. Review T-stat settings with customer to optimize their goals/system performance 21. Discuss installation and operation with homeowner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of furnace 3. Relocating gas line 4. Relocating venting over 5. Additional supply or return runs 6. Increasing duct size 7. Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o PVC/Condensate/ Condensate pump o Increasing gas line size per code o Securing gas line to code 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. T-stat relocation or rewiring installs 11. Installing new or smart t-stat 12. Advanced air filtration system 13. Controls add-ons (temperature/humidity sensor) 14. Cutting sheetrock 15. Relighting other appliances if fuel line removed past G valve 16. Whole house duct sealing 17. Air conditioning

Residential Gas Furnace Replacement

<p>Standard Maintenance</p>	<ol style="list-style-type: none"> 1. Inspect, clean and lubricate blower assembly (includes blower housing, blower wheel and motor) 2. Check combustion blower housing for lint and debris and clean as necessary 3. Inspect drain pan and condensate drain lines. Clean as needed 4. Test condensate pump 5. Check gas pressure and adjust as necessary 6. Inspect for gas leaks 7. Inspect burner assembly—clean and adjust as needed 8. Inspect ignition system and safety controls—clean and adjust as needed 9. Inspect heat exchanger or heating elements 10. Inspect flue system—check for proper attachment to the furnace, any dislocated sections, and for signs of corrosion. 11. Check Amp draw 12. Inspect control box, associated controls, wiring and connections 13. Clean or replace air filters 14. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 15. Check temperature rise 16. Check all safety operations 17. Discuss service with homeowner 	<p>N/A</p>
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PAGE 7 of 10

Residential Gas Water Heater Replacement

Cost component	What should be considered standard	What should be considered supplemental
Permit	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical) and associated labor and inspection time – where applicable 	
Installation	<ol style="list-style-type: none"> 1. Shut off power 2. Shut off gas line and disconnect 3. Check inlet water pressure 4. Disconnect wiring 5. Remove and dispose of old water heater 6. Install tank stand or plumb to the floor (do not include cost of stand) 7. Install new water heater <ul style="list-style-type: none"> o Include 2 new water flex, 1 gas flex & sediment trap 8. Install and/or reconnect venting 9. Hook up, inspect and test fuel line 10. Connect wiring 11. Fill Tank 12. Fire off unit, check combustion and firing rate <ul style="list-style-type: none"> o Check combustion of furnace if common venting used 13. Set temperature and check all controls 14. Check all safety operations 15. Clean site 16. Discuss installation and operation with homeowner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of water heater 3. Relocation of plumbing lines 4. Relocating gas line 5. Relocating venting 6. Open loop systems 7. Code upgrades <ul style="list-style-type: none"> o Adding combustion air o B vent o Increasing gas line size per code o Securing gas line to code o Expansion tank o Drip pan o Earthquake straps & 2x4 bracing o Barrier Post o Water Alarm o Relief line 8. Extending gas lines for additional appliances 9. Priming and painting gas line 10. Relighting other appliances if fuel line removed past G valve

Residential Gas Water Heater Replacement

<p>Standard Maintenance</p>	<ol style="list-style-type: none">1. Inspect ignition system and safety controls—clean and adjust as needed2. Inspect burner assembly—clean and adjust as needed3. Inspect flue system—check for proper attachment to the water heater, any dislocated sections, and for signs of corrosion4. Check gas pressure and adjust as necessary5. Inspect for gas leaks6. Test (TPR) temperature-pressure-release valve7. Check the anode rod8. Drain the tank and flush out sediment9. Fill tank10. Check temperature and adjust to 120 degrees as necessary11. Inspect control box, associated controls, wiring and connections12. Inspect for water leaks13. Check all safety operations14. Clean site15. Discuss service with homeowner	
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PAGE 9 of 10

Residential Heat Pump Replacement

Cost component	What should be considered standard	What should be considered supplemental
Site Check	<ol style="list-style-type: none"> 1. Perform heat loss & Manual J calculations 2. Take material measurement 3. Verify installation will meet code 4. Draft work order for installation 5. Schedule installation date 6. Secure customer signature on PSE form(s) 	N/A
Permit	<ol style="list-style-type: none"> 1. Handling fee for obtaining standard permit (mechanical & electrical) and associated labor and inspection time – where applicable 	N/A
Installation	<ol style="list-style-type: none"> 1. Conduct duct blaster 2. Shut off power 3. Disconnect wiring 4. Remove and dispose of old refrigerant and lines 5. Remove and dispose of old air handler and outdoor unit 6. Design and build transitions and fittings 7. Cut sheet metal to transition points 8. Install new air handler and indoor coil 9. Install new sheet metal, filter channel and standard filtration system 10. Seal internal and external joints 11. Install new outdoor unit 12. Install new R410A compatible refrigerant lines & refrigerant 13. Complete all electrical connections 14. Charge, inspect and test refrigerant lines 15. Check all controls, run through heating and cooling cycles 16. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 17. Check all safety operations 18. Cleanup 19. Discuss installation and operation with homeowner 	<ol style="list-style-type: none"> 1. Crawl space or attic installation 2. Relocation of indoor air handler 3. Relocating outdoor unit 4. Pad for outdoor unit and ground prep 5. Relocating refrigerant line 6. Additional supply or return runs 7. Increasing duct size 8. Code upgrades <ul style="list-style-type: none"> o Outdoor thermostat & lockout o Condensate/ Condensate pump 9. T-stat relocation or rewiring installs 10. Installing new or smart t-stat 11. Advanced air filtration system 12. Sound Blanket for outdoor coil 13. Hard Start Kit 14. Whole house duct sealing

PAGE 10 OF 107

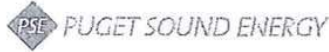
Residential Heat Pump Replacement

<p>Standard Maintenance</p>	<p>Indoor Unit</p> <ol style="list-style-type: none"> 1. Inspect and clean blower assembly (includes blower housing, blower wheel and motor) 2. Inspect evaporator coil, drain pan and condensate drain lines. Clean as needed 3. Test condensate pump 4. Inspect refrigerant lines and connection 5. Check Amp draw 6. Inspect control box, associated controls, wiring and connections 7. Clean or replace air filters 8. Fire unit from T-stat and review settings with customer to optimize their goals/system performance 9. Check all safety operations <p>Outdoor Unit</p> <ol style="list-style-type: none"> 1. Inspect unit for proper refrigerant level and adjust if necessary 2. Clean dirt, leaves and debris from inside cabinet 3. Inspect base pan for restricted drain openings -remove obstructions as necessary 4. Inspect coil and cabinet - clean as needed 5. Inspect fan motor and fan blades for wear and damage - lubricate as needed 6. Check outdoor temperature sensors 7. Inspect control box, associated controls/accessories, wiring and connections. Controls may include contactors, relays, circuit boards, capacitors, sump heat and other accessories. All control box and electrical parts should be checked for wear or damage. 8. Inspect compressor and associated tubing for damage 9. Check all safety operations 10. Discuss service with homeowner 	<p>N/A</p>
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Exhibit C



EXHIBIT D



MUTUAL NONDISCLOSURE AGREEMENT

Puget Sound Energy, Inc. a Washington corporation with offices at 10885 NE 4th St., Bellevue, WA ("PSE") and the "Other Party" identified on the signature page below are considering a business transaction (the "Transaction"). In connection with the proposed Transaction, the parties are willing to disclose confidential information to each other on the terms and conditions stated in this agreement (this "Agreement").

The parties, intending to be legally bound, agree that:

I. Confidentiality.

1. In connection with the Transaction, each party (a "Disclosing Party") is prepared to make available to the other party (a "Receiving Party") certain Confidential Information regarding the Disclosing Party's business. The Receiving Party agrees to keep such information confidential, and protect all Confidential Information from disclosure by using the highest practical degree of care and at least the same care the Receiving Party uses to protect its own confidential information.

2. "Confidential Information" means: (i) any and all information with respect to the status of or the terms of the Transaction, and (ii) any trade secrets or other confidential or proprietary information of the Disclosing Party, whether of a technical, business or other nature (including, without limitation, the relationship between the parties, and information relating to the Disclosing Party's technology, software, products, services, designs, methodologies, know how, business plans, finances, marketing plans, customers, employees, prospects or other affairs). Confidential Information also includes any information that has been made available to the Disclosing Party by third parties that the Disclosing Party is obligated to keep confidential.

3. Receiving Party may not disclose Confidential Information to third parties; provided, however, that notwithstanding the foregoing, Receiving Party may disclose Confidential Information to its employees, consultants, advisors, or other agents (its "Representatives") only to the extent necessary for such Representatives to assist the Receiving Party in evaluating the Transaction, provided that such Representatives agree to keep such Confidential Information confidential in accordance with this Agreement. A breach of this Agreement by a Representative of Receiving Party will be deemed a breach by the Receiving Party, and Receiving Party agrees, at its sole expense, to take all reasonable measures (including but not limited to court proceedings) to restrain its Representatives from prohibited or unauthorized disclosure of the Confidential Information. Receiving Party shall immediately notify Disclosing Party of any actual, probable or reasonably suspected disclosure or unauthorized access to the Disclosing Party's Confidential Information.

4. Receiving Party will not use or allow others to use Confidential Information for any purpose other than evaluating the Transaction.

5. At Disclosing Party's request, Receiving Party will return all materials furnished by Disclosing Party that contain Confidential Information and will destroy or deliver to Disclosing Party any other materials containing Confidential Information, including materials prepared by Receiving Party, unless such Confidential Information is required to be retained by the Receiving Party to comply with applicable law, regulatory requirements or internal document retention policies. Notwithstanding the foregoing, the parties acknowledge that Receiving Party's computer systems may automatically back-up and retain electronic copies of the Confidential Information. To the extent that such systems create copies of the Confidential Information, the Receiving Party may retain such copies in its archival or back-up computer storage. If the Receiving Party retains a copy of any Confidential Information for any reason, including copies on electronic

backup media, then such information shall in all respects remain subject to the terms and conditions of this Agreement.

6. The provisions of this Part I shall not apply to Confidential Information that: (a) is or becomes publicly available through no fault of Receiving Party; (b) is or has been received in good faith by Receiving Party without restriction on use or disclosure from a third party having no obligation of confidentiality to Disclosing Party; or (c) is or has been independently developed by Receiving Party without reference to Confidential Information received from Disclosing Party, as evidenced by Receiving Party's written records.

7. The fact that portions of Confidential Information may be publicly available or otherwise not subject to this Agreement will not affect Receiving Party's obligations with respect to the remaining portion.

8. If Receiving Party is required by judicial or administrative process to disclose Confidential Information, Receiving Party shall promptly notify Disclosing Party and allow Disclosing Party a reasonable time to oppose such process. If disclosure is nonetheless required, Receiving Party may disclose only the Confidential Information that, in the written opinion of counsel acceptable to Disclosing Party, Receiving Party is legally required to disclose. Receiving Party shall use its best efforts to limit the dissemination of Confidential Information that is disclosed.

9. This Agreement will not apply to information disclosed to Receiving Party after Receiving Party receives written notice from Disclosing Party that further disclosures will not be treated as confidential.

10. In providing Confidential Information pursuant to this Agreement, Disclosing Party makes no representation, either express or implied, as to adequacy, sufficiency, or freedom from fault of such Confidential Information and incurs no responsibility nor obligation whatsoever by reason thereof; and the furnishing of such Confidential Information will not convey any rights or license with respect to such Confidential Information.

II. No Commitment to Enter Into Transaction. The parties acknowledge that nothing in this Agreement is intended to create or constitute any agency or partnership among the parties, or any legally binding obligation for either party to enter into, or negotiate to enter into, the Transaction.

III. Miscellaneous.

1. This Agreement shall continue in full force and effect for two (2) years from the Effective Date, unless terminated earlier or extended by mutual agreement of the parties.

2. In the event of a default under this Agreement, the non-breaching party will be entitled to injunctive relief, without posting bond, in addition to any other available remedies, including damages. In any litigation concerning this Agreement, the prevailing party will be entitled to recover all reasonable expenses of litigation, including reasonable attorney fees at trial and on any appeal.

3. Any failure by a party to enforce another party's strict performance of any provision of this Agreement will not constitute a waiver of its right to subsequently enforce such provision or any other provision of this Agreement.

4. This Agreement will be governed by and construed and enforced in accordance with the internal laws of the state of Washington, without regard to contrary principles of conflicts of law. The federal and state courts within the State of Washington shall have exclusive jurisdiction to adjudicate any dispute arising out of and relating to this Agreement. Venue for purposes of any litigation arising under this Agreement will be in King County, Washington.

5. All additions or modifications to this Agreement must be in

EFFECTIVE DATE

Puget Sound Energy, Inc.

Authorized Signature: [Handwritten Signature]

Name: Jill R. Larson, MBA, CPISM

Title: Senior Buyer

Date: May 29, 2015

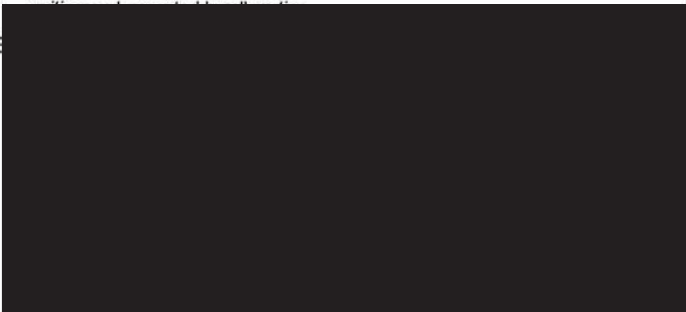


EXHIBIT E



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
01/30/2015

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	CONTACT NAME:	
	PHONE (A/C. No.)	FAX (A/C. No.)
INSURED	E-MAIL ADDRESS:	
	INSURER(S) AFFORDING COVERAGE	
	INSURER A: Continental Western Insurance Company	
	INSURER B:	
INSURER C:		
INSURER D:		
INSURER E:		
INSURER F:		

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> GENERAL LIABILITY <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> Blanket Contractual <input type="checkbox"/> Per ISO CGL Form GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC				2/1/2015	2/1/2016	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS				2/1/2015	2/1/2016	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	<input type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$ NIL				2/1/2015	2/1/2016	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000
A	<input type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N/A		2/1/2015	2/1/2016	<input checked="" type="checkbox"/> WC STATUTORY LIMITS <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)
Exhibit of Insurance. Sample for Bid Purposes Only.

CERTIFICATE HOLDER	CANCELLATION
SAMPLE - FOR BID PURPOSES ONLY	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE

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EXHIBIT F

HVAC RESIDENTIAL, COMMERCIAL INSTALLATIONS AND SERVICE

Corporate Officers: [Redacted] - President
[Redacted] - Chief Financial Officer

Washington State License Number: [Redacted]

Washington State License Number: [Redacted] [Redacted]

Federal ID Number: [Redacted]
Reseller Permit: [Redacted]
U.B.I. Number: [Redacted]
Employment Security Dept. Number:
Labor & Industries Number: [Redacted]

Principle Funding Agency: [Redacted]

Bonding Agent: [Redacted]

Bonding Number: [Redacted]
Liability Insurance Coverage:
Policy Number: [Redacted]

Contract References: [Redacted]

Material Supplier: [Redacted]



From: [REDACTED]
Sent: Monday, June 22, 2015 3:16 PM
To: LeaseBid -- mail --
Cc: [REDACTED]
Subject: RE: PSE lease program
Attachments: [REDACTED]

Please see the attachment and let me know if I have not submitted this correctly.

Thanks



From: McCulloch, Malcolm [<mailto:Malcolm.McCulloch@pse.com>]
Sent: Wednesday, June 10, 2015 12:14 PM
To: [REDACTED]
Cc: [REDACTED]
Subject: PSE lease program
Importance: High

Dear [REDACTED]

I am following up regarding PSE's new lease program and the RFQ that was sent out at the end of May. I left a message on your cell earlier today as we had not yet received a signed NDA from [REDACTED] indicating your company's interest in participating in the RFQ process further; I have attached a copy of the NDA for your reference. Noted below is the schedule associated to this RFQ, which outlines some of key milestones associated to this project. For those that have returned a signed NDA, PSE will be distributing answers to submitted questions EOB tomorrow to assist bidders in their response.

Schedule:

Friday, May 22, 2015	Request e-mailed to firms
Wednesday, May 27, 2015	Intent to Respond and Signed NDA Returned
Friday, May 29, 2015	Request for Qualifications e-mailed to firms
Monday, June 8, 2015	Questions/Comments from Bidders Due, if any
Thursday, June 11, 2015	PSE Responses to Questions/Comments Due
Friday, June 26, 2015	Response to Request for Qualifications Due

As a valued partner I wanted to make sure you had an opportunity to participate in this process.

Sincerely,

Malcolm McCulloch
Manager, Leasing
PUGET SOUND ENERGY
425-424-6530 tel
425-213-9839 cell
www.PSE.com

Existing Equipment	Replacement Equipment	Site Check (flat cost)	Permit Handling Fee (flat cost)	Standard Installation (flat cost)	Maintenance - Annual (flat cost)	Repair & Service (Hourly labor rate)	PSE zones served	Brands Served
Commercial Water Heaters	Gas Tank-Style Water Heater							
	75-100 Gallon code compliant unit							
	80 Gallon code compliant unit							
Residential Water Heaters	Electric Tank-Style Water Heater							
	75-100 Gallon code compliant unit							
	Gas Tank-Style Water Heater							
Residential HVAC	Gas Forced-Air Furnace							
	50 Gallon code compliant unit							
	50 Gallon code compliant unit							
Residential HVAC	Electric Tank-Style Water Heater							
	50 Gallon code compliant unit							
	50 Gallon code compliant unit							
Residential HVAC	Gas Forced-Air Furnace							
	up to 50K BTU code compliant unit							
	up to 50K BTU code compliant unit							
Residential HVAC	Gas Forced-Air Furnace							
	up to 50K BTU code compliant unit							
	up to 50K BTU code compliant unit							
Residential HVAC	Air Source Heat Pump							
	2.5 ton code compliant unit							
	9.00 HSPF / up to 16.00 SEER / up to 2.5 tons							

Note: Competitive pricing requested is intended for budgetary purposes at this point and not for a contract or order commitment.