REQUEST FOR PROPOSAL

RFP No. PGE01-GID02-SH-001

Meter Installation Vendor Services
Next Generation AMI Program

ANTICIPATED U.S. DEPARTMENT OF ENERGY GRANT
Bipartisan Infrastructure Law (BIL)
Accelerating and Deploying Grid Edge Computing

RFP SCHEDULE	
RFP Issue Date	**November 4, 2026**
Questions & Requests for Clarification Due	**November 23, 2026**
Annex H Objections Due	**November 23, 2026 | 5:00 p.m. PST**
PROPOSALS DUE	**December 21, 2026 | 5:00 p.m. PST**
Interviews, if requested	**February 2027**

Late proposals will not be accepted or considered.

SINGLE POINT OF CONTACT

PGE Solicitations
pgesolicitations@pgn.com

Offerors shall not contact other PGE personnel regarding this RFP except as expressly permitted by the RFP.

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SECTION 1: GENERAL INFORMATION

1. RFP Outline

This document establishes the terms and conditions applicable to this Solicitation and is organized into four sections plus annexes, as described below:

Section 1 **General Information:** Provides a general description of the Solicitation requirements.

Section 2 **Offeror Instructions:** Provides the instructions, clauses and conditions applicable to this Solicitation. By submitting a Proposal, the Offeror agrees to be bound by all clauses and conditions contained within this document.

Section 3 **Proposal Preparation Instructions:** Provides Offerors with detailed instructions on how to prepare and submit their Proposals.

Section 4 **Evaluation Procedures and Basis of Selection**: Describes how the evaluation will be conducted, outlines the evaluation criteria that must be addressed in the Proposal, and explains the basis upon which a selection will be made.

2. List of Annexes

The following annexes are hereby incorporated into this RFP:

1. Annex A – Statement of Work
2. Annex B – Basis of Payment
3. Annex C – Mandatory Evaluation Criteria
4. Annex D – Point-Rated Evaluation Criteria
5. Annex E – Contractor Representation and Certification
6. Annex F – Non-Collusion Certification
7. Annex G – Byrd Anti-Lobbying Amendment Certification
8. Annex H – Master Purchase Agreement for Services Template
9. Annex I – Acceptance and Exception List

Each document identified in the List of Annexes is part of the Solicitation. If an annex is listed but not included in the Solicitation package, the Offeror must notify the SPOC before the question deadline. PGE will issue any missing annex through a written addendum.

3. Company Background Information

PGE is a vertically integrated electric utility company engaged in the generation, purchase, transmission, distribution, and retail sale of electricity in the State of Oregon. PGE's corporate headquarters are in Portland, Oregon, and its state-approved service area covers approximately 4,000 square miles, encompassing 51 incorporated cities.

Offerors are encouraged to visit the PGE company website at www.portlandgeneral.com for more detailed information. A service area map and other pertinent company information can be found on the company website under the "Our Company" tab.

4. General Description of Request for Proposal ("RFP")

a. Project Overview

Through this RFP, PGE is seeking a qualified Meter Installation Vendor ("MIV") to perform the large-scale deployment and physical exchange of existing meters with new Advanced Metering Infrastructure ("AMI") meters. The selected vendor will be responsible for planning, coordinating, and executing meter

installation activities across PGE's service territory over a phased deployment expected to occur over approximately three (3) to six (6) years, working in coordination with PGE and the selected AMI system supplier.

b. Project Background

PGE is undertaking a Next Generation AMI Program to replace its existing AMI system, which was originally deployed beginning in 2008 and is approaching the end of its useful life. PGE's existing AMI population consists of approximately 967,000 meter endpoints. Additional proposal preparation, pricing, and evaluation assumptions are provided in Section 1.4(c).

c. Deployment Parameters

For proposal preparation, pricing, and planning purposes, Offerors shall base their proposals on the following common assumptions:

i. For proposal preparation and evaluation purposes only, all Offerors shall use an evaluated planning quantity of 600,000 meter endpoints, allocated between the base residential scope and optional meter categories as set forth in Annex B, Basis of Payment.

ii. **Anticipated Annual Installation Schedule**

PGE's current anticipated annual installation schedule is shown below for Offeror planning purposes. This schedule is an estimate and is subject to change.

Year	2027	2028	2029	2030	2031	2032	Total
#Meters Installed	10,446	22,393	157,045	150,000	150,000	110,116	600,000

iii. The evaluated planning quantity will be allocated by meter type, pricing period, and applicable pricing line item in Annex B, Basis of Payment, for proposal evaluation purposes. The evaluated quantities in Annex B are evaluation weights and are not intended to correspond to PGE's anticipated annual installation schedule.

iv. The evaluated planning quantity is provided solely to establish a common basis for preparing and evaluating Proposals. It is not a forecast, minimum purchase commitment, or guaranteed contract quantity.

v. Actual quantities will be based on Services authorized by PGE and may vary because of final system design, deployment phasing, customer access, field conditions, meter population changes, and other Program requirements.

vi. Compensation under the resulting Contract will be based on authorized, completed, verified, and accepted quantities at the applicable contract prices.

d. Federal Funding Requirements

It is anticipated that this Project will be funded, in whole or in part, through a U.S. Department of Energy (DOE) grant.

Accordingly, this Solicitation and any resulting Contract will be subject to applicable federal requirements, including, but not limited to, 2 CFR Part 200 (Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards) and the terms and conditions of the applicable DOE award.

Offerors must comply with all applicable federal statutes, regulations, executive orders, and grant requirements identified in this Solicitation and any resulting Contract.

BABA and Davis-Bacon Requirements. Based on PGE's current understanding of the scope of Services and applicable federal requirements, PGE does not anticipate that the Build America, Buy America Act ("BABA") will apply to the Services contemplated by this Solicitation.

Routine AMI meter exchange Services that do not involve rewiring, electrical connection changes, upgrades, or other construction, alteration, or repair work are not anticipated to be subject to applicable Davis-Bacon requirements. If PGE authorizes Minor Electrical Repairs involving rewiring, electrical connection changes, or other work constituting construction, alteration, or repair and requiring the use of laborers or mechanics, such work shall be subject to applicable Davis-Bacon requirements. For such covered work, the Contractor and its subcontractors shall comply with the applicable Davis-Bacon labor standards, wage determinations, recordkeeping requirements, and other federal labor requirements incorporated into the Contract.

If PGE subsequently determines that BABA, DBA, or other federal requirements apply to additional Services within the scope of this Solicitation, PGE will address such requirements in accordance with applicable federal requirements and the Contract. Any material change to the scope of Services will be addressed in accordance with PGE's applicable procurement requirements and 2 C.F.R. Part 200, including applicable competition requirements.

5. Contract Duration

The Contractor shall complete all Services and submit all Deliverables within six (6) years of the Effective Date, unless the Contract is earlier completed, expired, or terminated in accordance with its terms.

Notwithstanding completion, expiration, or termination of the Contract, provisions of the Contract and SOW that by their nature or express terms are intended to survive shall remain in effect for the period stated in the applicable Contract provision.

6. Estimated Number of Contracts to be Awarded

PGE anticipates awarding one (1) Contract as a result of this Solicitation. PGE may, however, elect not to make an award if PGE determines that no Proposal provides acceptable value, no Offeror is responsive and responsible, available funding is insufficient, the procurement is canceled, or award would not be in PGE's or the Project's best interest.

Following issuance of the Intent to Award, PGE will allow the protest period stated in Section 2.30 to expire and will resolve any timely submitted protest before executing the Contract, unless otherwise permitted by applicable law or Project requirements.

7. Federal Review and Approval Conditions

Any Contract award and execution are subject to completion of all required PGE and federal-award reviews, notifications, approvals, and funding authorizations. An Intent to Award does not authorize performance, guarantee federal funding, or create a binding contractual obligation. The selected Offeror shall not begin Work or incur costs for which it expects payment until the Contract has been fully executed and PGE has issued written authorization to proceed.

8. RFP Availability

This RFP is available electronically at: portlandgeneral.com/pgebuys.
Any future notices related to this Solicitation, including amendments, will be posted on the PGE website.

9. RFP Definitions

Throughout this RFP, the following definitions apply:

a. **"Business Day"** means any day other than Saturday, Sunday, or a holiday observed by PGE.

b. **"Clarification"** means a limited communication used to explain, verify, or resolve an ambiguity in information already contained in a Proposal. A Clarification may not be used to cure a material

omission, satisfy a Mandatory Evaluation Criterion that was not satisfied as submitted, revise the proposed price, or materially revise a Proposal.

c. **"Discussion"** means a communication conducted after the Proposal Closing Date that permits an Offeror to address identified Proposal weaknesses, deficiencies, or other matters and that may permit a Proposal revision.

d. **"Interview"** means an evaluated oral or written presentation, demonstration, or question-and-answer process conducted using the factors and scoring methodology disclosed in this Solicitation.

e. **"Negotiation"** means post-selection communication intended to finalize the Contract with the selected Offeror. Negotiation may not materially change the scope of the Solicitation, the disclosed evaluation basis, or the relative standing of Offerors.

f. **"Offeror"** refers to an individual, joint venture, or a company that submits, or intends to submit, a Proposal in response to this RFP.

g. **"PGE"** refers to Portland General Electric.

h. **"Intent to Award"** means a written notice identifying the Offeror that PGE intends to award the Contract. PGE will issue the Intent to Award notice to Offerors by email.

i. **"Proposal"** means an Offeror's complete and binding response to this RFP, including its Technical Proposal, Financial Proposal, certifications, representations, and all required supporting documentation.

j. **"Proposal Closing Date"** means the date and time by which Proposals must be received, as stated on the cover page of this Solicitation, as may be amended by written addendum.

k. **"Responsive Proposal"** means a Proposal that complies in all material respects with the requirements of this Solicitation and satisfies all Mandatory Evaluation Criteria.

l. **"Responsible Offeror"** means an Offeror that PGE determines possesses the integrity, experience, technical capability, financial capacity, personnel, resources, and ability necessary to perform the Contract successfully.

m. **"Statement of Work" or "SOW"** means Annex A, which identifies the Services, tasks, milestones, Deliverables, acceptance criteria, and other performance requirements applicable to the Contract.

n. **"SPOC"** means the Single Point of Contact identified on the cover page of this Solicitation and described in Section 1.10.

o. **"Technical Score," "Price Score," "Interview Score," "Pre-Interview Score," and "Final Combined Score"** have the meanings stated in Section 4.

10. SPOC

All correspondence related to this RFP must be directed to the SPOC listed below:

Email: pgesolicitations@pgn.com

Offerors must submit their Proposal and all RFP-related correspondence to the SPOC identified above. To ensure proper and timely consideration of Proposals, all contact regarding this RFP, whether by phone or email, must be directed exclusively to the SPOC for the duration of the RFP process.

Offerors who contact PGE personnel other than the SPOC regarding this RFP, without prior SPOC approval, risk having their Proposal disqualified.

SECTION 2: OFFEROR INSTRUCTIONS

1. Standard Instructions, Clauses and Conditions

By submitting a Proposal, the Offeror agrees to be bound by the instructions, clauses and conditions of this Solicitation and accepts the terms and conditions of the resulting Contract.

2. Questions During the Solicitation Period

All inquiries must be submitted in writing to the SPOC no later than November 23, 2026. Inquiries received after this deadline may not be answered.

Offerors should reference the relevant section title and page number when submitting inquiries and provide sufficient detail to allow PGE to provide an accurate response. Inquiries of a proprietary nature must be clearly marked "Proprietary" at each relevant item and will be treated as such, unless PGE determines otherwise. PGE may edit questions, or request that the Offeror do so, to remove proprietary content so that responses can be shared with all Offerors. Inquiries that cannot be distributed to all Offerors may not be answered.

3. Objections to Annex H – Master Purchase Agreement for Services Template

Annex H – Master Purchase Agreement for Services Template contains PGE's required contractual terms and conditions. Annex H will not be subject to negotiation or modification after the Proposal Closing Date.

An Offeror that objects to any provision of Annex H must submit its objection in writing to the SPOC no later than November 23, 2026, at 5:00 p.m. PST. Each objection must:

- identify the specific section and provision of Annex H at issue;
- describe the basis for the objection; and
- provide the Offeror's proposed alternative language or requested revision.

PGE will review timely submitted objections and may accept, reject, or modify a requested revision in its discretion. Submission of an objection does not modify Annex H and does not constitute PGE's acceptance of the proposed revision.

If PGE determines that Annex H should be revised as a result of an objection, PGE will issue the revision through a written RFP addendum before the Proposal Closing Date, and the revised Annex H will apply to all Offerors.

After November 23, 2026, PGE will not consider additional requested revisions, exceptions, qualifications, modifications, substitutions, or alternative terms relating to Annex H.

By submitting a Proposal, the Offeror agrees to accept Annex H as finally issued by PGE through any applicable RFP addenda, without exception, qualification, modification, or substitution. A Proposal containing an exception to Annex H or conditioning performance on different or additional terms will be deemed nonresponsive.

Annex I – Acceptance and Exception List is not subject to the objection process described in this Section. Requested exceptions to Annex I must be submitted in accordance with Section 11 of Annex I. PGE may accept or reject a requested exception or address it through Negotiations conducted in accordance with this Solicitation. A Proposal that is conditioned upon PGE's acceptance of a requested exception to Annex I may be deemed nonresponsive.

4. Suggested Improvements to the Requirements During the Solicitation Period

If an Offeror believes that the SOW or another requirement of this Solicitation could be improved technically, operationally, or economically, the Offeror may submit a written suggestion to the SPOC. The suggestion must identify the applicable RFP or SOW section, describe the proposed improvement, and explain its anticipated benefit.

Suggestions must be submitted by the deadline and in accordance with the process established in Section 2.2. PGE may accept, reject, or modify a suggestion at its discretion. A suggestion will not modify this Solicitation unless PGE adopts it through a written addendum made available to all Offerors.

PGE will not adopt a suggestion that would improperly restrict competition or provide an unfair competitive advantage.

5. Existing NDAs

For purposes of this Solicitation, an Offeror will not be considered in violation of any confidentiality provision in an existing nondisclosure agreement with PGE if the Offeror reports fraud, waste, or abuse to an authorized representative of a federal department or agency.

6. Validity of Proposals

Proposals must remain valid for a minimum of one hundred eighty (180) calendar days following the Proposal Closing Date. Proposals may not be withdrawn, modified, or replaced after the Proposal Closing Date except in response to a written request issued by PGE in accordance with the Clarification or Discussion procedures stated in this Solicitation.

7. Disclaimer

This RFP does not obligate PGE to enter into any Contract and does not serve as a basis for any claim for reimbursement of costs incurred by the Offeror. PGE reserves the right to revise, withdraw, or cancel this RFP at any time before Contract award. Any revision to the Solicitation before the Proposal Closing Date will be made only through a written addendum issued in accordance with Section 2.26.

8. Reservation of Rights

Subject to applicable federal requirements and the procedures stated in this Solicitation, PGE reserves the right to:

a. Reject any or all Proposals;
b. Reject a Proposal as nonresponsive;
c. Determine that an Offeror is not responsible;
d. Waive a minor informality or immaterial irregularity that does not affect price, quantity, quality, delivery, the evaluation outcome, or the relative standing of Offerors;
e. Request clarifications in accordance with this Solicitation;
f. Conduct interviews or decline to conduct interviews;
g. Cancel this Solicitation before Contract award;
h. Award the Contract to an Offeror other than the lowest-priced Offeror when the award is made in accordance with the evaluation criteria, scoring methodology, and relative weights stated in this Solicitation; or
i. Make no award.

PGE anticipates making no more than one (1) Contract award under this Solicitation. Nothing in this section authorizes PGE to change the evaluation criteria, scoring methodology, relative weights, or material requirements after the Proposal Closing Date.

9. Return of Materials

PGE may, at its discretion, require the Offeror to return or destroy any PGE documentation or materials related to this RFP at any time.

10. Errors and Omissions

If an Offeror identifies a material ambiguity, conflict, discrepancy, omission, or error in this RFP, the Offeror must:

1. Notify the SPOC in writing; and
2. Request a modification or clarification.

PGE reserves the right to determine the materiality of any such discovery. PGE may take one or more of the following actions:

- Issue an addendum to amend the RFP;
- Extend the Proposal Closing Date, if necessary; or
- Provide written responses to questions.

PGE may address minor informalities or immaterial irregularities in accordance with the Clarification procedures stated in this Solicitation, provided doing so does not prejudice other Offerors or affect the evaluation outcome or relative standing of Offerors.

11. Confidentiality of Response

Unless a nondisclosure agreement has been executed between PGE and the Offeror, all information submitted in the Offeror's response, regardless of any confidentiality labeling, may be disclosed or used by PGE or its affiliates for any purpose without compensation or liability to the Offeror.

The Offeror should submit only the information necessary to understand and evaluate its Proposal. Where a nondisclosure agreement exists, it will govern the confidentiality of covered information; however, all information submitted under this RFP is subject to inspection by the DOE.

Information submitted under this RFP may be disclosed to DOE, another federal awarding or oversight agency, PGE's auditors, or another authorized governmental representative to the extent required for review, audit, investigation, administration, or oversight of the applicable federal award. PGE will handle information in accordance with any applicable NDA, law, federal-award requirement, and lawful governmental-access obligation. An Offeror should clearly identify information it considers confidential or proprietary, but such marking does not limit a lawful governmental right of access.

12. Offeror Financial Capability

The SPOC will obtain the financial and other information necessary to assess an Offeror's financial capability and condition. Offerors are expected to provide all reasonably requested financial information in a timely manner. Failure or unwillingness to do so may be considered a material factor in determining the Offeror's responsibility and ability to complete the Contract.

Financial Capacity. In determining whether an Offeror has sufficient financial capacity to perform the Contract, PGE may consider the Offeror's liquidity, working capital, cash flow, net worth, leverage, operating results, material financial obligations, auditor qualifications or going-concern disclosures, and other information reasonably relevant to the Offeror's ability to perform the Contract. Where an Offeror relies on the financial resources of a parent or other affiliated entity, PGE may consider the financial capacity of that entity and any proposed guarantee or other commitment of financial support.

PGE may request clarification or additional financial information reasonably necessary to complete its responsibility determination. Financial capacity is not point-rated and will not be included in the calculation of the Offeror's Technical Score, Price Score, or Interview Score.

13. Competitive Procurement

PGE encourages free and open competition among Offerors. PGE has no obligation to purchase any services from an Offeror unless and until a Contract is executed by both parties.

14. Code of Ethics

From the receipt of this Solicitation through final selection, Offerors must not engage in any conduct that could be perceived as improperly influencing PGE's decision-making process. The exchange or offering of money, gifts, personal services, or unusual hospitality between Offerors and PGE is strictly prohibited. Failure to comply with this requirement may result in disqualification from this RFP.

Offerors shall not seek or obtain non-public information regarding the procurement process, competing Proposals, evaluation team members, evaluation results, or source selection activities. Any attempt to improperly influence the procurement process may result in disqualification.

15. Non-Discrimination

Neither PGE nor the Contractor shall discriminate in the performance or provision of Services under the resulting Contract on the basis of age, race, color, national origin, religion, sex, disability, veteran or military status, or any other category protected by applicable law.

16. Conflict of Interest

The Offeror shall disclose any actual, potential, or perceived conflict of interest that may impact its ability to perform the Services objectively and impartially.

Examples include, but are not limited to:

a. Any direct or indirect financial interest in the Project, the Contract, or any entity that may benefit from the award of the Contract or the outcome of the Project;
b. Participation in project planning, project development, environmental review, preparation of Project requirements, specifications, Statements of Work, evaluation criteria, or other procurement documents related to the Project;

c. Business, contractual, or personal relationships that could impair the Offeror's independent judgment or create an unfair competitive advantage; and

d. Any organizational conflict of interest or other circumstance that could impair the Offeror's objectivity or create an unfair competitive advantage.

An Offeror that developed or drafted the specifications, requirements, Statement of Work, or solicitation documents for this procurement will be excluded from competing to the extent required by 2 CFR § 200.319(b).

PGE may require mitigation measures, disqualify an Offeror, or take any other action it determines appropriate to address a conflict of interest.

Failure to disclose a known conflict of interest may result in disqualification from this Solicitation or termination of any resulting Contract.

17. Proposal Preparation Costs

The Offeror is solely responsible for all costs and expenses incurred in preparing and presenting its response to this RFP, including costs associated with market research and attendance at meetings.

18. Qualification of Offeror's Resources

Prior to assigning any individual as a resource, and at the Offeror's sole expense, the Offeror must verify and warrant to PGE that all proposed personnel possess the requisite qualifications, education, and technical certifications to perform the services competently and in accordance with the SOW.

PGE reserves the right to accept or reject any resources identified in the Offeror's Proposal. All proposed personnel and their associated roles must be clearly identified at the task level in the Proposal. PGE reserves the right to request alternate resources.

19. Publicity

The Offeror may not make any announcement, disclosure, or use PGE's name or logo in connection with this RFP without prior written consent from PGE. PGE may withhold such consent at its sole discretion.

20. Compliance with Applicable Laws

The Offeror shall comply with all applicable federal, state, and local laws, regulations, orders, permits, and grant requirements relevant to the Proposal and performance of the Services.

21. Contract Negotiation

PGE may negotiate with the highest-ranked responsive and responsible Offeror regarding matters permitted under this Solicitation, including implementation details, pricing, schedules, and other matters PGE determines appropriate. Annex H - Master Purchase Agreement for Services Template, as finally issued through any applicable RFP addenda, will not be subject to negotiation, exception, qualification, modification, substitution, or the addition of alternative terms after the deadline established in Section 2.3.

22. Disputes

PGE shall review and resolve procurement-related disputes in accordance with the procedures described in this Solicitation and applicable Project requirements. Nothing in this section shall limit any rights or remedies otherwise available under applicable law.

23. Proposal Withdrawal

An Offeror may withdraw its Proposal at any time prior to the Proposal Closing Date and time shown on the cover page of this Solicitation. Withdrawals must be submitted in writing on company letterhead, signed by an authorized representative, and sent electronically to the SPOC before the Proposal Closing Date and time.

24. Authority

Proposals must conform to the requirements of this Solicitation and be signed by an individual authorized to make commitments on behalf of the Offeror. The Offeror's signature on any submission or attestation form certifies that the Offeror has read and fully understands all terms and conditions. No consideration will be given to any claim resulting from a failure to comprehend all Solicitation requirements.

25. Responsiveness

Proposals lacking required signatures will be deemed nonresponsive. PGE may exclude a nonresponsive Proposal from further evaluation.

26. RFP Amendments

PGE reserves the right to amend this RFP. All changes will be made by written addendum only. Verbal statements made by the SPOC are not binding unless issued as a written addendum. PGE will issue addenda within a reasonable timeframe to allow Offerors adequate time to incorporate changes into their Proposals. PGE may extend the Proposal Closing Date if additional time is needed to review and respond to addenda. It is the Offeror's sole responsibility to regularly check the PGE website for any posted addenda and to incorporate them into its Proposal.

27. Debarment and Suspension

By submitting a Proposal, the Offeror warrants that it is not listed on the government-wide exclusions in the System for Award Management (SAM), in accordance with OMB guidelines at 2 CFR 180, implementing Executive Orders 12549 and 12689 regarding Debarment and Suspension.

28. Unpaid Tax Liabilities Prohibited

By submitting a Proposal, the Offeror represents and warrants that: (a) it has no unpaid federal tax liabilities for which all judicial and administrative remedies have been exhausted or lapsed; or (b) if unpaid tax liabilities exist, they are being paid in a timely manner pursuant to an agreement with the relevant tax authority.

29. Felony Criminal Convictions Prohibited

By submitting a Proposal, the Offeror represents and warrants that it has not been convicted of a felony criminal violation under any Federal law within the preceding twenty-four (24) months.

30. Protest of Intent to Award

PGE will notify all Offerors when a selection has been made. The following procedure applies when an Offeror wishes to protest a disqualification or Contract award decision.

An Offeror may protest a disqualification or Contract award decision only on one or more of the grounds identified below. A protest must identify the specific basis for the protest and cite the applicable provision of the Solicitation or specific law, rule, regulation, or procedure that the Offeror alleges PGE failed to follow. Mere disagreement with the judgment, scoring, or conclusions of individual evaluators is not grounds for protest.

All protests must be in writing and must include the following:

1. A statement that the Offeror is adversely affected by the disqualification or Contract award decision and would be eligible for Contract award if the protest were upheld; and

2. The specific basis for the protest, which must be one or more of the following:

    a) PGE failed to evaluate Proposals in accordance with the criteria or processes described in the Solicitation; or

    b) PGE abused its discretion in determining that the protesting Offeror's Proposal was nonresponsive.

All protests must be submitted electronically to the SPOC identified on the cover page of this Solicitation and must be received no later than **4:00 p.m. PST on the seventh (7th) business day** following PGE's issuance of the applicable Intent to Award or notice of disqualification.

Protests received after this deadline will be dismissed without further consideration. A protest that fails to provide the required basis will be dismissed without further consideration.

Issues that were known, or reasonably should have been known, during the Solicitation period and could have been raised before the applicable Solicitation deadline may not subsequently be raised as a protest of a disqualification or Contract award decision.

PGE will review all timely and properly submitted protests and will issue a written decision to the protesting Offeror within a reasonable timeframe.

SECTION 3: PROPOSAL PREPARATION INSTRUCTIONS

1. Proposal Preparation Instructions

This section outlines the required format for Proposals in response to this RFP. The purpose of this format is to ensure consistency across all submissions and to facilitate clear understanding and evaluation. Failure to comply with the requirements of this section may result in the Proposal being deemed nonresponsive.

Offerors must follow the format instructions below when preparing their Proposals:

i. Use a numbering system that corresponds to the RFP;

ii. Include a title page at the front of each separate PDF document that includes the title, date, RFP Solicitation number, Offeror's legal name and address, and contact information for the Offeror's authorized representative; and

iii. Annexes C and D are provided as templates illustrating the minimum information required to satisfy the Mandatory Evaluation Criteria and Point-Rated Evaluation Criteria. Offerors are not required to use the Annex C or Annex D formats and may submit responses in their own format. However, Offerors must clearly identify where each requirement is addressed in their Proposal and must provide the required cross-references to the applicable Proposal pages. PGE will evaluate Proposals based on the information submitted, regardless of format.

2. Submission of Proposals

Proposals must be submitted to the designated SPOC by the date and time specified on the cover page of this Solicitation. Offerors must email all required documents and any relevant supplementary materials to the SPOC using the following subject line:

"RFP # PGE01-GID02-SH-001 – Meter Installation Vendor Services for the Next Generation AMI Program"

Proposals are due no later than 5:00 p.m. PST on December 21, 2026.

Please limit the size of each email to 10MB. Multiple emails may be used if necessary. The PGE SPOC will confirm receipt of all submissions via email.

Any Proposal received after 5:00 p.m. PST on the Proposal Closing Date, or submitted in a manner not specified in this RFP, will be considered nonresponsive and will be excluded from award consideration. It is the Offeror's sole responsibility to ensure that the Proposal is submitted before the specified due date and time and in the manner specified in this RFP.

IMPORTANT: IF AN OFFEROR DOES NOT RECEIVE CONFIRMATION FROM THE SPOC ACKNOWLEDGING RECEIPT OF THE PROPOSAL, THE OFFEROR MUST ASSUME THAT THE PROPOSAL WAS NOT RECEIVED AND MUST CONTACT THE SPOC TO CONFIRM RECEIPT PRIOR TO THE PROPOSAL CLOSING DATE AND TIME.

Proposals submitted by facsimile or mail will not be accepted.

Offerors must submit the documents listed below as separate files in the formats specified below. Upon award, portions of the submitted Proposal may be incorporated into the resulting Contract.

1. **Annex B – Basis of Payment**

- Offerors must submit Annex B in its original Microsoft Excel format.
- Offerors may also submit a PDF copy for reference; however, the completed Excel workbook will control for evaluation purposes.
- Pricing information must appear only in the Financial Proposal and must not appear elsewhere in the Proposal.

2. **Annex C – Mandatory Evaluation Criteria**
    - Submit as a separate PDF file.

3. **Annex D – Point-Rated Evaluation Criteria**
    - Submit as a separate PDF file.

4. **Annex E - Contractor Representation and Certification**
    - Submit as a separate signed PDF file.

5. **Annex F – Non-Collusion Certification**
    - Submit as a separate signed PDF file.

6. **Annex G - Byrd Anti-Lobbying Amendment Certification**
    - Submit as a separate signed PDF file.

7. **Annex I – Acceptance and Exception List**
    - Submit the completed and signed Offeror Acceptance and Requested Exceptions table (Annex I, Section 11) as a separate PDF file.
    - Annex I may not be used to request an exception, qualification, modification, substitution, or alternative term relating to Annex H. Objections to Annex H are governed exclusively by Section 2.3.

3. Technical Proposal

The technical portion of this Solicitation consists of the following:

- **Mandatory Evaluation Criteria** – Refer to Annex C of this Solicitation; and
- **Point-Rated Evaluation Criteria** – Refer to Annex D of this Solicitation.

Substantiation of Technical Compliance: The Offeror must substantiate its compliance with the Mandatory Evaluation Criteria in Annex C and should provide sufficient information to address the Point-Rated Evaluation Criteria in Annex D, in accordance with the applicable Proposal Preparation Instructions. Substantiation should do more than restate a requirement or simply assert compliance. The Proposal should provide sufficient information to demonstrate how the Offeror satisfies the applicable Mandatory Evaluation Criteria and to support evaluation of the Point-Rated Evaluation Criteria. A statement that the Offeror or its proposed solution "complies" is not sufficient. Failure to adequately substantiate compliance with a Mandatory Evaluation Criterion will result in the Proposal being deemed nonresponsive, except where PGE determines that a minor informality or immaterial irregularity may be waived under this Solicitation.

Failure to adequately substantiate a Point-Rated Evaluation Criterion may result in a lower score for that criterion.

Annexes C and D are provided for convenience and are not mandatory response templates. Offerors may use alternative formats, provided all requested information is submitted and clearly cross-referenced to the applicable criterion.

Cross-References: Offerors must provide precise cross-references for all supporting documentation, whether using the Annex C and Annex D templates or an alternative response format. Each cross-reference must identify the document title and applicable page and paragraph or section number. If the Offeror uses an Annex C or Annex D template, the cross-reference must be entered in the applicable "Cross-Reference" column.

Joint Venture: Unless otherwise specified, each Mandatory Evaluation Criterion must be independently satisfied by at least one member of a joint venture. Different joint venture members may satisfy different Mandatory Evaluation Criteria; however, joint venture members may not combine or pool their qualifications, experience, financial capacity, or other capabilities to collectively satisfy a single Mandatory Evaluation Criterion. Where substantiation of a Mandatory Evaluation Criterion is required, the Offeror must identify the joint venture member that independently satisfies that criterion.

4. Financial Proposal

Pricing: Offerors must submit their Financial Proposal in accordance with Annex B, Basis of Payment. PGE will calculate each Offeror's Total Evaluated Price using the evaluated quantities and pricing methodology stated in Annex B.

Inclusion of optional Services in the Total Evaluated Price is for evaluation purposes only and does not obligate PGE to authorize or purchase those Services. PGE may authorize all, some, or none of the optional Services during the Contract term.

Offerors must identify all pricing assumptions in the Assumptions worksheet of Annex B. An assumption may explain how the Offeror developed its pricing but may not modify the RFP, condition the Proposal, alter a required price, limit the Offeror's obligation to perform a requirement, or override the proposed Contract.

Blank Prices: Offerors must complete every required pricing field in Annex B. If an item is included in another price or will be provided at no additional charge, the Offeror must enter $0.00.

A blank required pricing field may render the Proposal nonresponsive. PGE may request a Clarification only to confirm information already evident from the Proposal and will not permit an Offeror to add or revise pricing after the Proposal Closing Date except through Discussions or a request for final Proposal revisions conducted in accordance with this Solicitation.

5. RFP and Contract Award Timeline

PGE's estimated schedule for this Solicitation is provided in the table below. This timeline is subject to change and will be updated as needed.

Date	Activity
November 4, 2026	RFP published on the PGE public-facing website
November 23, 2026	Deadline for Offeror questions and requests for clarification
November 23, 2026	Deadline for objections to Annex H - Master Purchase Agreement for Services Template **by 5:00 p.m. PST**
December 8, 2026	PGE responses to Offerors' questions and clarification requests issued
December 21, 2026	Proposals due **by 5:00 p.m. PST**
February 5, 2027	Proposals evaluated; Offerors selected for interviews, if conducted
February 26, 2027	Evaluated interviews, which may include presentations, demonstrations, or question-and-answer sessions, completed. Reference checks completed (if required).

Date	Activity
March 19, 2027	Completion of Discussions and submission of Best and Final Offers (BAFOs), if requested by PGE.
April 2, 2027	Intent to Award issued to all Offerors
April 30, 2027	Contract negotiations completed
May 21, 2027	Contract finalized and executed

The following factors may impact the timeline above:

i. **Requests for clarifications:** PGE may request a Clarification to explain, verify, or resolve an ambiguity in information already contained in a Proposal. Unless PGE specifies a longer period in writing, the Offeror must respond within two (2) Business Days after receipt of the request.

A Clarification response:

a) Must be limited to explaining or verifying information already contained in the Proposal;
b) May not introduce a new project example, new Key Person, subcontractor, technical approach, or other material information;
c) May not change the proposed price;
d) May not cure a failure to satisfy a Mandatory Evaluation Criterion as of the Proposal Closing Date; and
e) Will become part of the Offeror's Proposal and the procurement record.

PGE will provide similarly situated Offerors a fair and consistent opportunity to respond to materially similar clarification issues. Failure to respond within the specified period may result in PGE evaluating the Proposal without the requested clarification or determining that the Proposal is nonresponsive if the missing or unclear information is material.

ii. **Extension of Time:** The SPOC may extend the deadline for responding to a Clarification by written notice. Any extension of the Proposal Closing Date or another Solicitation-wide deadline will be issued through a written addendum made available to all Offerors.

iii. **Discussions:** Discussions, if conducted, will be governed by Section 4.5.

iv. **Funder Approval Requirements:** The grant funder may have additional approval requirements that could affect the timeline. PGE will notify the successful Offeror of any such impacts as soon as practicable.

SECTION 4: EVALUATION PROCEDURES AND BASIS OF SELECTION

1. Evaluation Procedures

Proposals will be evaluated against the full requirements of this Solicitation, including both technical and financial criteria. The evaluation process consists of several steps, as described below. PGE's progression to a later step does not indicate that an Offeror has conclusively passed all previous steps. PGE may conduct evaluation steps concurrently.

Although certain Services are identified as optional, pricing and technical qualifications for those Services will be considered in PGE's evaluation as provided in this Solicitation. The designation of a Service as optional means that PGE is not obligated to authorize or purchase that Service and does not exclude the Service from the Total Evaluated Price or technical evaluation.

Depending on the results of the evaluation, PGE may establish a competitive range, conduct Discussions, and request Best and Final Offers ("BAFOs") in accordance with Section 4.5.

An evaluation team composed of representatives from PGE will evaluate all Proposals. PGE may engage independent consultants or utilize internal PGE resources to assist in the evaluation.

Clarifications will be conducted in accordance with Sections 3.5 and 4.5.

2. Technical Evaluation

Mandatory Evaluation Criteria: Each Proposal will be reviewed to determine whether it meets all Mandatory Evaluation Criteria identified in Annex C. Requirements expressly identified in Annex C as Mandatory Evaluation Criteria are pass/fail requirements. A Proposal that fails to satisfy a Mandatory Evaluation Criterion will be deemed nonresponsive and will not proceed to point-rated evaluation. PGE may waive only a minor informality or immaterial irregularity in accordance with this Solicitation.

Point-Rated Evaluation Criteria: Requirements contained in Annex D are point-rated and will be evaluated in accordance with the scoring methodology stated in Annex D. Failure to fully address a Point-Rated Evaluation Criterion may result in a reduced score but will not, by itself, render a Proposal nonresponsive, unless the Solicitation expressly states that failure to comply with a particular requirement will result in nonresponsiveness.

Reference Checks:

PGE may conduct reference checks for any Offeror at any stage of the evaluation process. Reference checks may be conducted using references provided by the Offeror or through other sources known to PGE.

Reference checks may include evaluation of:

- Overall project performance and customer satisfaction;
- Project management effectiveness, reporting quality, and administrative performance.
- Schedule performance, including achievement of milestones and sustained production rates.
- Quality performance, including installation accuracy, audit results, rework rates, and asset handling practices.
- Safety performance and adherence to applicable safety requirements.
- Customer service performance, including complaint management and resolution.
- Responsiveness to client requirements and effectiveness of issue resolution.
- Budget management and change-order administration.
- Post-deployment support, warranty performance, and corrective work activities.

Information obtained through reference checks may be considered in PGE's determination of whether the Offeror is responsible and may be used to verify information contained in the Proposal. Reference-check information will not be used to introduce an evaluation criterion or relative weighting not disclosed in this Solicitation.

If PGE is unable to successfully contact one or more references provided by the Offeror, PGE may request alternate references. Failure of a reference to respond shall not, by itself, render a Proposal nonresponsive.

3. Financial Evaluation

PGE will evaluate pricing in accordance with Annex B, Basis of Payment. Each Offeror's Total Evaluated Price will be calculated using the evaluated quantities, unit prices, assumptions, and methodology set forth in Annex B.

Evaluated quantities are provided solely to establish a common basis for comparing Proposals and do not represent estimated, minimum, or guaranteed purchase quantities.

Pricing for Optional Services will be included in the Total Evaluated Price as specified in Annex B. Inclusion of Optional Services in the Total Evaluated Price does not obligate PGE to authorize or purchase those Services.

4. Method of Scoring - Highest Combined Technical Score, Price Score, and Interview Score

I. Responsiveness Requirements:

To be deemed responsive, a Proposal must:

i. Comply in all material respects with the requirements of this Solicitation; and
ii. Satisfy all Mandatory Evaluation Criteria.

Proposals that do not satisfy both conditions above will be declared nonresponsive and will not be evaluated further, except that PGE may waive a minor informality or immaterial irregularity in accordance with this Solicitation.

II. Pre-Interview Selection:

The initial selection will be based on the highest combined technical score and price score, weighted as follows:

- **Technical (Point-Rated Evaluation Criteria):** 50 points
- **Price:** 30 points
- **Total Pre-Interview Points:** 80 points

III. Technical Score:

The Technical Score for each responsive Proposal will be calculated as follows:

Technical Score = (Average Raw Technical Score ÷ Maximum Available Technical Points) × 50

"Average Raw Technical Score" means the average of the evaluators' final individual raw technical scores.

IV. Pricing Score Calculation:

The Price Score for each responsive Proposal will be calculated using the Total Evaluated Price determined under Section 4.3:

Price Score = (Lowest Total Evaluated Price ÷ Offeror's Total Evaluated Price) × 30

V. Pre-Interview Score:

The Technical Score and Price Score will be combined to establish a Pre-Interview Score. The Pre-Interview Score will be calculated as follows:

Pre-Interview Score = Technical Score + Price Score

Offerors will be ranked based on their Pre-Interview Scores for purposes of determining which Offerors, if any, will be invited to an interview. Selection for an interview does not guarantee Contract award.
If PGE elects not to conduct interviews, award may be made to the responsive and responsible Offeror achieving the highest Pre-Interview Score, subject to successful negotiations and satisfaction of all other requirements of this Solicitation.

VI. Interview Evaluation:

PGE may invite the highest-ranked Offerors deemed reasonably competitive for award, but anticipates inviting no more than five (5). In the event of a tie affecting interview selection, all tied Offerors may be invited to participate.

Interviews may be used to evaluate the following:

- Understanding of the Project requirements;
- Proposed approach and methodology;
- Relevant experience and qualifications of key personnel;
- Ability to respond to project-specific scenarios and questions;
- Project execution capabilities; and
- Overall capability to successfully perform the work.

The Interview Score will be determined in accordance with the interview evaluation criteria set forth in the RFP. The interview will not result in a re-evaluation of the written Proposal or a revision to the Technical Score.

PGE will develop interview questions, scenarios, demonstrations, presentations, and other evaluation materials to further assess these factors.

PGE may require invited Offerors to participate in presentations, demonstrations, workshops, or other interview activities designed to assess the interview factors identified above. PGE will provide instructions and an agenda before the interview session.

Interview sessions may be conducted in person, virtually, or through a combination of both methods.

The raw interview evaluation may use a maximum number of points established in the Interview Evaluation Guide. The resulting raw score will be normalized to a maximum Interview Score of twenty (20) points using the formula stated below.

Interview Score = (Average Raw Interview Score ÷ Maximum Raw Interview Points Established in the Interview Evaluation Guide) × 20

"Average Raw Interview Score" means the average of the evaluators' final individual raw interview scores.

Prior to the commencement of interviews, PGE will establish an Interview Evaluation Guide further describing the evaluation methodology applicable to the Interview Score. The Interview Evaluation Guide will provide administrative instructions and further define the interview factors disclosed in this Solicitation but shall not introduce new evaluated factors or subfactors. Any such Interview Evaluation Guide shall be applied consistently to all interviewed Offerors and shall not alter the maximum Interview Score of twenty

(20) points, the interview factors identified in this Solicitation, or the relative weighting of the Technical Score (50 points), Price Score (30 points), and Interview Score (20 points), or the basis upon which interviewed Offerors are comparatively evaluated.

VII. Final Combined Score:

If interviews are conducted, the Final Combined Score for each interviewed Offeror will be calculated as follows:

Final Combined Score = Technical Score + Price Score + Interview Score

The maximum available score is 100 points:

- Technical Score: 50 points
- Price Score: 30 points
- Interview Score: 20 points

The Contract may be awarded to the responsive and responsible Offeror whose Proposal represents the best value to PGE based on the evaluation criteria and scoring methodology set forth in this Solicitation.

Illustrative Example Only. The table below illustrates a scoring example in which all three Proposals are responsive and the lowest evaluated price is $45,000. This example does not represent anticipated Proposal prices or evaluation results.

Method of Award – Highest Combined Technical Score (50), Price Score (30), Interview Score (20)	**Bidder A**	**Bidder B**	**Bidder C**
Mandatory Criteria (Pass/Fail)	PASS	PASS	PASS
Technical Score (Point-Rated Criteria) [(Average Raw Technical Score ÷ Maximum Available Technical Points) × 50]	(400 ÷ 500) × 50 = 40.00	(300 ÷ 500) × 50 = 30.00	(200 ÷ 500) × 50 = 20.00
Total Evaluated Price	$90,000	$45,000	$80,000
Price Score [(Lowest Total Evaluated Price ÷ Offeror's Total Evaluated Price) × 30]	(45,000 ÷ 90,000) × 30 = 15.00	(45,000 ÷ 45,000) × 30 = 30.00	(45,000 ÷ 80,000) × 30 = 16.88
Pre-Interview Score (Technical Score + Price Score)	40.00 + 15.00 = 55.00	30.00 + 30.00 = 60.00	20.00 + 16.88 = 36.88
Selected for Interview	Yes	Yes	No
Interview Score [(Average Raw Interview Score ÷ Maximum Raw Interview Points) × 20]	(25 ÷ 25) × 20 = 20.00	(14 ÷ 25) × 20 = 11.20	N/A
Final Combined Score (Technical Score + Price Score + Interview Score)	75.00	71.20	N/A
Final Ranking	1st Place	2nd Place	Not Selected for Final Evaluation

Note 1: Maximum available points: 100 (Technical 50, Price 30, Interview 20).

Note 2: In this example, Bidder B achieved the highest Pre-Interview Score (60.00). For illustrative purposes, PGE elected to interview the two highest-ranked Offerors. Following interviews, Bidder A achieved the highest Final Combined Score (75.00) and ranked first for purposes of the final evaluation.

Note 3: For purposes of this example, the Maximum Raw Interview Points are 25.

5. PGE Rights; Clarifications, Interviews, Discussions, and Negotiations

PGE reserves the right to:

a. Award the Contract without conducting interviews;
b. Conduct interviews with selected Offerors in accordance with the process disclosed in this Solicitation;
c. Request Clarifications;
d. Establish a competitive range and conduct Discussions if PGE determines that Discussions are necessary;
e. Request final Proposal revisions following Discussions;
f. Negotiate with the highest-ranked responsive and responsible Offeror;
g. Reject any or all Proposals; or
h. Cancel the Solicitation before Contract award.

Clarifications. PGE may request Clarifications in accordance with Section 3.5.

Interviews. If PGE conducts interviews, PGE will use the interview factors, scoring methodology, and relative weights disclosed in this Solicitation. All interviewed Offerors will be provided materially equivalent instructions, preparation time, interview duration, and opportunities to respond to the evaluated questions or scenarios. Interview questions may be tailored to an Offeror's Proposal, but all Offerors will be evaluated against the same disclosed factors.

Discussions. If PGE conducts Discussions that permit material Proposal revisions, PGE will:

1. Establish a competitive range using the evaluation criteria and scoring methodology disclosed in this Solicitation;
2. Conduct Discussions on a fair and consistent basis with all Offerors remaining in the competitive range;
3. Identify material deficiencies, significant weaknesses, or other matters requiring resolution, without disclosing another Offeror's confidential information or proposed solution;
4. Establish a common deadline for final Proposal revisions; and
5. Evaluate final Proposal revisions using the same evaluation criteria, scoring methodology, and relative weights disclosed in this Solicitation.

Best and Final Offers. Following Discussions, PGE may request Best and Final Offers ("BAFOs") from Offerors remaining in the competitive range. Any request for a BAFO will identify:

- The information subject to revision;
- The submission requirements; and
- The due date for submission.

BAFOs may include revisions to:

- Pricing;
- Technical approaches;
- Staffing plans;
- Service levels;
- Deployment strategies; and
- Other Proposal elements identified by PGE.

BAFOs will be evaluated using the evaluation criteria, scoring methodology, and relative weights disclosed in this Solicitation. To the extent an Offeror revises pricing, technical information, staffing, implementation plans, or other Proposal elements, PGE may revise the corresponding evaluation scores affected by those changes. No new evaluation criteria or evaluation weights shall be introduced through the BAFO process.

Negotiations. After completion of the evaluation process, PGE may negotiate with the highest-ranked responsive and responsible Offeror. Negotiations may address Contract terms, implementation details,

pricing, risk allocation, scheduling, and other matters consistent with the Solicitation. Negotiations may not change the disclosed evaluation criteria or result in a material expansion of the Services. If PGE and the highest-ranked Offeror do not execute a Contract, PGE may terminate negotiations and commence negotiations with the next highest-ranked responsive and responsible Offeror. Negotiations may not reopen or modify Annex H as finally issued by PGE through any applicable RFP addenda.

ANNEX A – STATEMENT OF WORK

The Statement of Work (Annex A) will be provided to prospective Offerors as a separate attachment.

ANNEX B – BASIS OF PAYMENT

The Basis of Payment (Annex B) will be provided to prospective Offerors as a separate attachment.

ANNEX C - MANDATORY EVALUATION CRITERIA

BIDDER RESPONSE REQUIREMENT
The Proposal must meet all Mandatory Criteria identified below. To demonstrate compliance, the Offeror must provide the documentation specified in the "Proposal Preparation Instructions" column for each criterion. Offerors should address each Mandatory Criterion separately and provide a cross-reference to the applicable page(s) in their Proposal.

PASS / FAIL NOTICE
A Proposal that fails to satisfy a Mandatory Evaluation Criterion will be deemed nonresponsive and will not proceed to point-rated evaluation. PGE may waive only a minor informality or immaterial irregularity in accordance with this Solicitation.

M1 |	
MANDATORY CRITERIA The Offeror must be legally eligible to contract with PGE and must obtain any registration or authorization required to conduct business in Oregon as of the Proposal Closing Date.	**PROPOSAL PREPARATION INSTRUCTIONS** The Offeror must identify its current Oregon registration status.
CROSS-REFERENCE TO SPECIFIC PAGE IN PROPOSAL [OFFEROR TO COMPLETE] Page(s): _____	**PASS / FAIL [PGE EVALUATORS TO COMPLETE]** ☐ PASS ☐ FAIL Initials: _____

M2 |	
MANDATORY CRITERIA The Offeror must be registered in the System for Award Management (SAM) and possess an active Unique Entity Identifier (UEI) as of the Proposal Closing Date.	**PROPOSAL PREPARATION INSTRUCTIONS** The Offeror must provide its UEI number and evidence of an active SAM registration.

M2 |	
CROSS-REFERENCE TO SPECIFIC PAGE IN PROPOSAL [OFFEROR TO COMPLETE] Page(s): _____ _____	**PASS / FAIL [PGE EVALUATORS TO COMPLETE]** ☐ PASS ☐ FAIL Initials: _____

M3 | Minimum relevant meter installation experience	
MANDATORY CRITERIA The Offeror, either independently or in combination with its proposed subcontractors, must demonstrate experience performing at least three (3) electric meter installation or meter exchange projects involving residential electric meters within the last ten (10) years, at least one (1) of which must have been completed as of the Proposal Closing Date. Each project must have included field installation activities, work-order documentation, meter inventory management, and customer-facing interactions. The three required projects may be provided by the Offeror and one or more proposed subcontractors in combination; however, each project relied upon to satisfy this criterion must independently satisfy the project requirements stated above. The Proposal must identify the entity that performed each project and the role that entity is proposed to perform under the resulting Contract.	**PROPOSAL PREPARATION INSTRUCTIONS** The Offeror must provide information for at least three (3) projects that satisfy this criterion, at least one (1) of which must have been completed as of the Proposal Closing Date. **For each project, the Offeror must provide:** Utility client name; Project dates; Approximate number and types of meters installed; Scope of services performed by the Offeror; Project completion status; and Client reference name, title, telephone, and email, with the Offeror's confirmation that the reference may be contacted by PGE **The Offeror must also provide:** Company name; Business address; Website; Primary contact information; Number of years in business; Organizational structure; Approximate number of employees; Areas of specialization; Office locations; and Office proposed to support this Project.

M3 | Minimum relevant meter installation experience	
CROSS-REFERENCE TO SPECIFIC PAGE IN PROPOSAL [OFFEROR TO COMPLETE] Page(s): _____ _____	**PASS / FAIL [PGE EVALUATORS TO COMPLETE]** ☐ PASS ☐ FAIL Initials: _____

M4 | Required key personnel	
MANDATORY CRITERIA The Offeror must propose, at a minimum, the following key personnel for the Project: Project Manager Operations Manager Safety Manager Quality Manager	**PROPOSAL PREPARATION INSTRUCTIONS** For each proposed individual, the Offeror must provide: 1. Name and proposed role; 2. Resume; 3. Availability for the Project; and 4. Identification of whether the individual is an employee of the Offeror or a subcontractor. The Proposal will be deemed compliant if all required positions are identified and the required information is provided for each proposed individual.
CROSS-REFERENCE TO SPECIFIC PAGE IN PROPOSAL [OFFEROR TO COMPLETE] Page(s): _____ _____	**PASS / FAIL [PGE EVALUATORS TO COMPLETE]** ☐ PASS ☐ FAIL Initials: _____

M5 | Financial information	
MANDATORY CRITERIA The Offeror must provide the financial information identified in the Proposal Preparation Instructions to support PGE's determination of whether the Offeror is a Responsible Offeror.	**PROPOSAL PREPARATION INSTRUCTIONS** The Offeror must provide audited financial statements for its two (2) most recently completed fiscal years. If the Offeror is a subsidiary and intends to rely on the financial resources of its parent company, the Offeror must also provide the applicable parent-company financial information and identify any proposed parent-company guarantees. Compliance with this Mandatory Evaluation Criterion will be based on submission of the required information. Financial capacity will be evaluated separately as part of PGE's determination of whether the Offeror is a Responsible Offeror.
CROSS-REFERENCE TO SPECIFIC PAGE IN PROPOSAL [OFFEROR TO COMPLETE] Page(s): _____	**PASS / FAIL [PGE EVALUATORS TO COMPLETE]** ☐ PASS ☐ FAIL Initials: _____

M6 | Safety information	
MANDATORY CRITERIA The Offeror must provide the safety performance information and supporting documentation identified in the Proposal Preparation Instructions for the three (3) most recently completed calendar years.	**PROPOSAL PREPARATION INSTRUCTIONS** The Offeror must provide: Experience Modification Rate (EMR); Total Recordable Incident Rate (TRIR); A description of any workplace fatalities; and A description of any material regulatory safety citations. **Supporting documentation must be included.** For purposes of this criterion: EMR means the Offeror's interstate Experience Modification Rate as calculated by NCCI or the applicable state rating bureau; if the Offeror operates in a monopolistic state fund jurisdiction, the Offeror shall provide the equivalent experience factor issued by that fund and identify the issuing authority. TRIR means the Offeror's Total Recordable Incident Rate calculated as (number of OSHA-recordable injuries and illnesses × 200,000) ÷ total hours worked, consistent with the Offeror's OSHA 300A summaries. EMR and TRIR shall be provided for each of the three (3) most recently completed calendar years, with supporting documentation from the issuing authority or the Offeror's OSHA 300A forms. Compliance with this Mandatory Evaluation Criterion will be based on submission of the required safety information and supporting documentation. The substance of the safety information will be evaluated under Point-Rated Criterion PR2.7 and may also be considered in PGE's responsibility determination.
CROSS-REFERENCE TO SPECIFIC PAGE IN PROPOSAL [OFFEROR TO COMPLETE] Page(s): _____ _____	**PASS / FAIL [PGE EVALUATORS TO COMPLETE]** ☐ PASS ☐ FAIL Initials: _____

M7 | Work-management system capability	
MANDATORY CRITERIA The Offeror must demonstrate that its proposed work management system currently supports, or will support prior to deployment, electronic work-order management, meter and asset tracking, photographic documentation, GPS capture, field validation, daily electronic data transfer, and integration with PGE systems.	**PROPOSAL PREPARATION INSTRUCTIONS** The Offeror must provide a description of the proposed work management system and identify whether the system currently supports, or will support prior to deployment, each of the following: Electronic work-order management Meter and asset tracking Photographic documentation GPS capture Field validation Daily electronic data transfer Integration with PGE systems The Proposal will be deemed compliant if the Offeror addresses each required capability and identifies whether the capability is currently available or will be operational prior to deployment.
CROSS-REFERENCE TO SPECIFIC PAGE IN PROPOSAL [OFFEROR TO COMPLETE] Page(s): _____ _____	**PASS / FAIL [PGE EVALUATORS TO COMPLETE]** ☐ PASS ☐ FAIL Initials: _____

M8 | Required certifications and compliance	
MANDATORY CRITERIA The Offeror must certify its ability and willingness to comply with applicable contract requirements, including background checks, drug and alcohol screening requirements, applicable PGE fire-season training requirements, insurance requirements, confidentiality obligations, record retention requirements, and applicable federal award requirements. The Offeror must also certify its ability and willingness to comply with the electrician licensing, IBEW representation, permitting, and Davis-Bacon labor standards applicable to Minor Electrical Repairs, as set forth in the SOW and Contract.	**PROPOSAL PREPARATION INSTRUCTIONS** The Offeror must provide a signed certification confirming its ability and willingness to comply with the requirements identified in M8 and must identify any requested exceptions permitted under this Solicitation. Exceptions to Annex H are governed exclusively by Section 2.3 and may not be submitted in response to this criterion. Compliance with this mandatory criterion will be based on submission of the required certification.
CROSS-REFERENCE TO SPECIFIC PAGE IN PROPOSAL [OFFEROR TO COMPLETE] Page(s): _____ _____	**PASS / FAIL [PGE EVALUATORS TO COMPLETE]** ☐ PASS ☐ FAIL Initials: _____

M9 | Workforce Representation Disclosure	
MANDATORY CRITERIA The Offeror must state whether personnel proposed to perform routine AMI meter exchange services under the resulting Contract will be represented by IBEW Local 125. If the Offeror answers "Yes," the Offeror must also identify whether those personnel will be covered by an applicable collective bargaining agreement or project-specific labor agreement and identify the applicable agreement. This Mandatory Evaluation Criterion applies to personnel proposed to perform routine AMI meter exchange Services and does not apply to personnel performing Minor Electrical Repairs. Minor Electrical Repairs are subject to the separate electrician licensing and IBEW representation requirements set forth in the SOW. Failure to provide the required disclosure will render the Proposal nonresponsive.	**PROPOSAL PREPARATION INSTRUCTIONS** Provide a Yes/No response regarding IBEW Local 125 representation for personnel proposed to perform routine AMI meter exchange Services. If Yes, identify the applicable collective bargaining agreement or project-specific labor agreement. Compliance with this Mandatory Evaluation Criterion will be based on submission of the required disclosure. A "No" response will not, by itself, render the Proposal nonresponsive. The Offeror's readiness and proposed approach to satisfying the applicable IBEW Local 125 representation requirement will be evaluated under Point-Rated Criterion PR5.
CROSS-REFERENCE TO SPECIFIC PAGE IN PROPOSAL [OFFEROR TO COMPLETE] Page(s): _____ _____	**PASS / FAIL [PGE EVALUATORS TO COMPLETE]** ☐ PASS ☐ FAIL Initials: _____

ANNEX D – POINT-RATED EVALUATION CRITERIA

The Evaluation Committee will evaluate the extent to which each Proposal addresses the requested information. Failure to address required content may result in a reduced score for the applicable criterion but will not, by itself, render the Proposal nonresponsive.

Standardized Scoring Method

Evaluators will use the following standardized scoring methodology when evaluating each Point-Rated Criterion.

Rating	Definition of Score	Score
Exceptional	The response to the criterion significantly exceeds the stated requirements and demonstrates an outstanding approach that provides substantial benefit to PGE. The response demonstrates extensive relevant experience, expertise, and understanding of the criterion being evaluated. The response contains numerous strengths and no significant weaknesses or deficiencies.	**5**
Good / Above Average	The response to the criterion exceeds the stated requirements and demonstrates a strong approach. The response contains several strengths that provide benefit to PGE. Any weaknesses are minor and are not expected to affect successful performance of the applicable requirement.	**4**
Acceptable	The response to the criterion meets the stated requirements and demonstrates an adequate approach. The response provides sufficient information to show the Offeror can successfully perform the applicable requirement. Any weaknesses are minor and do not materially diminish the value of the response.	**3**
Adequate with Deficiencies	The response to the criterion only partially meets the stated requirements and contains one or more weaknesses or deficiencies. Concerns exist regarding the Offeror's ability to fully satisfy the applicable requirement without improvement or clarification.	**2**
Poor / Deficient	The response to the criterion fails to adequately meet the stated requirements and contains significant weaknesses and/or deficiencies. The information provided is limited, unclear, or insufficient to demonstrate the Offeror's capability with respect to the criterion being evaluated. Significant improvement would be required for the response to be considered acceptable.	**1**
Unacceptable, Missing, or Incomplete	The response to the criterion fails to meet the stated requirements, omits required information, contains conflicting information, or is otherwise nonresponsive to the criterion. The response provides little or no basis for evaluating the Offeror's capability with respect to the criterion.	**0**

Point-Rated Evaluation Criteria

Each Proposal should address all Point-Rated Evaluation Criteria completely and in the order listed below. The completeness and quality of the response will be considered in assigning the applicable score.

Offerors should provide the number of project examples specified under each applicable Point-Rated Evaluation Criterion. Each project example should include the information specifically requested under the applicable criterion.

PGE will evaluate only the maximum number of project examples identified for each Point-Rated Evaluation Criterion. If more than the maximum number of project examples is submitted, PGE will evaluate only the maximum permitted number, beginning with the first project example presented and proceeding in the order submitted.

Each project example will receive a rating from 0 to 5 using the Standardized Scoring Method, unless otherwise specified in the applicable Point-Rated Evaluation Criterion.

Incomplete project examples, or project examples that fail to provide sufficient information to evaluate compliance with the applicable criterion, may receive a score of zero (0).

For criteria requiring multiple project examples, the average of all evaluated project example ratings will be calculated and rounded to two decimal places. The resulting average rating will then be multiplied by the applicable criterion weight to determine the Assigned Score.

Offerors may use the same project example to address multiple Point-Rated Evaluation Criteria, provided the example clearly demonstrates the experience and qualifications required for each applicable criterion and includes the information requested under each criterion.

#	Point-Rated Evaluation Criteria & Proposal Preparation Instructions	[PGE EVALUATORS TO COMPLETE]		
		Score [0-5]	Weight	Assigned Score [Score x Weight]
PR1	**RELEVANT ORGANIZATIONAL EXPERIENCE:** The Offeror should demonstrate organizational experience successfully performing large-scale electric meter installation or advanced metering infrastructure ("AMI") deployment projects of similar scope, complexity, and operational characteristics to the Project described in the RFP. PGE will evaluate the relevance, scale, complexity, demonstrated success, and recency of the Offeror's experience in providing AMI deployment services. Greater consideration may be given to experience involving 500,000 or more meter endpoints, meter technologies similar to those contemplated by this Solicitation, and utility service territories with geographic characteristics similar to PGE's service area. Evaluation may include experience with: a. Residential electric meter exchange programs; b. High-volume meter deployment programs; c. Customer-facing field operations; d. Meter inventory management and asset tracking; e. Work-order management and field data collection; f. Utility service territories with diverse geographic, urban, suburban, and rural conditions; and g. Coordination with utility operations, meter shops, or AMI system suppliers. PGE may also consider the Offeror's experience performing commercial polyphase, transformer-rated, industrial demand, and network meter installations. Because the commercial and industrial scope is optional, a lack of commercial and industrial meter installation experience will not render a Proposal nonresponsive; however, such experience will be evaluated as part of PR1 and may affect the Offeror's score. **Proposal Preparation Instructions:** The Offeror should provide two (2) primary project examples involving the installation or exchange of residential electric meters. The primary project examples should demonstrate experience relevant to the Services, including: a. The number and type of meters installed or exchanged; b. The duration and schedule of the project;		**20**	

	c. The geographic area and operating environment; d. Field installation and deployment activities; e. Work-order documentation and work-management system integration; f. Meter inventory management and material controls; g. Customer communications and customer-facing interactions; h. Quality-control and quality-assurance processes; i. Safety performance; j. Coordination with the utility and other contractors; k. Management of schedule, staffing, and performance challenges; and l. The results achieved, including whether the project was completed on schedule and within budget. In addition, the Offeror should provide two (2) supplemental project examples demonstrating experience performing commercial and industrial electric meter installations or exchanges. The supplemental project examples should address, as applicable, the same information requested for the primary project examples and should explain the relevance of the experience to the Services. For each project example, the Offeror should provide: a. The customer or utility name; b. The project name and location; c. The project start and completion dates, or current status if the project is ongoing; d. A description of the Offeror's scope of work and responsibilities; e. The number and type of meters installed or exchanged; f. The Offeror's role, including whether the Offeror served as the prime contractor, joint-venture member, or subcontractor; g. The portions of the work performed by the Offeror and any subcontractors; h. The names and roles of proposed key personnel who performed work on the project, if applicable; i. A description of any significant performance challenges and how they were addressed; j. The results achieved; and k. A customer reference, including the reference's name, title, telephone number, and email address. Project examples should reflect work performed within the last ten (10) years. More recent experience may receive greater consideration when determining the relevance of the Offeror's experience. PGE will evaluate two (2) primary project examples and two (2) supplemental project examples. Each project example will receive a separate rating from zero (0) to five (5) using the Standardized Scoring Method. The four (4) project-example ratings will be averaged. The resulting average rating will be multiplied by the PR1 criterion weight of twenty (20) to determine the Assigned Score for PR1. If the Offeror does not provide sufficient information for any of the four			

	(4) project examples, the affected project example may receive a rating of zero (0) in accordance with the Standardized Scoring Method.			

PR2	**DEPLOYMENT APPROACH, METHODOLOGY, AND EXECUTION PLAN:** The Offeror's Proposal should demonstrate a clear, practical, and effective approach for performing the Services described in this Solicitation. PGE will evaluate the completeness, feasibility, and effectiveness of the proposed approach, including: a. Mobilization and startup activities; b. Deployment sequencing and production strategy; c. Crew structure and staffing methodology; d. Work-management and dispatching approach; e. Customer access and interaction procedures; f. Quality assurance and quality control processes; g. Risk identification and mitigation strategies; h. Coordination with PGE, the AMI system supplier, and the PGE meter shop; i. Management of schedule, production rates, and overall project performance; and j. Workforce training, qualification, and deployment-readiness approach. **Proposal Preparation Instructions:** The Offeror should provide a detailed deployment methodology and execution plan that addresses the evaluation factors above, including: • Mobilization and startup activities, including the timeline from Contract award through commencement of installation activities; • Deployment sequencing, production methodology, and deployment ramp-up strategy; • Crew structure, staffing methodology, and daily production approach; • Work-management and dispatching procedures; • Customer access, interaction, and communication procedures; • Quality assurance and quality control processes; • Risk identification and mitigation strategies, including strategies for addressing operational, geographic, customer-access, weather-related, and other deployment challenges within PGE's service territory; • Coordination procedures with PGE, the PGE meter shop, and the AMI system supplier; • Project schedule, key milestones, production assumptions, production rates, and approach to managing overall project performance; • Training and qualification approach, including initial training, field qualification, refresher training, retraining, and readiness of personnel for production deployment; and • Safety program information addressing subcriterion PR2.7. The Offeror should cross-reference the safety performance information under Mandatory Criterion M6 rather than resubmitting that information. The PR2 criterion has a total weight of forty-five (45), allocated among subcriteria PR2.1 through PR2.7 below.		**45**	

	Each evaluator will assign a final individual score from zero (0) to five (5) to each subcriterion PR2.1 through PR2.7 below. The evaluators' final individual scores for each subcriterion will be averaged, and the resulting average will be multiplied by the subcriterion weight to determine the Assigned Score for that subcriterion.			
PR2.1	Mobilization, schedule, and ramp-up – evaluation factors (a) and (i), including the mobilization timeline, deployment ramp-up, project schedule, key milestones, production assumptions, and management of overall project performance.		**8**	
PR2.2	Production approach – evaluation factors (b), (c), and (d), including deployment sequencing, production methodology, crew structure, staffing methodology, daily production approach, and work-management and dispatching procedures.		**8**	
PR2.3	Customer access and interaction – evaluation factor (e), including customer access, interaction, and communication procedures.		**6**	
PR2.4	Quality assurance and quality control – evaluation factor (f).		**6**	
PR2.5	Risk mitigation and coordination – evaluation factors (g) and (h), including operational, geographic, customer-access, and weather-related risk strategies and coordination with PGE, the PGE meter shop, and the AMI system supplier.		**4**	
PR2.6	Training and deployment readiness – evaluation factor (j), including initial training, field qualification, refresher training, retraining, and readiness of personnel for production deployment.		**4**	
PR2.7	Safety program and performance – the Offeror's safety program and how it addresses the hazards identified in the SOW (including arc flash, lockout/tagout, energized meter sockets, unsafe customer-site conditions, animal hazards, and fire season); the role and authority of the Safety Manager; incident and near-miss reporting, investigation, and corrective action; and the Offeror's safety performance for the three (3) most recently completed calendar years (EMR, TRIR, fatalities, and material citations) as submitted under Mandatory Criterion M6, including levels, trends, and corrective responses. The Offeror may cross-reference its M6 submission.		**9**	

PR3	**KEY PERSONNEL AND STAFFING PLAN:** The Offeror's Proposal should demonstrate that the proposed project team possesses the qualifications, experience, and capacity necessary to successfully perform the Services. PGE will evaluate: a. Qualifications and relevant experience of proposed key personnel; b. Experience of proposed key personnel managing or performing key roles on projects of similar scope and complexity; c. Organizational structure and reporting relationships; d. Adequacy of proposed staffing levels and resource availability; e. Workforce recruitment, training, and retention approach; and f. Use and management of subcontractors. **Proposal Preparation Instructions:** The Offeror should provide: 1. An organizational chart identifying proposed project personnel, including subcontractor personnel. 2. A staffing plan identifying key personnel by name and role, including the Project Manager, Operations Manager, Quality Manager, Safety Manager, and other leadership positions, and describing: • Project management structure; • Deployment crew composition; • Recruitment, training, and retention strategies; • Staffing ramp-up and scaling approach; and • The role of subcontractors, if any. 3. Resumes for proposed key personnel demonstrating their qualifications and relevant experience, including experience managing or performing key roles on projects of similar scope and complexity. 4. If subcontractors will be used, identification of proposed subcontractors and a description of their scope of work. **For the optional commercial and industrial meter Services, the Offeror should identify:** • Personnel or labor classifications proposed to perform such Services; • Applicable licenses, certifications, training, and qualifications; • Relevant installation experience;		**15**	

	• Whether the personnel are employees or subcontractors; • Personnel location; and • The approach for maintaining qualified staffing if PGE exercises the optional scope. **For optional Minor Electrical Repairs, the Offeror should identify:** • The Licensed Electricians or electrical subcontractor proposed to perform such repairs; • Oregon electrical licensing and the applicable electrical contractor license; • IBEW signatory status or the proposed approach to satisfying the IBEW representation requirement in the SOW; • Experience with meter-socket and service-entrance repairs; • The approach to permits, inspections, and Davis-Bacon certified payroll; and • The approach for maintaining electrician availability so that repairs do not delay the deployment schedule. Each evaluator will assign a final individual holistic rating from zero (0) to five (5) based on the Offeror's response to this criterion. The evaluators' final individual ratings will be averaged.			

PR4	**WORK MANAGEMENT SYSTEM, QUALITY, AND INNOVATION:** The Offeror's Proposal should demonstrate the capabilities of its work management system, quality management processes, and any innovations that would improve project execution, customer experience, or operational efficiency. PGE will evaluate: a. Work-order management functionality; b. Warehouse operations, inventory control, and asset tracking capabilities, including receiving of drop-shipped PGE-furnished meters, chain-of-custody controls, and separate tracking of inventory by funding source; c. Data collection, GPS, photo documentation, and field-validation capabilities; d. Data quality controls and validation processes; e. Reporting and dashboard capabilities; f. System integration experience and capabilities; g. Quality assurance and audit methodology; h. Customer service capabilities; i. Proposed innovations or value-added approaches; and j. Capability to perform optional meter acceptance testing, including test equipment, calibration practices, and testing experience. **Proposal Preparation Instructions:** The Offeror should describe: • Its work management system, including work-order management, dispatching, status tracking, and field-workflow capabilities; • Its warehouse and inventory management approach, including: proposed warehouse location(s) relative to PGE's service territory; receiving, reconciliation, and exception procedures for drop-shipped PGE-furnished meters, using the manufacturer's electronic shipment files; secure storage and chain-of-custody controls from receipt through installation and return of removed meters; serial-number-level tracking; and the approach to separately identifying and tracking inventory and related records by funding source (e.g., federal grant-funded versus PGE-funded), consistent with the separate-tracking requirements of the SOW; • Field devices and technologies used to support deployment activities, including GPS, photo documentation, and field-validation capabilities; • Data capture, validation, synchronization, quality control, and reporting processes, including dashboard capabilities; • Methods for transmitting and integrating field information with the Offeror's systems and PGE systems; • Its quality assurance, quality control, and audit methodology; • Customer issue tracking, management, and resolution capabilities; • Any proposed innovations or value-added approaches, including anticipated benefits where quantifiable.		**15**	

	For optional meter acceptance testing, the Offeror should describe its meter-testing capability, including test equipment and calibration practices meeting the requirements of Annex I, Section 6, testing facility or mobile testing approach, experience performing acceptance or compliance testing of electric meters, and the approach to documenting and reporting test results. Each evaluator will assign a final individual holistic rating from zero (0) to five (5) based on the Offeror's response to this criterion. The evaluators' final individual ratings will be averaged.			

PR5	**Workforce Representation** PGE will evaluate the Offeror's readiness and proposed approach to satisfying the IBEW Local 125 representation requirement applicable to personnel performing routine AMI meter exchange services prior to commencement of applicable field work. **Proposal Preparation Instructions:** The Offeror should state whether the personnel proposed to perform routine AMI meter exchange services are currently represented by IBEW Local 125 under an applicable collective bargaining agreement or project-specific labor agreement. • If yes, the Offeror should identify the applicable collective bargaining agreement or project-specific labor agreement. • If no, the Offeror should describe its proposed approach and anticipated timeline for satisfying the IBEW Local 125 representation requirement prior to commencement of applicable field work. **Criterion-Specific Scoring:** **5 points:** The Offeror demonstrates that the proposed workforce will satisfy the applicable IBEW Local 125 representation requirement prior to commencement of applicable field work, either through existing representation or through a clear and credible approach and timeline for satisfying the requirement. **3 points:** The Offeror demonstrates a proposed approach to satisfying the IBEW Local 125 representation requirement prior to commencement of applicable field work, but the approach or timeline presents material uncertainty regarding readiness by the required date. **0 points:** The Offeror does not demonstrate a credible approach and timeline for satisfying the IBEW Local 125 representation requirement prior to commencement of applicable field work. Each evaluator will assign a final individual rating using the Criterion-Specific Scoring above. Only ratings of 5, 3, or 0 may be assigned. The evaluators' final individual ratings will be averaged, and the resulting average rating will be multiplied by the applicable criterion weight to determine the Assigned Score.		**5**	
Total Weight			**100**	
Maximum Available Assigned Technical Points				**500**

ANNEX E – CONTRACTOR REPRESENTATION AND CERTIFICATION

The Offeror must complete, sign, and return this form with its Proposal.

Offeror Name: _____

RFP Title: _____

RFP Number: _____

In response to the above-referenced RFP, the undersigned certifies that the Offeror proposes to perform all operations, duties, and obligations required to complete the services covered in this RFP.

The undersigned certifies that the Offeror:

1. Has read and fully understands all terms and conditions of this Solicitation and PGE's contract template, including the Federal Grant Requirements for Contractors;

2. Has complied, or will comply, with all applicable laws and regulations;

3. Has not made, and will not make, any false certifications to PGE;

4. Is legally qualified to enter into a contract with PGE;

5. Agrees to provide PGE, upon request, with documentation demonstrating that the Offeror has, or can obtain, the financial, material, equipment, facility, and personnel resources necessary to successfully perform the Contract;

6. Has not discriminated, and will not discriminate, against any minority-owned, women-owned, or emerging small business enterprise in obtaining any required subcontract;

7. Discloses whether any personnel proposed to perform Services under the Contract are foreign nationals and agrees that any such personnel will not perform Services or receive access to restricted information, systems, facilities, or technology unless and until all applicable participation and access requirements have been satisfied and PGE has provided any required approval;

8. Agrees to ensure that all Services requiring access to PGE systems, non-public Critical Energy Infrastructure Information (CEII), Protected Critical Infrastructure Information (PCII), confidential utility information, grant-related information, or other restricted Project information are performed within the United States by personnel authorized to access such information. Any performance of Services outside the United States must receive PGE's prior written approval and must comply with all applicable federal, contractual, cybersecurity, export control, and Project security requirements;

9. Agrees that this Proposal constitutes a firm offer to PGE that cannot be withdrawn for one hundred eighty (180) calendar days from the Proposal Closing Date;

10. Has carefully reviewed all representations and information contained in this Proposal, including any matters that may affect the proposed services or associated costs;

11. Acknowledges that PGE will not be responsible for any errors or omissions in this Proposal, or for any costs or expenses incurred in preparing this Proposal;

12. Is authorized to bind the Offeror to this Proposal and to any resulting contractual agreement;

13. Agrees to protect all non-public, confidential, or proprietary information provided by PGE in connection with this Solicitation and not to use, disclose, or reproduce such information except as necessary to prepare its Proposal or as otherwise authorized in writing by PGE;

14. Agrees not to use the Portland General Electric name or the name of any of its subsidiaries or affiliated companies, in any advertising, publicity, endorsement, or other disclosure. Unless otherwise provided in a nondisclosure agreement executed between PGE and the Offeror, no confidentiality obligation shall be imposed upon PGE by this Proposal or any materials submitted by the Offeror;

15. Acknowledges that the Offeror and its employees, approved subcontractors, or agents may, in the course of performing responsibilities under any resulting Contract, be exposed to or acquire information that is confidential to the federal awarding entity, PGE, or its clients or customers. The Offeror agrees to comply with all reasonable requests of the federal awarding entity or PGE to protect such information, including, without limitation, executing nondisclosure agreements in a form acceptable to PGE and permitting criminal background checks for employees, subcontractors, and agents assigned to perform the Services;

16. Understands and agrees that neither the federal awarding entity nor PGE shall be liable for any claims or subject to any defenses asserted by the Offeror arising from or related to the Offeror's failure to fully understand all requirements of this Solicitation;

17. Represents and warrants that it is not listed on the government-wide exclusions maintained in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180, implementing Executive Orders 12549 and 12689 regarding Debarment and Suspension;

18. Represents and warrants that: (a) it has no unpaid Federal tax liabilities for which all judicial and administrative remedies have been exhausted or lapsed; or (b) if unpaid Federal tax liabilities exist, they are being paid in a timely manner pursuant to an agreement with the relevant tax authority;

19. Represents and warrants that it has not been convicted of a felony criminal violation under any Federal law within the preceding twenty-four (24) months;

20. Acknowledges that all required data and supporting information submitted with this Proposal are incorporated herein by reference and made part of this Proposal;

21. Acknowledges that PGE may incorporate this Solicitation and any information submitted by the Offeror into a resulting contract between the parties;

22. Has disclosed all actual, potential, or apparent conflicts of interest relating to the award or performance of the Contract and agrees to comply with any mitigation measures required or approved by PGE; and

23. Acknowledges receipt, understanding, and full consideration of the following addenda to this RFP. List all addenda by number and date as they appear on the RFP addenda. If no addenda have been received, enter "None".

    Addenda Nos._____.
    The Offeror is responsible for regularly checking the PGE website at portlandgeneral.com/pgebuys for any issued RFP addenda.

AUTHORIZED REPRESENTATIVE SIGNATURE

An individual authorized to make legally binding commitments on behalf of the Offeror must sign below. The signature constitutes a representation that reasonable and prudent inquiry has been made to verify the accuracy of all statements made herein. Statements that a person knows or has reason to believe are false, fictitious, or fraudulent may result in criminal or civil penalties, as prescribed in 18 USC 1001 and 31 USC 3802(a)(2). The Offeror must notify PGE of any changes to these representations or certifications during any resulting contract period.

Name of Primary Representative: _____
Title of Representative: _____

Address, City, State, Zip Code: _____
Phone Number: _____
Email Address: _____
Authorized Signature: _____
Date: _____

ANNEX F - NON-COLLUSION CERTIFICATION

I _____(Title), of _____(Firm Name), certify that I am authorized to make this affidavit on behalf of my firm and its owners, directors, and officers. I am authorized to certify the information contained in this Proposal and am responsible for the pricing and other information submitted on behalf of the Offeror.

I hereby certify that:

1. The prices and amounts in this Proposal were determined independently, without consultation, communication, or agreement with any other contractor, Offeror, or potential Offeror, except as expressly disclosed.

2. Neither the prices nor the amounts contained in this Proposal, whether exact or approximate, have been disclosed to any other firm or person who is, or may be, an Offeror, and they will not be disclosed prior to the Proposal Closing Date.

3. No attempt has been made, or will be made, to induce any firm or person to refrain from submitting a Proposal, to submit a Proposal higher than this Proposal, or to submit any intentionally high, non-competitive, or complementary Proposal.

4. This Proposal is submitted in good faith and is not the result of any agreement, discussion, or inducement from any firm or person to submit a complementary or other non-competitive Proposal.

5. _____(Firm Name), its affiliates, subsidiaries, officers, directors, and employees are not currently under investigation by any governmental agency for, and have not, within the last four (4) years, been convicted of or found liable for, any act prohibited by state or federal law in any jurisdiction involving conspiracy or collusion with respect to proposing on any contract.

I acknowledge, on behalf of myself and my firm, that the representations made above are material and important and will be relied upon by PGE in awarding the contract for which this Proposal is submitted. I understand that any misstatement in this affidavit constitutes, and will be treated as, fraudulent concealment from PGE of the true facts relating to the submission of this Proposal.

AUTHORIZED REPRESENTATIVE SIGNATURE

An individual authorized to make legally binding commitments on behalf of the Offeror must sign below. The signature constitutes a representation that reasonable and prudent inquiry has been made to verify the accuracy of all statements made herein. Statements that a person knows or has reason to believe are false, fictitious, or fraudulent may result in criminal or civil penalties, as prescribed in 18 USC 1001 and 31 USC 3802(a)(2). The Offeror must notify PGE of any changes to these representations or certifications during any resulting contract period.

Name of Primary Representative: _____
Title of Representative: _____
Address, City, State, Zip Code: _____
Phone Number: _____
Email Address: _____
Authorized Signature: _____
Date: _____

ANNEX G - BYRD ANTI-LOBBYING AMENDMENT CERTIFICATION

Pursuant to the Byrd Anti-Lobbying Amendment, 31 U.S.C. § 1352 (as amended), Offerors submitting Proposals for contracts, subcontracts, grants, or cooperative agreements exceeding $100,000 involving federal funding must complete and submit this certification.

The undersigned certifies, to the best of their knowledge and belief, that:

1. **No federal appropriated funds** have been paid, or will be paid, by or on behalf of the undersigned to any person for the purpose of influencing or attempting to influence:
    - An officer or employee of a federal agency;
    - A Member of Congress;
    - An officer or employee of Congress; or
    - An employee of a Member of Congress,

    in connection with the awarding of any federal contract, the making of any federal grant or loan, the entering into of any cooperative agreement, or the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

2. If any non-federal funds have been paid, or will be paid to, any person for the purpose of influencing or attempting to influence any of the individuals listed above in connection with this contract, grant, loan, or cooperative agreement, the undersigned shall submit Standard Form LLL (Disclosure of Lobbying Activities) and any other information required by applicable federal regulations to PGE. PGE reserves the right to request additional information if the disclosure provided is insufficient to satisfy federal reporting obligations.

3. The undersigned shall ensure that the language of this certification is included in the award documents for all subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements at all tiers, and that all contractors and subrecipients certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed at the time this transaction was made or entered into. Submission of a false certification may result in penalties as prescribed under applicable federal law.

AUTHORIZED REPRESENTATIVE SIGNATURE

An individual authorized to make legally binding commitments on behalf of the Offeror must sign below. The signature constitutes a representation that reasonable and prudent inquiry has been made to verify the accuracy of all statements made herein. Statements that a person knows or has reason to believe are false, fictitious, or fraudulent may result in criminal or civil penalties, as prescribed in 18 USC 1001 and 31 USC 3802(a)(2). The Offeror must notify PGE of any changes to these representations or certifications during any resulting contract period.

Name of Primary Representative: _____
Title of Representative: _____
Address, City, State, Zip Code: _____
Phone Number: _____
Email Address: _____
Authorized Signature: _____
Date: _____

ANNEX H – MASTER PURCHASE AGREEMENT FOR SERVICES TEMPLATE

The Master Purchase Agreement Template (Annex H) will be provided to prospective Offerors as a separate attachment.

ANNEX I – ACCEPTANCE AND EXCEPTION LIST

The Acceptance and Exception List (Annex I) will be provided to prospective Offerors as a separate attachment.