



REQUEST FOR PROPOSAL

PGE01-GID05-SH-006/A

Alternatives Analysis for the Warm Springs Power Pathway Project in support of the U.S.
Department of Energy ("DOE") Grant:

Bipartisan Infrastructure Law ("BIL") Confederated Tribes of the Warm Springs ("CTWS") and Portland General
Electric ("PGE") Regional 500 kV Transmission Innovative Project

RESOLICITATION NOTICE: This RFP replaces canceled RFP No. PGE01-GID05-SH-006. No Contract was awarded under the prior solicitation. Offerors must submit a new Proposal in response to this RFP.

RFP Issue Date:	September 4, 2026
Due Date for Offeror Questions & Requests for Clarification:	September 21, 2026
Proposals in Response to the RFP Due By:	October 6, 2026, at 5:00 p.m. PDT Late Proposals will not be accepted or considered.
Interviews (if requested):	November 2026
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 attachments, 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 attachments 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

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

PGE requires the Contractor to conduct a comprehensive study evaluating viable alternatives for the Project described in the SOW. Additional Project information is provided in Annex A (Statement of Work).

b. Project Background

On October 18, 2023, the Confederated Tribes of the Warm Springs ("CTWS") received a \$250 million grant from the United States Department of Energy ("DOE") under the Grid Resilience and Innovation Partnerships ("GRIP") Program to strengthen electric grid resilience and reliability. This grant was



formalized through Assistance Agreement No. DE-GD0000934 between Warm Springs Power and Water Enterprises ("WSPWE") and the DOE, effective August 13, 2024.

PGE is a subrecipient under the grant and entered into a Subrecipient Agreement with WSPWE effective December 1, 2024.

This transmission upgrade is intended to increase transmission capacity and facilitate the delivery of significant amounts of energy from Central Oregon and surrounding regions, including Tribal lands, to PGE's load centers in the Willamette Valley.

c. Federal Funding Requirements

This Project is funded in whole or in part through a DOE grant awarded under the BIL for the CTWS and PGE Regional 500 kV Transmission Innovative Project.

Accordingly, this Solicitation and any resulting Contract are 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 all terms and conditions contained in the DOE award.

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

5. Prior Solicitation and Resolicitation

PGE previously solicited proposals for these Services under RFP No. PGE01-GID05-SH-006, issued on April 17, 2026, with proposals due on May 22, 2026. PGE has canceled that solicitation without making an award.

This RFP, No. PGE01-GID05-SH-006/A, is a new solicitation that replaces the canceled solicitation. Offerors must prepare and submit new Proposals in accordance with the requirements, instructions, evaluation criteria, forms, and deadlines contained in this RFP. Proposals submitted in response to the prior solicitation will not be considered under this RFP.

6. Contract Duration

The Contractor is expected to complete all tasks and submit all initial deliverables within six (6) months after the Effective Date unless otherwise stated in the SOW. The remaining Contract term is intended to accommodate review, correction of deficiencies, acceptance, and administrative closeout.

7. 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 2.29 to expire and will resolve any timely submitted protest before executing the Contract, unless otherwise permitted by applicable law or Project requirements.

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:



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- 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. **"CTWS" and "the Tribes"** refer to the Confederated Tribes of Warm Springs.
 - i. **"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.
 - j. **"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.
 - 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 and in Section 1.10. The SPOC will administer communications relating to this Solicitation on behalf of PGE.
 - o. **"Technical Score," "Price Score," "Interview Score," "Pre-Interview Ranking," 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 September 21, 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. 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.

4. 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.

5. 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.

6. 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 2.25.

7. 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 non-responsive;
- 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;



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- 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.

8. 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.

9. 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 RFP due 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.

10. 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. The Offeror agrees that PGE will not be in violation of any confidentiality agreement if such information is disclosed to the DOE.

11. 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.

12. Competitive Procurement

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



13. 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.

14. 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.

15. Conflict of Interest

The Offeror shall disclose any actual, potential, or perceived conflict of interest that may impact its ability to perform the Services in an objective and impartial manner.

Examples include, but are not limited to:

- a. Financial interests that may benefit from the award;
- 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 or contractual relationships that may impair independent judgment;
- d. Relationships with PGE, DOE, CTWS, or Project stakeholders having decision-making authority, ownership interests, regulatory authority, or financial interests in the Project that could create an unfair competitive advantage; and
- e. Any actual, apparent, or potential organizational conflict of interest, or any other circumstance that could create an unfair competitive advantage or impair the Offeror's objectivity in performing the Services.

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 determine that a conflict of interest exists and may require mitigation measures, disqualify an Offeror, or take any other action deemed appropriate.

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

16. 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.

17. 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.



18. 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.

19. 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.

20. Contract Negotiation

PGE will initiate Contract negotiations with the highest-ranked responsive and responsible Offeror. PGE may negotiate general Contract terms and conditions, services, pricing, implementation schedules, and other terms it deems appropriate. If negotiations do not result in an executed Contract, PGE reserves the right to terminate negotiations and proceed with the next highest-ranked responsive and responsible Offeror. This process may continue until a Contract is successfully executed.

21. 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.

22. 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.

23. 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.

24. Responsiveness

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

25. 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 RFP 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 their Proposals.

26. 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.

27. 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.



28. 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.

29. 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. All protests must cite the specific law, rule, regulation, or procedure upon which the protest is based. Disagreement with the judgment 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 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) One or more higher-ranked Proposals are non-responsive; or
 - b) PGE failed to evaluate Proposals in accordance with the criteria or processes described in the Solicitation; or
 - c) PGE abused its discretion in rejecting the Offeror's Proposal as non-responsive.

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. PDT on the seventh (7th) business day** following the issuance of the Intent to Award or disqualification.

Protests filed after this deadline, or that fail to cite the specific law, rule, regulation, or procedure upon which the protest is based, will be dismissed without further consideration. Issues that could have been raised during the Solicitation period are not grounds for protest.

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

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 non-responsive.

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

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

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-GID05-SH-006/A - Alternatives Analysis for the Warm Springs Power Pathway Project"

Proposals are due no later than 5:00 p.m. PDT on October 6, 2026.

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

Any Proposal received after 5:00 p.m. PDT on the Proposal Closing Date, or submitted in a manner not specified in this RFP, will be considered non-responsive 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.

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 technical requirements in accordance with the Proposal Preparation Instructions in Annexes C and D. Substantiation must do more than restate a requirement or simply assert compliance. The Proposal must clearly explain how the Offeror will satisfy each requirement and perform the required work. 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 non-responsive, 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.

Cross-References: Offerors may reference supporting documentation submitted with their Proposals. References must be noted in the “Cross Reference” column of Annexes C and D, and must include the document title and the relevant page and paragraph numbers. Where a reference is not sufficiently precise, the SPOC may request that the Offeror identify the specific location in the referenced document.

Joint Venture: Unless otherwise specified, at least one member of a joint venture must independently satisfy each mandatory requirement. Joint venture members may not pool their individual capabilities to collectively satisfy a single mandatory requirement. Where substantiation of a mandatory requirement is required, the Offeror must identify which joint venture member satisfies that requirement. Offerors with questions about how joint venture Proposals will be evaluated should raise them through the inquiry process as early as possible during the Solicitation period.

Example: A joint venture consisting of members X, Y, and Z may satisfy two separate requirements – such as: (a) three years of experience providing maintenance services, and (b) two years of experience integrating hardware with complex networks – by having different members satisfy each respective requirement. However, if a single requirement calls for three years of maintenance experience, the joint venture cannot combine one year of experience from each of members X, Y, and Z to meet that requirement. Such a response would be declared non-responsive.

4. Financial Proposal

Pricing: Offerors must submit their Financial Proposal in accordance with Annex B.

Blank Prices: Offerors must complete every required pricing field. 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 non-responsive. PGE may seek 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.



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
September 4, 2026	RFP published on the PGE public-facing website
September 21, 2026	Deadline for Offeror questions and requests for clarification
September 28, 2026	PGE responses to Offerors' questions and clarification requests issued
October 6, 2026	Proposals due by 5:00 p.m. PDT
October 27, 2026	Proposals evaluated; highest-ranked Offeror(s) selected for interviews
November 20, 2026	Evaluated interviews, which may include presentations, demonstrations, or question-and-answer sessions, completed.
December 1, 2026	Intent to Award issued to all Offerors
January 20, 2027	Contract negotiations completed
February 16, 2027	Contract approval process completed
February 23, 2027	Contract finalized and awarded

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 non-responsive 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.

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

Clarifications and any extensions of the applicable response deadline will be governed by Section 3.5.

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 non-responsive 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 non-responsive, unless the Solicitation expressly states that failure to comply with a particular requirement will result in non-responsiveness.

3. Financial Evaluation

The financial evaluation will be conducted in accordance with Annex B – Basis of Payment.

If PGE determines that a pricing entry is incomplete, contains an apparent error, or is otherwise inconsistent with the pricing instructions set forth in Annex B, PGE may request clarification in accordance with this Solicitation. PGE reserves the right to evaluate pricing based on the information submitted and the pricing requirements and calculation methodology specified in Annex B.

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 non-responsive 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:

$$\text{Technical Score} = (\text{Average Raw Technical Score Received} \div \text{Maximum Available Technical Points}) \times 50$$

IV. Pricing Score Calculation:

The price score for each responsive Proposal will be calculated using the Offeror's total evaluated price as follows:

$$\text{Price Score} = (\text{Lowest Total Evaluated Price} \div \text{Offeror's Total Evaluated Price}) \times 30$$

V. Pre-Interview Ranking:

The Technical Score and Price Score will be combined to establish a Pre-Interview Ranking.

The Pre-Interview Ranking will be calculated as follows:

$$\text{Pre-Interview Ranking} = \text{Technical Score} + \text{Price Score}$$

Selection for an interview, if conducted, 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 Ranking, 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 three (3). 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.

PGE will develop interview questions, scenarios, demonstrations, presentations, and other evaluation materials to further assess these factors. All interviewed Offerors will be evaluated using a consistent interview process and scoring methodology.

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.

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.

Interviews may be conducted in person, virtually, or through a combination of both methods. The maximum available Interview Score is 20 points.

Each interviewed Offeror's Interview Score will be calculated using the following formula:

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

The average of all evaluator scores assigned to the Offeror shall be used.

The resulting value will be the Offeror's final Interview Score for evaluation purposes.

VII. Final Combined Score:

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

- **Technical Score:** 50
- **Price Score:** 30
- **Interview Score:** 20
- **Total Available Points:** 100

VIII. Final Combined Score Calculation

Formula = Technical Score + Price Score + Interview Score

The Contract may be awarded to the responsive and responsible Offeror whose Proposal is determined to provide the best value to PGE based on the evaluation criteria and scoring methodology set forth in this Solicitation. If interviews are conducted, the responsive and responsible Offeror achieving the highest Final Combined Score will be considered to represent the best value.

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 Technical Score + 500) × 50]	(400 + 500) × 50 = 40.00	(300 + 500) × 50 = 30.00	(200 + 500) × 50 = 20.00
Total Price	\$90,000	\$45,000	\$80,000
Price Score [(Lowest Price + Offeror's Price) × 30]	(\$45,000 + \$90,000) × 30 = 15.00	(\$45,000 + \$45,000) × 30 = 30.00	(\$45,000 + \$80,000) × 30 = 16.88
Combined Technical Score and Price Score	40.00 + 15.00 = 55.00	30.00 + 30.00 = 60.00	20.00 + 16.875 = 36.88
Selected for Interview	Yes	Yes	No
Interview Score [(Average evaluator interview score + Maximum available 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
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 Ranking (60.00). Following interviews, Bidder A achieved the highest Final Combined Score (75.00) and was therefore ranked first and selected for award.

Note 3: For purposes of this example, the Maximum Available Interview Points is 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 weight 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.

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.



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

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.

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

Mandatory Criteria				
A	B	C	D	E
NO.	MANDATORY CRITERIA	PROPOSAL PREPARATION INSTRUCTIONS	CROSS-REFERENCE TO SPECIFIC PAGE IN PROPOSAL [OFFEROR TO COMPLETE]	PASS / FAIL [PGE EVALUATORS TO COMPLETE]
M1	The Offeror must be legally eligible to contract with PGE and must obtain any registration or authorization required to conduct business in Oregon before execution of the Contract.	The Offeror must identify its current Oregon registration status and, if not currently registered, certify that it will obtain all required authorization before Contract execution.		
M2	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.	The Offeror must provide its UEI number and evidence of an active SAM registration.		
M3	The Offeror must demonstrate at least three (3) projects completed within the past ten (10) years involving electric utility system planning, transmission planning, Bulk Electric System ("BES") planning, long-range transmission studies, or a combination thereof.	The Offeror must provide information for at least three (3) completed projects that satisfy this criterion. For each project, the Offeror must provide: • Project name and client; • Project start and completion dates; • A brief description of the services performed; • A description of the project's relevance to electric utility system planning, transmission planning, BES planning, and/or long-range transmission studies; and • The Offeror's role and responsibility for the work. The Offeror must also provide its company name, address, website URL, primary contact information, services and specializations, office locations, and the office proposed to support the Project.		



Mandatory Criteria				
A	B	C	D	E
NO.	MANDATORY CRITERIA	PROPOSAL PREPARATION INSTRUCTIONS	CROSS-REFERENCE TO SPECIFIC PAGE IN PROPOSAL [OFFEROR TO COMPLETE]	PASS / FAIL [PGE EVALUATORS TO COMPLETE]
M4	The Offeror must provide a written summary addressing each of the following: a. The Offeror's qualifications, certifications, awards, and industry recognition, including those of any proposed subcontractors. b. Whether the Offeror has ever defaulted on a Contract. If yes, provide details, including the circumstances and location. c. Whether the Offeror is involved in any material litigation, claims, or proceedings that could reasonably affect the Offeror's ability to perform the Contract. Disclosure of litigation will not, by itself, result in disqualification. PGE will evaluate the information solely for purposes of determining responsibility and ability to successfully perform the Contract. d. Whether the Offeror anticipates any actual or potential conflicts of interest related to this Project. If yes, describe the nature of the conflict and proposed mitigation measures. e. A summary of the Offeror's current financial condition, including any factors that may affect its ability to successfully perform the Contract.	The Offeror must provide a written summary of no more than two (2) pages addressing items (a) through (e).		



ANNEX D - POINT-RATED EVALUATION CRITERIA

Each Proposal should address all Point-Rated Evaluation Criteria completely and in the order presented below. 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 non-responsive.

Standardized Scoring Method

The Evaluation Committee 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. While the response may be acceptable, 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 non-responsive 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.

Project Example Requirements

Unless otherwise specified, all project examples submitted in response to PR1 and PR2 must comply with the Project Example Requirements set forth below.

Unless otherwise specified, PGE will evaluate only the maximum number of project examples identified for each Point-Rated 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.

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.

Each project example submitted must include the following information:

- i. Project name, description, location, and an explanation of its relevance to the Project described in the SOW;
- ii. Purpose of the project;
- iii. Project start and completion dates;
- iv. The Offeror's specific role in the project;
- v. Specific tasks performed;
- vi. Specific deliverables submitted;
- vii. Description of project challenges and successes;
- viii. Key personnel involved and their roles and responsibilities;
- ix. Original and final Contract values;
- x. Whether the project was completed under a compressed schedule, including a description of how the team adapted to meet schedule requirements; and
- xi. Client name, type of organization, reference email address, and telephone number.

POINT-RATED EVALUATION CRITERIA				
		[PGE EVALUATORS TO COMPLETE]		
		Score [0-5]	Weight	Assigned Score [Score x Weight]
#	Point-Rated Evaluation Criteria & Proposal Preparation Instructions			
PR1	TECHNICAL EXPERIENCE: The Offeror's Proposal should demonstrate that its proposed Key Personnel, considered collectively, possess direct experience performing work comparable in scope, complexity, and technical content to the Services described in the SOW, including evaluating and assessing viable alternatives for		20	



POINT-RATED EVALUATION CRITERIA				
		[PGE EVALUATORS TO COMPLETE]		
		Score [0-5]	Weight	Assigned Score [Score x Weight]
#	Point-Rated Evaluation Criteria & Proposal Preparation Instructions			
	230-kV and 500-kV transmission line projects. PGE will evaluate the Proposal based on the relevance, demonstrated success, depth, and duration of the Key Personnel's experience performing similar work. The proposed Key Personnel experience should include: a) Identifying, analyzing, and comparing alternatives to proposed transmission projects; b) Conducting screening-level technical evaluations and order-of-magnitude cost assessments; c) Evaluating environmental and community considerations using desktop-level assessment methods; d) Assessing conceptual underground transmission alternatives; and e) Evaluating non-wires alternatives ("NWAs"), grid-enhancing technologies, storage solutions, or other transmission alternatives. Proposal Preparation Instructions: The Offeror should provide two (2) project examples demonstrating the experience described above. The two project examples, considered collectively, should demonstrate relevant experience involving both 230-kV and 500-kV transmission line projects and the experience described above. A single project example is not required to involve both voltage levels. The two project examples may involve different Key Personnel, provided the Offeror clearly identifies the Key Personnel associated with each example and the Key Personnel's specific role. Each project example should address the Project Example Requirements stated above in this Annex D. Each project example will be rated from zero (0) to five (5). If fewer than two project examples are submitted, each missing project example will receive a rating of zero (0). If more than two project examples are submitted, PGE will evaluate only the first two presented. The two ratings will be averaged to determine the rating for PR1.			
PR2	RELEVANT ORGANIZATIONAL EXPERIENCE: The Offeror's Proposal should demonstrate the Offeror's organizational experience completing alternatives analyses for proposed transmission line projects during the ten (10) years preceding the Proposal Closing Date.		20	



POINT-RATED EVALUATION CRITERIA				
		[PGE EVALUATORS TO COMPLETE]		
		Score [0-5]	Weight	Assigned Score [Score x Weight]
#	Point-Rated Evaluation Criteria & Proposal Preparation Instructions			
	PGE will evaluate the depth, duration, relevance, and recency of the demonstrated experience, including the Offeror's experience completing such analyses within six (6) months. The Offeror should describe all of the following: - How they collaborated with the client to complete the alternatives analysis; - The guidance provided to the client throughout the alternatives analysis process; - How they incorporated regulatory, environmental, community, and Tribal considerations into an alternatives analysis using publicly available information and client-provided information; - How they maintained quality, schedule, and budget across all tasks and deliverables; and - How they developed objective screening criteria and documented conclusions for alternatives that were advanced or screened out of consideration. Proposal Preparation Instructions: The Offeror should provide two (2) project examples. If fewer than two project examples are submitted, each missing project example will receive a rating of zero (0). If more than two project examples are submitted, PGE will evaluate only the first two presented. Each project example must identify the start and completion dates of the alternatives-analysis work, state whether the work was completed within six (6) months, and describe the factors that affected the completion period. Each project example will be scored on a scale of 0 to 5. The two project-example ratings, including any zero assigned to a missing example, will be averaged to determine the rating for PR2.			
PR3	TEAM COMPOSITION AND QUALIFICATIONS: The Offeror's Proposal should demonstrate the availability of sufficient personnel for the project. The Offeror should: Provide an organizational chart identifying the team's structure and position titles, including all resources (including subcontractors) anticipated		20	



POINT-RATED EVALUATION CRITERIA				
		[PGE EVALUATORS TO COMPLETE]		
		Score [0-5]	Weight	Assigned Score [Score x Weight]
#	Point-Rated Evaluation Criteria & Proposal Preparation Instructions			
	for the project and their specific roles and responsibilities. 2. Submit detailed resumes for all individuals (including subcontractors) proposed for key positions. Resumes should demonstrate: a. Experience and capabilities in completing an alternatives analysis that considers advanced conductors on transmission lines owned and operated by other utilities, battery energy storage, demand response programs, energy efficiency, NWAs, or smart grid technologies; and b. Ability to collaborate effectively with client representatives, technical subject matter experts, and project stakeholders involved in planning and study activities. PGE will evaluate whether the proposed staffing composition is appropriately aligned with the screening-level nature of the study and whether the proposed allocation of personnel appears reasonable for the responsibilities assigned. The Evaluation Committee will assign one holistic rating from zero (0) to five (5) based on the Offeror's response to the criterion as a whole. The rating will then be multiplied by the applicable criterion weight.			
PR4	EXECUTION PLAN AND SCHEDULE: The Offeror's Proposal should outline an execution plan and a schedule for all phases of the Project described in the SOW. The outline should address: a) Any unique solutions or insights related to the Project described in the SOW, including identified opportunities, challenges, and milestones. Offerors are not expected to perform original engineering analysis, power flow studies, field investigations, or development of alternative-specific conclusions as part of their proposal submission. b) A Project schedule (maximum six (6) months) identifying key milestones, deliverable dates and any proposed changes to PGE's anticipated schedule. The proposed schedule must provide for completion of all tasks and initial submission		40	



POINT-RATED EVALUATION CRITERIA				
		[PGE EVALUATORS TO COMPLETE]		
		Score [0-5]	Weight	Assigned Score [Score x Weight]
#	Point-Rated Evaluation Criteria & Proposal Preparation Instructions			
	of all deliverables within six (6) months after the Effective Date. The anticipated Contract term is one (1) year to accommodate PGE review, correction of deficiencies, acceptance, and administrative closeout. c) Major risks, including potential impacts and mitigation measures that could be implemented to reduce those risks. d) How the project would be executed and who would have primary responsibility for its timely and professional completion. e) Any proposed enhancements or supplemental work products beyond the Deliverables identified by PGE. An Offeror may propose supplemental work products but must price and commit to providing all four required Deliverables in the form stated in the SOW and Annex B. The Evaluation Committee will assign one holistic rating from zero (0) to five (5) based on the Offeror's response to the criterion as a whole. The rating will then be multiplied by the applicable criterion weight.			
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;



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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 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.