

# **Request for Qualifications**

## ***Creative Agencies and Professionals***

Request for Qualifications released: October 29, 2018  
Qualifications due: 5:00 p.m., November 19, 2018

### **Introduction**

Energy Trust of Oregon, Inc. (Energy Trust), an Oregon nonprofit, 501(c) (3) corporation, is issuing a Request for Qualifications (RFQ) for a pool of Creative Agencies and Professionals that can work with Energy Trust to support a variety of branding, outreach and marketing efforts, with the goal of engaging consumers and businesses in Energy Trust programs and building momentum around energy efficiency and renewable energy throughout Oregon. The selected pool would be engaged, as needed and potentially on an ongoing basis, for the services outlined in more detail below. It is Energy Trust's intention to solicit proposals from respondents with a variety of marketing capabilities, and entries will be chosen for this pool based on their key strengths and costs.

In 2017, Energy Trust issued a Diversity, Equity and Inclusion Operations Plan which outlines ten goals intended to integrate diversity, equity and inclusion throughout the organization. One of the goals is to increase contracting opportunities for diverse businesses. Responders' evidence of good faith efforts to integrate focus on diversity, equity and inclusion into their submission in responding to this RFQ and evidence of strong teaming and inclusion in past performance will be considered in the evaluation of responses to this RFQ.

Energy Trust will require support and project work on various projects throughout the year to fulfill Energy Trust marketing and communication goals. The total budget for this work in 2019 is \$400,000. The following strategies are planned for 2019 as Energy Trust strives to expand participation and meet aggressive energy-efficiency and renewable energy generation goals.

### ***Required services and experience***

- Content strategy development
- Strategies for engagement and marketing of underserved communities, including communities of color, low- and moderate-income and rural communities
- Native content strategies and development
- Educational content on the web
- Promotional strategies for behavior change
- Marketing strategy consulting
- Creative development — print, online, radio and TV
- Integrated advertising campaigns
- Business to consumer marketing
- Business to business marketing
- Photography — scouting, talent and photo shoots
- Video production and editing
- Branding audit and Rebranding
- Outreach strategies
- Persuasion and influence campaigns

### ***Project Deliverables***

For each project, the following documents will be used

- Project scope, timeline and budget
- Development of project brief or outline for approval

## **Background**

### ***About Energy Trust***

Energy Trust is an independent nonprofit organization dedicated to helping Oregonians and Southwest Washingtonians benefit from saving energy and generating renewable energy. The organization's services, cash incentives, and energy solutions have helped participating customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas and Avista save more than \$7.6 billion on energy bills. Our work helps keep energy costs as low as possible and builds a sustainable energy future.

Energy Trust designs and delivers energy-efficiency and renewable energy programs for business and residential customers of the five participating utilities, and works with contracted companies (Program Management Contractors, or PMCs) to manage programs and bring them to the market. PMCs also deliver marketing services for Energy Trust through program advertising and collateral development, trade ally management, and face-to-face customer outreach.

Annual energy savings is achieved by engaging customers in the residential, commercial and industrial/agricultural sectors. Renewable energy projects include solar for residential and business customers, as well as custom hydropower and biogas projects.

To learn more about Energy Trust please visit [www.energytrust.org/about](http://www.energytrust.org/about).

### ***Energy Trust 5-Year Strategic Plan***

The 2015-2019 plan outlines energy efficiency, renewable energy, and operational goals. Additionally, it identifies key strategies and objectives over the plan period, including:

- Attract and serve new and more diverse customers
- Ensure internal operations are efficient and effective
- Help lower energy-efficiency and renewable energy costs to maximize our customers' return on investment
- Test and introduce new, efficient technologies even faster
- Leverage synergistic collaborations and pursue projects that yield multiple customer benefits

The 2020-2024 plan will be developed and adopted in 2019. It will be a key document for brand discussions.

### ***About Energy Trust target audiences***

Residential customers (primarily single-family homeowners, also renters)

- While metro areas may be experiencing an expanding economy, rural areas may be experiencing a stagnant economy.
- Likely to have knowledge of ways to conserve energy, but in need of trusted sources.
- Many measures are moving to midstream, where incentives are provided at the retail outlet rather than through a form that is filled out by each customer.
- Offers like bulk buys and enhanced income-qualified incentives provide opportunity to moderate-income customers, but Energy Trust is looking for additional opportunities to reach underserved customer segments, including communities of color and rural communities.
- Engage directly with contractors during an energy upgrade and may need help evaluating whether they have hired the right contractor for the job (and may utilize Energy Trust's trade ally network).

- Many are receptive to the idea of reducing waste.
- May be more likely to act after discussing energy-efficiency and conservation opportunities with an expert, peer, or neighbor.

Business customers (multifamily property owners, business owners, commercial developers)

- While some sectors may be experiencing an expanding economy, other sectors may be experiencing a stagnant economy.
- Respond to the strategic business case for investment in energy efficiency and renewable resources.
- Small and medium-sized businesses represent an important market for Energy Trust, and we are seeking more opportunities to reach this audience in a cost-effective way.
- Want to work with someone who understands their needs and demands on their time.
- May not know where to start thinking about their energy use. Payback period is most important to them.

Industry and agricultural customers (industry, farms and wood products)

- Respond to the strategic business case for investment in energy efficiency and renewable resources.
- Want to work with someone who understands their needs and demands on their time.
- Seek counsel from qualified experts; want a long-term relationship with an energy expert acting as a member of their team.
- Small and medium-sized industrial customers represent an important market for Energy Trust, and we are seeking more opportunities to reach this audience in a cost-effective way.
- Payback period most important to them.
- Likely to understand the role of energy in making their company successful.

Renewable energy customers (hydropower and biogas; residential and business solar customers fit in to the residential and business categories above)

- Relatively difficult to find the exact mix of opportunity, technology and investment.
- Have a renewable resource available for a project.
- May be involved in emerging technology for small-scale energy production.
- Energy Trust incentives are necessary for making a project viable.
- Varying levels of technical knowledge; feasibility studies inform investment decisions.

***Current marketing and communications strategy***

Energy Trust seeks to engage customers through several primary channels.

Content Marketing

Energy Trust creates video and written content to inform potential customers about offers and promote them via search engine optimization, social media and word-of-mouth.

Outreach, Sponsorship and Events

In addition to program-specific outreach staff based at PMCs, Energy Trust has regional outreach staff that coordinate outreach activities and lead community relations efforts in Eastern Oregon, Southern Oregon, and the Willamette Valley and Coast. Sponsorships and event management is shared and coordinated between general Energy Trust outreach staff and program-specific PMC staff, and Energy Trust is interested in reaching specific communities through this work.

### Advertising

Advertising creative is developed on a campaign basis, using an internally-developed strategy that is shared with an external creative resource. Energy Trust is releasing a separate RFQ for 2019 planning, buying, and trafficking advertising with numerous media outlets across Oregon and Southwest Washington across all mediums.

### Public Relations

Energy Trust has a variety of public relations needs, including planning, proactive and reactive public relations, communications work and speechwriting. Because of the breadth of work required, this work is done by a variety of contractors. Energy Trust is releasing a separate RFQ for 2019 communications/public relations work later in 2018.

### Social Media

Energy Trust uses Facebook, LinkedIn and Instagram for social media communications. They are primarily tools for customer service and public relations but are increasingly included in marketing campaigns.

### Utility communications

Energy Trust works closely with Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas and Avista on communications via utility websites, utility bill messages, utility bill inserts, newsletters, e-communications, direct mail and advertising.

### Trade Ally Network

Our network of nearly 2,400 independent contractors helps homeowners, businesses, public and nonprofit entities, developers and others complete energy-efficiency and renewable energy projects across Oregon. Quite often, trade allies are the first, last and only Energy Trust representative a residential or business customer will see.

### Energy Trust website

Energy Trust redesigned its website in 2017, and digital agency assistance is managed through a separate contract, but creative concepts can cross into this area as needed. Visits to the website are over 50,000 per month.

### Energy Trust call center

Energy Trust's call center receives 3,000-4,000 calls per month, depending on the time of year. This contract is managed separately, and the call center can support customers in multiple languages.

### ***Current brand and advertising information***

Energy Trust went through a brand refresh in 2008 that included an updated logo, website design, advertising templates, and a significant update to corporate branding guidelines in early 2009. We make adjustments to our brand tools annually to reflect changing market conditions and program offers for customers.

In early 2015, new advertising suites of print, online, TV and radio were created to support Energy Trust residential and business sectors. We expect to use those resources through 2018 and will be seeking support for new creative in 2019. While solar was included as part of each sector's offering, a separate solar campaign for print, online and radio was also developed in early 2017. A cross-sector program awareness campaign for print, online, TV and radio was developed in mid-2018.

Energy Trust is exploring more options for proactive channel partner cooperative advertising and increased co-branding with utility partners. Energy Trust maintains some internal graphic and production design resources.

### **Submission Requirements**

Responses containing the required information outlined below must be submitted electronically, in PDF format, only to Denise Olsen, project manager, at [denise.olsen@energytrust.org](mailto:denise.olsen@energytrust.org) no later than November 19, 2018 at 5:00 p.m. Energy Trust will examine all responses carefully.

#### **1. Experience and Firm Strengths, Rates (up to 3 pages):**

Please provide a cover letter describing your agency's key strengths (maximum of 3 pages) that addresses each of the following requirements:

- Describe the respondent's primary business, length of time in business, location of office(s) and contact information.
- Disclose blended rates associated with the services you provide. Specifically include hourly costs for services described in this RFQ. Energy Trust is interested in time and material pricing.
- List relevant experience with B2B or B2C marketing, behavior change promotions, content strategy, creative development or production, brand strategy, persuasion and influence campaigns, and strategies for engaging a variety of communities
- List any experience that is particular to low- and moderate-income customers, communities of color, or rural communities.
- Describe efforts and experience in integrating diversity, equity, and inclusion internally in your firm, both in staffing and in contracting for services and note whether your agency is COBID-listed and/or whether your firm is woman or minority-owned.
- Describe efforts and experience in teaming with minority and women-owned firms, for delivering services like those described in this RFQ.
- List relevant resources for supporting outreach or events, including bilingual representatives.
- Provide contact information (company/individual name, title, phone number, email and address) for three professional references regarding your relevant experience.

#### **2. Samples of work and information on staffing (up to 10 pages):**

Provide as attachments in PDF format totaling no more than 10 pages the following:

- Three to five varied examples of work you have produced in your relevant experience.
- Examples of any marketing initiatives that are informed by research.
- Short biographies or resumes, including relevant licenses, certifications and training, of key staff that would be assigned to the types of projects described above, and information regarding their availability during 2019.

### **3. Conflict of Interest Disclosure:**

Disclose any direct or indirect, actual or potential conflicts of interest with Energy Trust. A “direct or indirect conflict” is defined as any situation in which an individual or member of their family or close business or personal acquaintance, is employed by Energy Trust or the Oregon Public Utility Commission, or may be reasonably construed to have a direct or indirect personal or financial interest in any business affairs of Energy Trust, whether because of a proposed contract or transaction to which Energy Trust may be a party or may be interested or is under consideration, or whether such conflict is purely conceptual, because of similarity of business interests or affairs. If no such conflict exists, provide an explicit statement to that effect. The determination of whether a conflict of interest exists is left to Energy Trust at its sole discretion.

#### ***RFQ Governing Provisions***

By submitting a response to this RFQ, respondent represents that it is authorized to submit a response and explicitly agrees and accepts the following provisions of this RFQ and all other terms and conditions set forth in this RFQ.

#### ***Right to Accept or Reject***

This RFQ is not an agreement to purchase goods or services. Energy Trust is not bound to enter into a contract with any qualified respondent. Energy Trust reserves the right to modify the terms of this RFQ at any time in its sole discretion. This includes the right to cancel this RFQ at any time. Further Energy Trust reserves the right to waive any nonconformity in submissions received, to accept or reject any or all of the items in the submission, and award any ultimate contract in whole or in part as it is deemed in Energy Trust’s best interest.

#### ***Ownership of Responses***

All materials submitted in response to this RFQ shall become the property of Energy Trust and shall not be returned to the respondent.

#### ***Confidentiality***

Respondents shall clearly identify those proprietary portions of their responses that they do not want revealed to third parties and label such portions as “Confidential Information.” Except as required under Energy Trust policy, law or for regulatory purposes, Energy Trust will maintain confidentiality of such information.

#### ***Respondent Expenses***

Respondents are solely responsible for their own expenses in preparing a response and for any subsequent negotiations. Energy Trust will not be liable to any Respondent for any claims, whether for costs or damages incurred by the respondent in preparing the response, loss of anticipated profit in connection with any final contract or any other matter whatsoever.

#### ***Contractor Selection Criteria***

Pool selection will be the sole responsibility of Energy Trust and will be undertaken at the sole discretion of Energy Trust. Entries may be eliminated from consideration at Energy Trust’s sole discretion for any reason, but at a minimum, including by not limited to:

- The qualifications, strengths or experiences do not align with the objectives and requirements of this RFP.
- The qualifications are inconsistent with Energy Trust policies or requirements.
- A conflict of interest exists.

Qualifications will be reviewed using the following criteria:

- Demonstration of executing similar projects and services with evidence of success
- Demonstrated experience using research to develop compelling creative and messaging
- Knowledge of Oregon consumer and business sector behavior, values and motivations
- Experience and approach to projects and services with focus on diversity, equity and inclusion
- Creative aesthetic
- Reasonable cost

Agencies and professionals will be notified of their acceptance to the pool via email, and interviews may be scheduled in some cases. All entries to the pool will be provided with training on Energy Trust mission, organization, brand and style.