

Request for Qualifications

Media Buyer

Request for Qualifications released: October 29, 2018

Qualifications due no later than: 5:00 p.m., November 12, 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 Media Buyer for 2019 planning, buying, and trafficking advertising with numerous media outlets across Oregon and Southwest Washington across all mediums, with a goal of engaging consumers and businesses in Energy Trust programs and building knowledge and understanding around energy efficiency and renewable energy within diverse communities throughout Oregon. The selected media buyer would be engaged for the services listed below. It is Energy Trust's intention to solicit proposals from respondents and a media buyer will be chosen based on their cost and key strengths. RFQs for creative services and public relations will be released and managed separately.

In 2017, Energy Trust adopted a Diversity, Equity and Inclusion Operations Plan which outlines ten goals intended to integrate diversity, equity and inclusion throughout the organization. This plan aims to expand participation by ensuring greater outreach to customers who may not have been previously served by Energy Trust programs.

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.

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.

Services Sought through this RFQ and Expected Budget

Energy Trust will provide the overall advertising strategy, targeting information, advertising goals, and an overview of who our customers are. Energy Trust runs program-based ads as well as offers based on campaign models. And will also provide all creative assets. Our advertising budget for 2018 is roughly one million and the total budget for 2019 will be similar. The total advertising budget will be parsed out by program (multiple programs are part of each campaign) across media channels throughout the Energy Trust service territory. Energy Trust will provide the budget splits per program. The media buyer will take the information provided by Energy Trust and will present a proposal with the recommendations for advertising placement as outlined below. Energy Trust will review each proposal and will provide changes. Energy Trust will have the final say in placement.

The following objectives and services are planned for 2019 as Energy Trust strives to expand participation and meet aggressive energy-efficiency and renewable energy generation goals.

Advertising Primary Objectives

- Raise awareness of Energy Trust offerings and motivate customers to act
- Highlight educational tools and resources for customers

Placement objectives

- Placement throughout the Energy Trust service territory
- Particular focus on reaching underserved customers – including research into smaller community media, culturally-specific media, et al
- Recommendation of budget distributed across media channel (print, radio, TV, online, advertorial)
- Programming and timing recommendations for TV and radio
- Schedule recommendations

Invoicing and budget tracking

- Invoice: Provide one invoice per month with backup information that includes:
 - Media company, run dates, cost and totals for each campaign
- Budget splits: Provide total amount allocated by channel, by campaign, by month, by region and media publication/station

Trafficking and main contact

- Media buyer traffics all creative (creative provided by Energy Trust)
- Media buyer serves as main contact for Energy Trust on all media inquiries

Reporting

- Media buyer will provide reporting within two weeks after a campaign has been ended
- Reporting will include data such as number of impressions, when and where the TV and Radio spots ran, number of clicks (online), click thru rates, cost per click and other reporting data identified by Energy Trust

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 no later than November 12, 2018 at 5:00 p.m. Energy Trust will examine all responses carefully.

1. Experience and Strengths, Rates (up to 2 pages):

Please provide a cover letter describing your company's key strengths (maximum of 2 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 any blended rates associated with the services you provide. Specifically include total yearly costs for services described in this RFQ.
- List relevant experience with media planning and purchasing and with respect to the services sought and Energy Trust's objectives for 2019.
- List any experience that is particular to underserved communities, rural communities, or communities of color. Specifically, describe evidence of good faith efforts in past performance to integrate focus on diversity, equity and inclusion into the services you provide, including, but not limited to any teaming with minority or women-owned businesses.
- Disclose whether the respondent is Oregon COBID listed or minority or women-owned.
- Provide contact information (company/individual name, title, phone number, email and address) for three professional references regarding your media buying experience.

2. Templates and processes (up to 6 pages):

- Templates for advertising planning and reporting
- Strategic planning documents (yours or those of a client)
- Trafficking schedules and processes
- Invoicing process

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

Media Buyer 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 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:

- Reasonable cost
- Demonstration of executing strategic media buys with evidence of success
- Knowledge of Oregon consumer and business media habits and outlets
- Approach to projects and relative focus on diversity, equity and inclusion

Respondents will be notified of acceptance via email, and interviews may be scheduled.